



ANNUAL REPORT

To Membership

2022-2023



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ERAPPA BOARD

President	Sheri Vucci	Smithsonian Institution
President - Elect	Patty Smith	Cabrini University
Vice President, Professional Development	Mary Grube	St. Mary's College of Maryland
Vice President, Membership and Community Engagement	Andy Feick	Swarthmore College
Vice President, Annual Meetings	George Stooks	St. John Fisher University
Vice President, Technology and Communications	Jason Sawyer	Smithsonian Institution
Vice President, Chapter Development	Hugh Briggs	Lakehead University
Secretary	Jon Terry	Quinnipiac University
Treasurer	Phillip Melnick	Penn State University
Past President	Jessica Abbott	Wolcott Public Schools
APPA Liaison to ERAPPA	Lander Medlin	
Business Partner Representative	Leslie K. Whitby	Stantec

ERAPPA Reps to APPA Committees

Awards and Recognition Committee	Michael Dixon	MD/DC APPA
CLS Curriculum Development Committee	Johnathan Cooper	MD/DC APPA
Communication Strategies Committee	Billy Gagnon	NNECERAPPA
DEI Taskforce	Andy Feick	DVAPPA
Membership Engagement Committee	Glen Mathieu	SNEAPPA
Rex Dillow Reviewer	Jessica Abbott	SNEAPPA

President's Message

Sheri Vucci, ERAPPA President

Smithsonian Institution



ERAPPA Colleagues and Friends-

It has been an honor to have served as your ERAPPA President this past year. My first involvement with the ERAPPA Board was in 2004 when I joined the Board as Treasurer. After serving six years in the capacity of Treasurer I was elected to the role of VP for Technology and Communications where I served for two years. In 2019, I was excited and humbled to be entrusted to undertake the Presidential track, never did I expect that it would be a five year journey due to the pandemic. My time with ERAPPA has been supported by many of its former leaders, namely; Lander Medlin, Maggie Kinnaman and Mike Sofield. As President, one has an obligation to steward, guide, and grow the organization, ensuring its sustainability as a relevant organization. It is so important to mentor others in your Institution and bring them along to ERAPPA events. This is how we keep the organization growing, healthy and vibrant. A responsibility that on the surface is very daunting. However, the very structure of our organization with its well defined and active chapters on one end, bookended with an exceptional International organization on the other and supported throughout with dedicated and able people serving on a variety of ERAPPA and APPA committees, in liaisons roles, and an extremely talented Board of Directors. My personal thanks to each and every one of you who have contributed to our organization.

For those of you not currently involved in the operation of ERAPPA, should you decide to get involved, I promise you your involvement will make a significant difference to the organization and will grow you both personally and professionally.

My goal as President was to revisit our past and document the important history of the organization for those that come after us. So often, history is lost when folks move on and new people take the helm. I believe one of our responsibilities as a board is to insure that our history there for the future leaders. I am indebted to Jon Terry (ad-hoc committee chair), Dale DeBlois, Dan Gearan, Steve Peary, Joe Rubertone, Mike Sofield and Norm Young for taking on this daunting task. I'm pleased to report there has been significant progress on this initiative, which we will highlight during the annual meeting.

ERAPPA remains fiscally strong. The Board, under the leadership of its' Treasurer, continues to act responsibly in executing our stewardship obligations. The Board endeavors to manage costs while limiting increases in fees, with a priority to direct expenses to those which will have greatest benefit to the membership. The Board is mindful of the limited resources within our institutions, and therefore has revisited the travel policy to ensure those representing ERAPPA on the Board, committees and liaison roles to APPA may do so without any financial burden to their employer; we feel this removes significant barriers from those wishing to serve the organization. This financial adjustment strengthens the ability of our members to work across all levels of APPA.

Our Treasurer has once again been very thorough in ensuring all insurances, federal tax-exempt filings and financial audits are fully executed, in protection of the organization. Although ultimately not

advantageous, obtaining a sales tax-exempt status was also explored, in an effort to ensure ERAPPA minimizes costs in every way possible.

I'd like to offer a special thanks to Greg Clayton, Kevin Simpson and the entire 2023 St John Host Committee for their tireless efforts in planning and delivering another outstanding Annual Meeting. Originally planned for 2020, their efforts extended another three years and required heroic juggling of hotels, venues and speakers to reschedule all of this at what seemed like a moment's notice. Cheers to all of you!!

Sheri Vucci
Smithsonian Institution
ERAPPA President 2022-2023

Chapter Development Committee

Hugh Briggs, Vice President

Lakehead University



The ERAPPA Chapter Affairs Committee Representatives are:

Craig Hickey	President Atlantic Provinces	AAPPA
Brett Fulton	President Delaware Valley Chapter	DVAPPA
Randy Geering	President Keystone Chapter	KAPPA
Mary Grube	President Maryland-DC Chapter	MD/DC APPA
Amy Baker	President New Jersey Chapter	NJAPPA
Tom Baker	President Northern New England Chapter	NNECERAPPA
Rex Giardine	President New York Chapter	NYAPPA
Scott Johnstone	President of Ontario Universities	OAPPA
Tim Schill	President of Ontario Colleges	OCFMA
Melissa Bergeron	President of Southern New England Chapter	SNEAPPA

Outgoing Members during 2022:

Earl Farrell	President New Jersey	NJAPPA
John Witjes	President Ontario Universities	OAPPA
Kimberly Nelson	President New York Chapter	NYAPPA
Jessica Picard	President Northern New England Chapter	NNECERAPPA
Sheri Vucci	President Maryland-DC Chapter	MD/DC APPA

CHAPTER LEADERSHIP

There has been a number of changes at the president's level in our chapters. We have five new members this year. The new group has already brought an increased level of enthusiasm and provide impressive leadership to their chapter constituents. The presidents are strong leaders and will represent their respective chapters well.

There is so much opportunity for chapter presidents to take the APPA message back to their respective chapters and promote the opportunity that our APPA membership offers.

GOVERNANCE

The chapter presidents will continue to be the catalyst to promote the strategic plan at the chapter level along with other initiatives from the national to the local chapter level.

While the past two years has been challenging for all, the chapters are engaged and reaching out to the membership through meetings, events and conferences to reinvigorate the membership. This in turn will produce a pool of prospective candidates for the chapters and the ERAPPA Board. The Presidents were successful in nominating a chapter champion candidate from almost each chapter.

FINANCIAL

Most institutions continue to have financial concerns and we are working on continuing to provide avenues for our membership to attend and participate in APPA related educational offerings. The educational scholarship program offered by ERAPPA is gaining momentum and has a fulsome group of candidates to choose from across our region.

CHAPTER MEETINGS

Chapter meetings have been a combination of in person and virtual across our region. Attendance is improving over the past years. Please see chapter president reports for further detail on their chapter.

SCHOLARSHIPS

With the multitude of chapter, regional, and national **scholarships available**, we are proud that many individuals have applied for an ERAPPA scholarship. With the credential scholarship being an added bonus to your membership we continue to demonstrate the value of ERAPPA. ERAPPA has been able to provide additional scholarships with the reduction in cost to attend programs remotely.

CHAPTER INITIATIVES

With the core mission of all chapters being, **to better educate our members**, the methods of delivery are ever-changing and the chapter presidents are using the increasing new avenues as well as being leaders in promoting new methods of delivery. All options are being considered and tried to keep the membership engaged and involved.

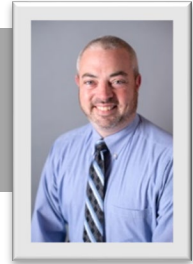
MID-YEAR & ANNUAL MEETING

This year's **Mid-Year Meeting** was held in Saint John New Brunswick and was well attended. The full annual meeting hosted by AAPPA in Saint John NB at the Saint John Trade & Convention Centre will be a great way to network and provide educational opportunities. Looking forward to seeing all of you in person this fall.

Technology and Communications Committee

Jason Sawyer, Vice President

Smithsonian Institution



The ERAPPA Technology & Communication Committee Representatives are:

Tom Gilmore	Atlantic Provinces	AAPAA
Christi Muller Ford	Delaware Valley	DVAPPA
Jim Lewis	Keystone Chapter	KAPPA
Brad Newkirk	Maryland DC Chapter	MD/DCAPPA
Gus Bing	New Jersey Chapter	NJAPPA
Billy Gagnon	Northern New England Chapter	NNECERAPPA
John Moore	New York Chapter	NYAPPA
Colleen McArthur	Ontario Colleges	OCFMA
Vacant	Ontario Universities	OAPPA
Peyton Gibson	Southern New England Chapter	SNEAPPA
Vivica Williams	ArchScan	Business Partner

Outgoing Members during 2022/2023:

- Rich McEvoy
- Lavone Broxton
- Brett Fulton
- Erik Cagle
- Gordon Robins

Web Sites for Host Committees

Provided guidance and support to the ERAPPA 2023/2024 Host Committees

It was decided that future annual websites will be part of the ERAPPA.ORG website. This will save money overall and provide more traffic to the ERAPPA site.

ERAPPA.ORG Website

Continued to support the ERAPPA website. We continued adding webinar links to YouTube versus uploading the entire video in the members-only area.

Posted job vacancies when requested.

Continued to monitor traffic and try to improve visibility.

Zenfolio- Photo Website

The ERAPPA board approved the purchase of a new website for storing and sharing photos.

We began collecting photos from all sources to populate the site.

Photos in the member-only area are being transferred to the new website.

[ERAPPA Photographs ERAPPA Annual Meetings \(zenfoliosite.com\)](https://zenfoliosite.com)

Social Media Contractor

The ERAPPA board approved funding to outsource social media posting to better communicate this year. The contractor, EZ Local, began posting weekly on various platforms like Facebook, Instagram, and LinkedIn. T&C provides the content to the contractor from the various committees.

Website Contractor Support

Requested the Captcha be repaired as we were receiving spam emails through the contact forms.

Continue to have a problem with new requests to access the member-only area. OgoSense is still working on the problem.

Benchmark Email

Sent out six emails this year to the members informing them of new leadership with the ERAPPA board and to advertise upcoming events.

Chapter Websites

The Committee considered adding a discussion board to the ERAPPA site but decided that discussion boards should remain at the Chapter level.

Webinars presented by ERAPPA

The technology team supported educational webinars as they continued a series of free web presentations for ERAPPA members.

Scholarships

Assisted with updating the scholarship forms and website language for ERAPPA members to apply. This included a workflow for the supervisors to approve the applicant's submission.

Microsoft Office/Teams

We continued to support the Board and their use of the Microsoft Office tools.

Future Initiatives

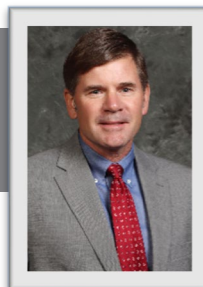
Continue to improve email contact lists and research better methods to stay organized.

Support the archival group in any technology needs to assist in their fact-finding mission.

Member and Community Engagement Committee

Andy Feick, Vice President

Swarthmore College



David MacDonald	Atlantic Provinces	AAPPA
Vacant	Delaware Valley	DVAPPA
Brian Richardson	Keystone	KAPPA
Darryl Williford	Maryland/DC	MDDCAPPA
Tawanda Thomas	New Jersey	NJAPPA
Tandra Boilard	Northern New England	NNECERAPPA
Gary Goss	New York	NYAPPA
Kathryn Brubacher	Ontario Colleges	OCFMA
Ron Ogata	Ontario Universities	OAPPA
Glen Mathieu	Southern New England	SNEAPPA
Nick Cerro	Business Partner Representative	NNECERAPPA
Lander Medlin	President & CEO	APPA

Outgoing members and vacancies during 2022/2023:

Jeff Schmidt	Delaware Valley	DVAPPA
Josh Johnson	New Jersey	NJAPPA
Jim Burcham	Maryland/DC	MDDCAPPA

The Member and Community Engagement Committee welcomed 3 new members during 2022-2023.

Member and Community Engagement Committee Responsibilities

The ERAPPA Membership Committee's charge is to provide strategic guidance to aid in the recruitment, retention and growth of an actively engaged membership. This is done with the vision of providing ERAPPA members with the requisite knowledge, values and services to elevate the educational facilities professional, and to transform learning institutions.

The Committee continuously reviews membership data to ensure ERAPPA is reaching out to institutions and business partners to welcome new staff and to those who are not members of APPA and ERAPPA; to those who have not selected regional membership (APPA-only); and to re-engage members who have dropped their memberships. The Committee works closely with other ERAPPA committees to ensure APPA and ERAPPA products and services are meeting the needs of members.

The Committee consists of representatives from each active ERAPPA chapter (and one

member is appointed to serve on APPA's Membership Committee). The Membership Committee holds monthly virtual meetings and has two face-to-face meetings annually – one at the ERAPPA Mid-Year-Meeting (expenses covered by ERAPPA) and the other at the ERAPPA Annual Conference (expense borne by the member's institution.) Each Member is expected to provide feedback to their chapters on the activities, actions, and initiatives of the Committee, and to actively market and promote the value of APPA and ERAPPA membership. I, the Committee Chair, was unable to attend the mid-year meeting in March in St. John and I want to thank Gary Goss for volunteering to be the Acting Committee Chair for the meeting.

Mission Statement - ERAPPA Member and Community Engagement Committee

The ERAPPA Member and Community Engagement Committee is organized for the purpose of maintaining proactive relationships with all categories of membership. The Committee will utilize the educational tools provided via chapter, regional, and national providers as we engage to become lifelong learners in our professional lives. We recognize that professional interaction will be the grass root effort as we maintain and grow the number of member institutions. Together with the ERAPPA Professional Development Committee, the M & CE Committee provides strategic guidance to our chapters to retain and grow an actively engaged membership and recommends to the Board strategies for growing ERAPPA membership and retaining current members. The Committee accomplishes this in part by working closely with APPA, the Chapters and by producing and approving annual member recruitment goals and strategy, and periodically reviewing and adjusting the goals as needed. The Committee, through its APPA Liaison, provides perspective on the needs and expectations of ERAPPA's membership and works in tandem with other ERAPPA committees to assist in meeting those expectations.

ERAPPA Annual Conference

The 2022 ERAPPA annual conference took place September 18-21 in Verona, New York. The conference provided attendees with numerous, positive networking opportunities and attracted 407 educational and business partner participants and 81 business partner booths in the Hall of Resources. Participants were updated by members of the Board at the business meeting on September 20, 2022. At ERAPPA meetings, it is customary for participants to learn, network, and enjoy some SWAG. Pre-registered participants received a complimentary conference bag. Member and Community Engagement committee members welcomed first time attendees with a pre-conference networking reception and FTA's received a complimentary lunch bag with a Bluetooth speaker, both bearing the ERAPPA logo. The FTA reception attendees are introduced to their chapter leadership and other FTA's from their chapters and given an overview presentation to familiarize them with APPA and ERAPPA. The committee members, recognizable in gray vests, also provided registration and conference assistance to first-time attendees.

Scholarships and Recognition

ERAPPA awarded eight Ambassador Scholarships to conference attendees, which provided a complimentary conference registration to first-time attendees or an attendee who had not attended an ERAPPA regional conference in the last five years.

The 2022 ERAPPA Ambassador Scholarship winners were:

Chapter	Last Name	First Name	Institution/Program
AAPPA	MacDonald	David	Dalhousie
OAPPA	Brubacher	Kathryn	Conestoga College
NYAPPA	Rowe	Robert	Coll of St. Rose
NYAPPA	Serafini	Paul	Coll of St. Rose
NYAPPA	McCarthy	Meghan	Binghamton
KAPPA	Bradley	David	Penn State
KAPPA	Morgan	Todd	Penn State
MDDCAPPA	Eide	Zachary	UMD

ERAPPA awards Educational Scholarships to individuals who submit applications. The process is competitive, and all submissions are reviewed by a sub-committee of the ERAPPA Board of Directors. Winners attend a program in the year following the award. Attendees are requested to share a brief written report sharing how the educational program benefited them personally and professionally.

The 2022 ERAPPA Educational Scholarship winners were:

Chapter	Last Name	First Name	Institution/Program
SNEAPPA	Bergeron	Melissa	UMass
NJAPPA	Greenwood	Allison	NJIT
AAPPA	Shelton	Craig	Dalhousie
AAPPA	MacDonald	David	Dalhousie
OCFMA	Sasso	Tony	Conestoga Coll
SNEAPPA	Schock	Heidi	URI
NNECERAPPA	Boilard	Tandra	Philips Exeter Academy
DVAPPA	Brus	Sebastian	St. Joseph's U

ERAPPA Member and Community Engagement Committee Goal Achievement

- ✓ Completed a successful transition of VP from Patty Smith to Andy Feick from DVAPPA
- ✓ Assisted FTA's at registration in Verona, NY
- ✓ Hosted a successful FTA reception in Verona, NY

- ✓ Awarded eight Ambassador Scholarships to the 2022 ERAPPA Conference in Verona, NY
- ✓ Awarded eight educational Scholarships to APPA U

ERAPPA Member and Community Engagement Goals

- ✓ Help existing members navigate their ERAPPA/APPA membership renewal
- ✓ Helping new attendees to leverage the most education from an ERAPPA Annual Meeting
 - Continue with the successful pre-conference outreach to ERAPPA annual meeting FTA's
 - Enhance the ERAPPA annual meeting FTA registration presence with table skirts to help FTA's find support
 - Fill vacant committee positions
 - Support this major goal using a proactive approach to newly registered attendees with an 8 point "touch"
 - The pre-conference outreach includes (1) a welcome letter from the VP, followed by (2) a phone call or email from their Chapter M & CE Committee member, followed by a (3) Webinar. At the Conference, (4) Committee members will be present at Registration to individually welcome each new attendee and assist with Guidebook, the lay of the land, etc. The traditional (5) First Time Attendee Reception remains a welcoming event where new attendees are introduced to the APPA/ERAPPA/Chapter leadership. Touchpoint (6) includes assisting new attendees with the Hall of Resources and introducing them to their colleagues and Business Partners. The (7th) interaction is greeting and extending invitations to the FTA Breakfast tables on Monday morning. This may also extend to lunch or any other event that is included in the schedule. Again, offering to help the new attendees get to educational sessions, sharing knowledge of what to expect at the Tuesday Business Meeting, etc. The (8th) The last formal "touch" is a post-conference note to those who attended for the first time. The Committee would like to gain feedback from the process.
- ✓ Continue to grow the profession by encouraging each other and those at our campuses to participate in our local and regional chapters.

Professional Development Committee

Mary Grube, Vice President

St. Mary's College of Maryland



The ERAPPA Professional Development Representatives for 2022 -2023 are:

Kris Kierstead	Mount Allison University	AAPPA
Chris Andreozzi	Thomas Jefferson University	DVAPPA
Gregory Black	Millersville University	KAPPA
Quajalyn Amos	University of Maryland College Park	MDDCAPPA
Tim Pratt	Bates College	NNECERAPPA
Juanita Larrabee	SUNY Cortland	NYAPPA
Stepanka Elias	University of Waterloo	OAPPA
Lan Chi Nguyen Weekes	La Cite College of Applied Arts & Technology	OCFMA
Jerry Santos	University of Massachusetts	SNEAPPA
John Argento	Princeton University	NJAPPA
Cristina Roth	Stahl Schaeffer Engineering	Business Partner Representative

Outgoing members during 2022/2023:

Melissa Bergeron	University of Massachusetts	SNEAPPA
Amy Baker	New Jersey Institute of Technology	NJAPPA

The Professional Development Committee met once this year:

At the ERAPPA Mid-Year Meeting in Saint John, New Brunswick:

The Committee continues its active involvement with and in support of the Host Professional Development Committee as we reviewed, selected, collaborated, and prepared for the five diverse tracks of educational programming for the upcoming two core days of the ERAPPA 2020 + 3 Annual Meeting September 24 – 27, 2023.

Conference calls have been held monthly and emails were exchanged with the committee throughout the year. The Professional Development Committee also meet several times throughout the year with ERAPPA 2020 + 3 Host Professional Development Committee to prepare for the educational sessions for the upcoming Annual conference. Additionally, both Host Professional Development Committee co-chairs participated in the monthly ERAPPA PD calls to provide updates on on-going initiatives.

ERAPPA Initiatives:

Lunch & Learn Webinars – ERAPPA's Lunch & Learn Webinars continue to be well received and well attended. Webinars were held in November 2022 (*The Buildable Campus Master Plan*), January 2023 (*Mold - Common Pathways for a Common Problem*), March 2023 (*Mastering Your Own Facility Management Destiny!*), May 2023 (*Facilities Customer Service*), and July 2023 (*Bergen Community College One-Stop: Innovative Space Utilization Meets Efficient Design*).

Members of the PD Committee serve as the Speaker Liaison through the process of each webinar; reviewing the communication pieces promoting the webinar, reviewing the presentation content, and providing feedback on that content.

Continuing Education Credits:

Program Certifications – The PDC continues to certify qualifying programs for AIA Continuing Education credits for AIA Members and Architects at the Annual Meeting. The PDC supplies certificates of attendance for all attendees who may use these offerings to document their attendance toward fulfilling their discipline's continuing education requirements. This year certificates were provided for attendance at webinars that have been approved for AIA CEU credits.

Credits for Chapter Programming – The PDC can assist chapters to get programming certified for AIA Continuing Education credits.

The committee continues to work with APPA and each other to understand the continuing education needs and documentation requirements of facilities professionals from varied educational and professional backgrounds and to understand how these requirements may vary by Province or State.

APPA Initiatives:

CEFP Credentialing – ERAPPA, working with APPA, has underwritten the cost associated with these desirable certifications. From July 2022 to June 2023, 78 people from ERAPPA used a FREE coupon to register for the CEFP credentialing.

Supervisor's Toolkit - Specifically tailored to meet the needs of developing supervisors in the facilities management profession. Supervisor's Toolkit has successfully been dovetailed within annual meetings and has been offered in several ERAPPA chapters through the year. It consistently fills the room, attracting staff from multiple institutions and sometimes neighboring chapters.

APPA U – The Institute for Facilities Management and The Leadership Academy will be held September 10-14, 2023 in Indianapolis. Additionally, new this year to the APPA U program is **APPA U+** which provides sessions for Supervisor's Toolkit; APPA Custodial Guidelines; Taking the Pain Out of the Turnover Process; and Pathway to Professionalism (P2P)

The Institute for Facilities Management offers four core course tracks during each week-long session: General Administration & Management; Maintenance & Operations; Energy & Utilities; and Planning, Design & Construction. Institute students select one core area that will be the focus of their classes for that week. Morning classes consist of required courses, centering on the core area selected. Afternoon classes are electives chosen by the student and may be a combination from any of the four core areas. Upon completing each week-long session, students will receive a certificate of completion designating their core area of study and 3.0 continuing education units (CEUs). To receive maximum benefit, APPA recommends that students work towards graduation from the full Institute program by completing all four-core areas.

The purpose of *The Leadership Academy* is to enhance and further develop leadership throughout the educational industry. It provides opportunities for administrative professionals to increase their awareness of industry issues, learn the skills necessary to handle today's changes, and discover the leadership potential within each of us. The Leadership Academy has been developed for, and focuses on, the educational institution's facilities staff, buyers/purchasing agents, business/finance professionals, and auxiliary services professionals. Academy attendees focus on one of four tracks per session: Individual Effectiveness Skills; Interpersonal Effectiveness Skills; Managerial Effectiveness Skills; and Organizational Effectiveness Skills – A Seat at the Table. Graduates of The Leadership Academy are uniquely prepared to demonstrate the value of the facilities department in furthering their institution's educational mission.

Continuous Learning Offerings – APPA's new Continuous Learning Series (CLS) is aimed at providing more immediate access to the information, training, and peer-to-peer learning needed during this age of accelerations. It will enable facilities professionals to access the most relevant and current knowledge available on a wide range of topics and across a number of platforms and mediums.

Thought Leaders Series - APPA developed the Thought Leaders Series to conduct dedicated discussions on the future of higher education and the impact of that future on educational facilities. Since 2006, the annual Thought Leaders symposium and resulting monograph have addressed a variety of topics related to higher education and affecting the campus-built environment. APPA's Thought Leaders program is a component of the Center for Facilities Research (CFaR). The annual Thought Leaders symposium convenes representatives of colleges and universities from across the United States and Canada alongside association leaders, industry consultants, and education experts. The 2023 Thought Leaders Symposium took place March 6-8, 2023 and the topic was, *Post-Pandemic Leadership in Higher Education*.

Annual Meetings Committee

George Stooks, Vice President

St. John Fisher University



The ERAPPA Annual Meetings Host Committee Chairs/Co-Chairs are:

Greg Clayton	University of Prince Edward Island	AAPPA	(2023)
Kevin Simpson	University of New Brunswick – St. John	AAPPA	(2023)
Leslie K. Whitby	Stantec	DVAPPA	(2024)
Amber Donato	Moravian University	DVAPPA	(2024)
Amy Baker	New Jersey Institute of Technology	NJAPPA	(2025)
Jessica Abbott	Wolcott Public School	SNEAPPA	(2026)
Melissa Bergeron	UMass Amherst	SNEAPPA	(2026)

The ERAPPA Annual Meetings Committee (AMC) consists of the Vice President for Annual Meetings and the Chair or Co-Chairs for all established host committees of the current and future ERAPPA Annual Meetings. The AMC meets twice per year at the ERAPPA Mid-Year Meeting and the ERAPPA Annual Meeting to review the broad issues that may affect all current and future host committees (changes to the Annual Meeting Guide or budget template, for example). Additionally, the Vice President for Annual Meetings joins each individual host committee's regularly scheduled meetings (typically by a TEAMS or ZOOM conference call). These calls allow the VPAM to remain engaged in each year's planning process and maintain continuity from one year to the next. The Vice President for Annual Meetings serves as the liaison between the ERAPPA Board and all active host committees, advocating on the host committees' behalf on initiatives that require action by the ERAPPA Board to facilitate change and act in the best interest of the broader ERAPPA membership.

In the 2022 report we were hoping to see interest ramp up from both Business Partners and institutional members in attending an annual meeting after a 2 year hiatus. Since that report the annual meeting on site in Verona, New York was a resounding success. The forecast of institutional attendees and to some extent business partners was not meeting the projections just 6 weeks out from the conference date. A surge in registrations over those weeks resulted in an exceptional turnout. It made a statement that ERAPPA annual meetings in person were back and the number of 1st time attendees was quite high

The host committee leadership from our AAPPA Chapter in Canada joined fellow ERAPPA members and Business Partners at the Verona conference in an effort to stoke excitement for ERAPPA 2023 or as they have cleverly branded it, ERAPPA 2020+3. In preparation for the 2023 annual meeting, the board and committee members traveled to the mid-year meeting (MYM) in St. John New Brunswick. The MYM is used as the primary working meeting where we set the professional development agenda, visit the venues and is one of two meetings each year where the individual committees get a chance to meet with the others. Through the spring and into this summer the host committee has gained momentum and at the end of July shared that the Hall of Resources is sold out and they have Business Partners on a waiting list.

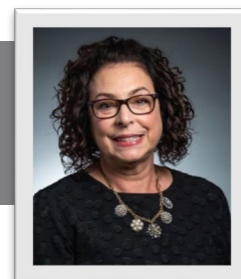
Future host committees are gaining momentum ERAPPA2024 will be in historic Valley Forge, Pennsylvania. ERAPPA2025 will be in Atlantic City New Jersey and ERAPA2026 will be in Providence Rhode Island. We will hear more about these annual meetings when we are together in New Brunswick.

I encourage our members, especially those newer to our profession, to get involved. The experience of serving as a Chair/Co-Chair or member of a host committee is very rewarding. Such involvement and the commitment of time pays dividends in the long run. I encourage everyone to give it a try. The friendships formed and professional network you will build will last throughout your career as a facilities professional. Who knows, some will last a lifetime.

Business Partner Representative

Leslie K. Whitby

Stantec



Business Partner Representative

The Business Partner Representative on the ERPPA Board of Directors chairs the Business Partner Committee. The Business Partner Representative is an elected position for a two-year term, and they may serve a total of up to three consecutive terms. I am currently running for my first two-year term.

The Business Partner Representative is a voting member of the ERAPPA Board, who acts in the capacity of a liaison between the ERAPPA Board and the ERAPPA Business Partners. This Board position is to provide current information on behalf of the Business Partners membership and is responsible for communicating Board initiatives that impact ERAPPA Business Partner Membership to the members-at-large.

The Business Partner Chairperson may remain on the Business Partner Committee at the conclusion of their Board service as a general member of the committee for the purpose of information sharing and continuity, like the role of a past president.

Charge

The role of the Business Partner Advisory Committee is to identify and promote effective means of communication and support between ERAPPA Business Partners and ERAPPA Institutional Members and to build and enhance mutually beneficial relationships. The Committee seeks to continually evaluate, validate, and promote the benefits of an ERAPPA membership and the value that participation can bring to members of the business partner community. To accomplish this task, the Committee encourages and receives feedback from all Business Partners supporting ERAPPA and its various Chapters. Additionally, the Committee strives to offer creative thinking and innovative ideas that support the purpose and values of the Eastern Regional Chapter of APPA.

Expectations & Responsibilities of Committee Members

Each Committee representative should begin and continue their role with a passion for the work of the Committee and provide support for the Chairperson and other Committee members alike. As with other ERAPPA committees, there is the expectation of full participation to the maximum extent possible in Committee meetings, held 10-12 times each year, primarily virtually. There are two face-to-face meetings per year; the first being the Mid-Year meeting in March, held at the same location as the fall Annual Meeting, with all expenses covered by ERAPPA, and the other is in conjunction with the ERAPPA Annual Meeting, at the committee member's/company's expense. There is an expectation that Business Partner committee members will make every effort to attend both face-to-face meetings. Additionally, each committee member should participate in their local chapter Board Meetings and share initiatives back and forth within the eastern region, attend their local chapter meetings, and provide routine

feedback to their boards on the activities, actions, and initiatives of ERAPPA's Business Partner Committee.

Committee Structure

Business Partner Representatives may be appointed by local Presidents that represent each of the active Chapters within the Eastern Region of APPA and serve a specified term, usually two years. Incoming presidents, at their discretion, may choose to appoint a new Business Partner Representative, continue with the current Business Partner representative, or fill the position as specifically defined through local chapter by-laws.

Our current members shown with their respective chapters below:

DVAPPA / ERAPPA	Leslie K Whitby, Chairperson, Stantec
DVAPPA	Meaghan Finney, Voith & Mactavish Architects
KAPPA	Cristina Roth, Stahl Sheaffer Engineering
SNEAPPA	Norm Young, Norm Young Consulting Services
MD/DC APPA	Vivica Williams, archSCAN, LLC
NYAPPA	Nicholas R. Cerro, C & S Companies
NNECERAPPA	Larry Ipnataro, Competitive Energy

Term Limits

The ERAPPA Board determined that local Chapters should establish the length of term. Two-year terms are currently consistent across participating chapters.

Committee Initiatives (Ongoing)

Business Partner Best Practices: As business partners, we can be key contributors to the professional development of our institutional members. It is our mission to promote professionalism and provide guidance to new business partner members, so that they embrace ERAPPA's overall vision designed to understand the needs of its members, be a key resource for their professional development and inspire them to reach full potential as facilities management professionals.

The ERAPPA Business Partner committee would like to implement a Membership Engagement committee at each of ERAPPA's local chapters. These committees will allow Business Partners (BP) to engage at the local level. The goal of the Membership Engagement committee is to grow the chapter membership, retain existing membership, promote local events and to take on the responsibility of updating and maintaining the chapters membership mailing lists.

The Membership Engagement committee will be led by the chapters Business Partner board representative and work closely with their boards VP of Membership. The committee should be made up of both business partners and institutional members (if possible).

The ERAPPA BP committee will work on developing a mission statement and specific goals for the 2024 Membership Engagement committees. We will review the success of each committee at the end of

2024 and report back to each chapter's board and the ERAPPA BP board member will report the overall success to the ERAPPA board.

The Membership Engagement committee will allow some consistency between ERAPPA chapters and sharing of ideas, successes and lessons learned. These committees are intended to create collaboration between chapters and help build upon our overall success.

Business Partner Membership Benefits

There is a need for stronger, tangible Business Partner benefits to improve Business Partner participation. We continue to have discussions to enhance Business Partner benefits. Beyond the obvious networking and camaraderie experienced at the conference, we identified a need for tangible, meaningful benefits. On January 11, 2018, the Board approved the following benefits:

- Opportunities to present relevant educational programs at our Annual Conference. (Selections are made through a "Call for Papers" process.)
- Opportunities for increased recognition through sponsorship of the ERAPPA Annual Meeting. Business Partner members receive exclusive advanced release of sponsorship opportunities.
- Early booth selection offered to members only.
- Through our "Webinar Lunch and Learn" program, Business Partners will have additional opportunities to present relevant educational content offered exclusively to ERAPPA Institutional membership throughout the year. Selections are made through a "Call for Papers" process.
- Assistance from our Professional Development Committee to have BP educational content reviewed for Continuing Education Units (CEU) potential, through direct access to our contracted AIA Reviewer. (Applicable for Annual Conference and Webinar programs only.)
- Our membership is like no other when it comes to open, collaborative networking. Ask any ERAPPA current Business Partner Advisory Committee members and they will tell you that through participation BPs will build connections with facilities professionals in the educational marketplace and increase their professional network.
- Through our educational sessions and programs, BPs will remain current with interests, innovations, and trends that impact facilities administrators in education.

The Business Partner Committee continues to strategize about how to create specific benefits and areas for improvement associated with the Annual Conference. These include:

- Increased Traffic to Resource Hall
- Opportunities for "real" conversation time
- Revamping the conference schedule
- Allow for unscheduled time to connect with clients (potential solutions):

The Business Partner Committee will continue to develop potential solutions and will present them to the Board for consideration once further developed.

Business Partner Chapter Representation

2023 was the year of relationship building. As a part of this process, we placed emphasis on connecting our Business Partners Reps to their local chapters, and encouraged our local chapters to appoint and engage a Business Partner Rep. I am pleased to report that MD/DCAPPA is our newest local chapter to develop a Business Partner membership program. They have appointed a representative for their chapter, who will serve on the MD/DCAPPA chapter.

The Business Partner Representative on the ERPPA Board of Directors chairs the Business Partner Committee. The Business Partner Representative is an elected position for a two-year term, and they may serve a total of up to three consecutive terms. I am currently running for my first term.

The Business Partner Representative is a voting member of the ERAPPA Board, who acts in the capacity of a liaison to provide current information on behalf of the Business Partners membership and is responsible for communicating Board initiatives that impact ERAPPA BP Membership to the members-at-large.

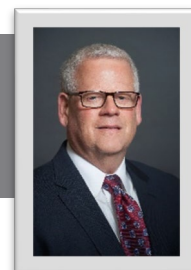
The Business Partner Chairperson may remain on the Business Partner Committee at the conclusion of their Board service as a general member of the committee for the purpose of information sharing and continuity, like the role of a past president.

It has been my pleasure to serve as the ERAPPA Business Partner Liaison to the Board.

Treasurer's Report

Phillip Melnick, Treasurer

Penn State University



ERAPPA Year-End Treasurer's Report July 1, 2022– June 30, 2023

The 2022-23 fiscal year resulted in a net financial surplus in the amount of \$6,783.81. This is 106% less than the (\$121,216) budgeted deficit.

Revenue from membership dues was 13.2% less than budgeted. Annual meeting revenue was 115% greater than anticipated. Shoutout to the NYAPPA host committee for the amazing job they did. Total revenue was \$46,690.54 more than projected.

ERAPPA continues to make a significant investment in our members, spending almost \$63,000 on scholarships and credentialing coupons. Scholarships that were not used in 2023 will be carried over into the 2024 year.

Three chapters took advantage of the Partner's in Education (PIE) funding available, with a grant of up to \$2,000 awarded to cover speaker expenses for their chapter meetings.

Accounting fees are for the services provided by our Certified Public Accountants firm Novak|Francella for the auditing of the financial records for the year ending June 30, 2023, and the preparation and filing of the federally required annual 990 return.

The Mid-Year meeting in 2023 was held in Saint John, New Brunswick. Total expenditures were \$71,942, which is less than budgeted, due in large part to many committee members participating virtually or not being able to attend.

Accounts payable reflect money owed for CEFPP coupons purchased, reimbursement for board travel, and costs for accounting services incurred for the 2022-23 audit and tax preparation but not yet paid.

Scholarships payable of \$33,940 consist of scholarships awarded but not yet used by June 30, 2023. Accounts receivable balance is \$1,836 due to an expected refund for the 2022 mid-year meeting that was not received by year-end. On June 30, 2023, our cash balance was \$259,956 with prepaid expenses of \$15,020, prepaid scholarships of \$16,345, and investments of \$203,507, for an asset balance of \$496,664. This is a decrease in our current asset position of \$49,200 from June 30, 2022.

ERAPPA remains financially stable after enduring another difficult year. ERAPPA remains financially healthy with a current asset position that offers stability in difficult economic times. The ERAPPA board remains vigilant in protecting ERAPPA's financial health as we navigate through the impacts caused by inflation and widespread institutional budget retrenchment regionally and nationally in higher education.

Respectfully Submitted,

Phillip Melnick CEFPP, CRL
ERAPPA Treasurer

ERAPPA YEAR-END STATEMENT

July 1, 2022 - June 30, 2023

2023

ITEM	BUDGET	Yr End TOTAL	Variance
REVENUE:			
Interest	400.00	1,628.47	1,228.47
Dues	136,704.00	118,656.00	(18,048.00)
Annual Meeting Proceeds	54,800.00	118,310.07	63,510.07
Sales (Misc Revenue)	-	-	-
TOTAL REVENUE	<u>191,904.00</u>	<u>238,594.54</u>	<u>46,690.54</u>
OPERATING EXPENSES:			
Uncategorized Expense	-	-	-
VP Annual Meetings			
Host Com Visits	2,500.00	1,844.93	655.07
Winter (Mid-Year) Meet - Co-hosts	7,800.00	3,508.00	4,292.00
Annual Meeting expense	-	(604.88)	604.88
Failed Meeting Expense	-	-	-
sub-total	<u>10,300.00</u>	<u>4,748.05</u>	<u>5,551.95</u>
VP Chapter Affairs			
Winter (Mid-Year) Meet - CA Comm.	11,700.00	11,279.11	420.89
sub-total	<u>11,700.00</u>	<u>11,279.11</u>	<u>420.89</u>
VP Membership			
Winter (Mid-Year) Meet - Mem Comm.	13,000.00	14,313.32	(1,313.32)
Membership Initiative	4,600.00	7,125.32	(2,525.32)
sub-total	<u>17,600.00</u>	<u>21,438.64</u>	<u>(3,838.64)</u>
Board - Administration			
Miscellaneous	1,000.00	145.80	854.20
Travel- ERAPPA Annual Meeting	5,000.00	6,130.44	(1,130.44)
Travel - APPA Annual Meeting	-	-	-
Printing & Postage	500.00	1,990.36	(1,490.36)
Marketing	15,000.00	885.88	14,114.12
Insurance	4,000.00	3,767.00	233.00
Incorporation	25.00	25.00	-
Board Meet - Winter (Mid-Year) Meet	40,000.00	26,754.34	13,245.66
Board Meet - Summer	15,000.00	13,543.38	1,456.62
Board Meet - Annual	16,000.00	15,608.67	391.33
Bank Fees	-	-	-
Accounting Fees	18,500.00	13,565.70	4,934.30
Software Fees	600.00	660.00	(60.00)
Dues Collection Fees	13,670.00	11,865.61	1,804.39
Annual Meeting Expense	2,000.00	-	2,000.00
Commissions & Service Fees	-	-	-
Ad-Hoc Meetings - Conference Calls	-	-	-
sub-total	<u>131,295.00</u>	<u>94,942.18</u>	<u>36,352.82</u>
VP Technology-Communications			
Web Review & Development	7,500.00	2,731.64	4,768.36
Microsoft Office 365	2,300.00	2,237.32	62.68
Winter (Mid-Year) Meet - T&C Comm.	13,000.00	10,174.72	2,825.28
ERAPPA Communication	1,000.00	925.27	74.73
sub-total	<u>23,800.00</u>	<u>16,068.95</u>	<u>7,731.05</u>
Awards / Scholarships			
Scholarships & Expenses	34,000.00	19,873.64	14,126.36
Credentialing Scholarship	45,000.00	42,900.00	2,100.00
Ambassador Scholarship Top-Up	-	-	-
Student Ambassador Scholarship	-	-	-
Awards	6,000.00	5,761.88	238.12
sub-total	<u>85,000.00</u>	<u>68,535.52</u>	<u>16,464.48</u>
Professional Development			
Misc. Prof Develop. Expenses	1,125.00	2,665.00	(1,540.00)
Partners-in-Education Support (PIE)	8,000.00	6,000.00	2,000.00
Winter (Mid-Year) Meet - PD Comm.	14,300.00	6,133.28	8,166.72
PD Webinar Expense	-	-	-
Annual Meeting Grant	10,000.00	-	10,000.00
Toolkit Sponsorship at Annual Meeting	-	-	-
sub-total	<u>33,425.00</u>	<u>14,798.28</u>	<u>18,626.72</u>
Expenses Total	<u>313,120.00</u>	<u>231,810.73</u>	<u>81,309.27</u>
NET	<u>(121,216.00)</u>	<u>6,783.81</u>	<u>127,999.81</u>

ERAPPA Proposed Budget Treasurer's Report
July 1, 2023 – June 30, 2024

For the fiscal year 2023-24 the ERAPPA Board is proposing an operating budget that will result in a year-end operating loss of \$80,269. This loss is due primarily to expected reduced annual meeting revenue in 2023-24 and lower dues collection.

The budgeted revenue for membership dues represents the three-year average. As ERAPPA dues are a percentage of the APPA dues, any increase or decrease in APPA dues will result in an increase or decrease in ERAPPA dues. For the eleventh consecutive fiscal year, the ERAPPA dues percentage itself will not increase in fiscal year 2023-24. However, at its June 2023 meeting, the ERAPPA board agreed to raise ERAPPA dues by 2% for the 2024-25 and the 2025-26 fiscal years. This increase will help ensure the fiscal health of the organization in the future.

ERAPPA's other primary source of revenue is the 50% share of the annual meeting surplus. The host committee determines the projected annual meeting net income. This year, the annual meeting income is projected to be lower than in past years. While this may result in less revenue for the organization, it is something that ERAPPA is well-positioned for due to excellent stewardship of ERAPPA's financial resources by the board through the years.

In this budget, the Board continues to support educational opportunities for our members. In 2023-24 ERAPPA will be awarding eight educational scholarships with a total value of \$34,000, for in-person learning opportunities, and CEFP credentialing coupons valued at \$33,00, to continue offering our membership the incentive to obtain their certified educational facilities professional certification. This is a one-year decrease in CEFP credential coupon support as the board evaluates the efficacy of this program.

Recognizing an impediment to some individuals being able to serve on the ERAPPA Board is the lack of institutional funding to attend meetings, this budget, consistent with previous budgets, maintains the inclusion of travel and accommodation expenses for Board members to attend the annual meeting.

Continuing in 2023-24, a grant of \$10,000 will be available to host committees, replacing previously provided seed money, which will not need to be repaid. The board is continuing its support of educational opportunities for the chapters by budgeting \$8,000 in Partners in Education grants to cover speaker expenses at chapter events.

This budget once again is forecasting a planned deficit like the 2022-23 budget. While we anticipate a less significant financial loss this year as compared to what was planned for last year, the organization's financial health remains strong, allowing the board to not increase the membership dues rate this year. Unfortunately, continued economic pressure on the budget projecting 10 years into the future required an increase to dues for the following two years to maintain a strong financial position. It is important to note, at the June 2023 summer meeting, the Board exhaustively reviewed the budget, ensuring each expense item is required, managed and reasonable. This budget is one in a ten-year cycle, based on rotating meeting locations. Despite reduced annual meeting revenues for this year and the past three years that sustain the organization, the Board is carefully managing and updating this 10-year budget cycle projection for you our members, safeguarding the financial stability of ERAPPA.

ERAPPA BUDGET
July 2023 - June 2024

REVENUE

Interest - Savings Account	835
Membership Dues	114,000
Annual Meeting Proceeds	30,636
Refund - ERAPPA Prog Support	-

Based on 3-year average. Will exceed if interest rates continue to rise or stay steady
Gross Dues; 95% of 3 year avg
Reflects smaller venue
Repayments are recorded against receivables and not actual revenue

Total Revenue 145,471

Operating Expense

Annual Meetings

Expenses and Travel	4,200
Host Committee Visits	1,000
Failed Meeting Expense	-
sub-total	5,200

6 committee members at \$700 ea; 3 yr avg \$640 each. No travel in two of those years.
previous 3 year average \$765. Includes 2 years of no visits. Local travel expected.
Not expected in 2023-24

Chapter Affairs

Travel - Chapter Meetings	-
Chapter Affairs Comm Mtg	7,200
sub-total	7,200

eliminated in 15-16, contact is made at MYM
9 committee members at \$800; 3 yr avg \$746 each. No travel in two of those years.

Membership

Membership Comm Mtg	9,000
ERAPPA Membership Initiative	4,600
sub-total	13,600

10 committee members @ \$900; 3 yr Avg is \$869 each
Last 3 yr avg is \$3,007, Board approved \$4,600 in July 2019 conference call

Administrative/Governance

Miscellaneous expense	1,000
Travel - ERAPPA Annual Mtg	-
Travel - APPA Annual Meeting	-
ERAPPA meeting expense	-
Printing & Postage	1,800
Marketing	3,500
Insurance	5,000
Incorporation	25
Board Meeting - Winter	15,000
Board Meeting - Summer	15,000
Board Meeting - Annual	20,000
Bank Fees	-
Accounting Fees	19,000
Software Fees	660
Dues collection (APPA)	11,400
Annual Meeting Expense	-
Commission & Service Fees (Travel)	-
Tele-Conference	-
sub-total	92,385

3 yr avg \$16,604. Ave. greatly affected by last year mistaken crediting of A.M. fees to ERAPPA.
3 year avg is \$0.00. No meeting in 2 of 3 years.
No longer APPA annual meeting travel requirements.
has not been historically used; eliminated
3 yr avg \$689; Increased for shipping of A.M. programs and financial records upon treasurer transition.
Now includes social media sub account. \$15,000 approved by board in 2022.
3 yr avg \$5108. FY 22-23 was 5,964 which spans fiscal years.
\$25 fee plus \$5 processing. No longer a processing fee since moving online.
3 yr avg \$14,059. (2020 & 2021 MYM canceled which is reflected in 3 yr average).
3 yr avg \$14,106 (2020&2021 summer meeting held fully or partially online.)
3 yr avg \$5,203; No meeting to attend in 2020&21. Accounts for travel cost to Canada.
No longer needed - \$0.00 budget
3 yr avg \$19,004
QuickBooks went from \$40/mth to \$50/mth in 21/22. Now \$60/month
10% of dues; 3 year avg \$13,156. Estimated at 10% of planned 22-23 dues.
Rarely used
Eliminated in 2018-19. Fees now included in costs for each meeting/committee.
Eliminated in fall 2020 FY. Using MS Teams instead.

Technology & Communication

Web Review & Development	5,500
Microsoft Office 365	2,255
Technology & Comm Mtg	8,250
ERAPPA Communication	1,000
sub-total	17,005

3 yr avg \$5,269
\$205/person for 11 people. Switch from Dropbox to MS Office 365
10 members @ \$825 per person. 3 year average \$546.50 per person.
3 yr avg \$617. Not used every year.

Awards/Scholarships

Scholarships - Leadership Acad.	34,000
Credentialing Scholarship	33,000
Ambassador Scholarship Top-up	-
Student Ambassador scholarship	-
Awards	5,000
sub-total	72,000

Assumes 8 scholarships @ \$4,000, plus \$2,000 buffer.
ERAPPA board voted in June 2023 to reduce CEFP coupons to 60 for one year for FY 23-24
New in 14-15 covering gap in Sponsor & Actual cost, not used last 3 yrs
eliminated; conference sponsorship opportunity
3 yr avg \$1948. No AM in 2020&2021

Professional Development

Misc P.D. Program Expenses	1,200
Major Update of PD Materials	-
Partners in Education Support	8,000
Professional Development Mtg	7,150
ERAPPA Program Support	-
Webinars	-
Toolkit sponsorship at Annual Meeting	-
ERAPPA A/M Grant	10,000
sub-total	26,350

\$1,125 in 2022-23 for AIA registration (annual registration)
request when needed
Ongoing support for speakers at Chapter meetings; 3 yr avg \$3,300
11 @ 650; 3 yr avg \$411 each
Rarely used
APPA cost now; was \$1,500 each; 4 per year
Board voted in 17/18 to eliminate starting with 2020 annual meeting
Grants paid for 2023, 2024, and 2025.

Total Operating Expense 233,740

3 year average \$239,495

Net

(88,269)

3 year average (\$24,843)

Atlantic Provinces Chapter

AAPPA

Craig Hickey, Chapter President
University of New Brunswick



Chapter Leadership

President	Craig Hickey	University of New Brunswick
VP Membership / Treasurer	David MacDonald	Dalhousie University
VP Professional Development	Kris Kierstead	New Brunswick Community College
VP Communications / Secretary	Tom Gilmore	University of New Brunswick

Chapter Governance

Following our AAPPA By-laws, the positions of VP Professional Development and President were up for renewal this year. Elections were held at our Spring Business meeting In June of this year. Incumbents for each position were un-opposed and Kris Kierstead was re-elected for a second term as VP Professional Development and Craig Hickey was re-elected for a third and final term in the position of President.

Chapter Events

In November 2022, our chapter was pleased to be able to return to hosting the annual Fall Conference for the first time since 2019. The Fall Conference, the main training and networking event for the chapter was a huge success with attendance numbers very close to those experienced pre-pandemic. In June 2023, the chapter held its annual Spring Business meeting, hosted by St. Francis Xavier University in Antigonish, NS. This meeting was well represented by many of our member institutions in person with a virtual option for those unable to attend in person. It was good to reconnect with many of our AAPPA colleagues.

Chapter Events Planned

AAPPA is pleased to host the rescheduled ERAPPA 2023 Annual Meeting in Saint John NB this September. The conference theme is "Vision" and will be held at the Saint John Trade & Convention Centre and Hilton Saint John. The various sub-committees of the host committee have been working hard over the past year to plan and prepare for what will be another successful ERAPPA Annual Meeting.

Membership

The Chapter's current Institutional membership is 17 total members. The chapter does not have a formal Business Partner Membership plan in place. Business Partners can become involved in chapter events by providing a sponsorship for the event. This has allowed the chapter to offer a no

fee registration to attend the spring meeting and keep the cost of attending the fall conference at a reasonable level.

Scholarships

For this year, AAPPa will be offering a total of 10 Ambassador Scholarships to for members of this chapter to attend the ERAPA Annual Meeting in Saint John, NB. The scholarship will cover the cost of conference registration for a member who either has not attended an ERAPPa Annual Meeting before or has not attended in the past 5 years.

Delaware Valley Chapter DVAPPA

Brett Fulton, Chapter President
Muhlenberg College



Chapter Leadership

President	Brett Fulton	Muhlenberg College
Vice President	Jeff Brown	Delaware Valley University
Past President	Andy Feick	Swarthmore College
Treasurer	Amber Donato	Moravian University
Secretary	Ryane Hoban	Villanova University
Technology Board Rep	Christi Muller Ford	Swarthmore College
Membership Board Rep	Vacant	
Professional Development Board Rep	Chris Andreozzi	Thomas Jefferson University
Business Partner Board Rep	Meaghan Finney	VMA Architects

ERAPPA Vice Presidents:

VP Member and Community Engagement	Andy Feick	Swarthmore College
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ERAPPA Committee Representatives:

Chapter Affairs	Brett Fulton	Muhlenberg College
Professional Development	Chris Andreozzi	Thomas Jefferson University
Technology and Communications	Christi Muller Ford	Swarthmore College

Chapter Governance

No bylaws or chapter changes have been presented. The Board has had some discussions about how to work with our wait list for Business Partners as we are heading towards ERAPPA 2024. DVAPPA is notably different in that our by-laws are structured to limit the number of Business Partners that are allowed to join and attend meetings. **This discussion has been strictly internal to up to this point.**

Chapter Events August 2022- August 2023

Board of Director Meetings & Conference Calls

- Planning Meetings:
 - **September 8th, 2022**
 - discuss upcoming meeting at Swarthmore
 - Conference Committees
 - **December 1st, 2022**
 - review awards if needed
 - finalize meeting plans for December 14th at Swarthmore

- discuss meeting at Valley Forge in March 2023
- **February 9th, 2023**
 - discuss open board positions
 - pick a June Meeting Date
 - Discuss membership fee increases
 - finalize meeting plans for March 1st, 2023
- **May 15th, 2023**
 - discuss June meeting
 - plan future meeting dates
 - track ERAPPA 2024 committees
 - discuss the business partner waiting list

Fall 2022 Chapter Meeting: December 14th at Swarthmore College. We toured the new dining hall facility and the new geo thermal heating plan for the college. This is very impressive and aggressive plan that is really ahead of many schools in the East. We also presented the Chapter awards at this time.

Spring 2023 Chapter Meeting: March 1st, 2023 at Valley Forge Casino and Hotel. We toured the facility to plan for our ERAPPA 2024 Conference and then had a brief business meeting.

Summer 2023 Chapter Meeting: June 14th, 2023 at Muhlenberg College. The architect and project manager presented a brief background regarding the new building Muhlenberg built on Campus. The Fahy Commons Building will be LEED Platinum Certified and will be one of only a few in the world that will have achieved Living Building Core Certification.

Chapter Events Planned 2023-2024

We are trying to plan a late fall / early winter chapter meeting in the Valley Forge area to begin to generate interest in the ERAPPA 2024 Conference.

We continue to focus on the planning and logistics for ERAPPA 2024 which our chapter is hosting in the fall of 2024.

Membership

Our Institutional Membership numbers have been steady. We are trying to develop ways to engage more of the institutional members. Our attendance at Chapter meetings has been good, but we would like to see a broader range of schools participate. We will continue to work at recruiting new members and are trying to reach out to K-12 schools as well as higher ed schools.

We continue to have great interest from our business partners and our waiting list has continued to hold steady. We are trying to go through and “clean-up” the list as some have been waiting for some time. As we do have some openings, we are seeking contacts to make sure the firms are still interested and willing to pay the membership dues. If we find they have lost interest or do not respond, we are then moving on to the next few names on the list and reaching out to inquire about the desire to become a member. This process has allowed us to bring in some new members that have been patiently waiting to become active in our Chapter.

Scholarships

We continue to provide scholarships for both CEFPP programs and APPA events. The CEFPP program seems to have declining interest. With new board members starting recently, we are hopeful that we can re-gain some interest in these programs.

Awards and Recognition

Chapter Champion Award: Amber Donato , Moravian University

Rising Star Award: Chris Andreozzi, Thomas Jefferson University

ERAPPA Emeritus Award: Tom Becker, Thomas Jefferson University (retired)

Andy Feick – past president, current ERAPPA Board Member

Keystone Chapter KAPPA

Randy Geering, Chapter President
Penn State Behrend



Chapter Leadership

President	Randy Geering	Penn State Behrend
1st Vice President	Mark Bodenschatz	Penn State Facilities Engineering Institute
2 nd Vice President	Erik Cagle	Penn State University
Past President	Scott Albert	Slippery Rock University
Treasurer	Shannon Giannoutsos	Carnegie Mellon University
Secretary	Shannon Wetzel	Carnegie Mellon University
Director	Jim Lewis	Cheyney University
Director	Brian Richards	Community College of Allegheny County
Director	Greg Black	Millersville University
Director T&C	Jim Miller	Sewickley Academy
Business Partner	Cristina Roth	Stahl Sheaffer Engineering

ERAPPA Committee Representatives:

Chapter Development	Randy Geering	Penn State Behrend
Prof. Development	Greg Black	Millersville University
Prof. Development	Cristina Roth	Stahl Sheaffer Engineering
Membership	Brian Richards	Community College of Allegheny County
Technology	Erik Cagle	Penn State University Park

Chapter Governance

KAPPA had three open positions to fill this year. Second Vice President, Treasurer, and a Director. Greg Black and Shannon Giannoutsos agreed to run for re-election and Erik Cagle accepted the nomination to run for Second Vice President. All three candidates were unanimously elected.

Chapter Events

Board of Directors meetings are scheduled between our bi-annual meetings and are used to plan the upcoming meetings and conduct organizational business to continue to better the chapter.

KAPPA's Spring 2023 meeting was hosted by Saint Frances University at the Bedford Springs Resort in Bedford Springs, Pennsylvania on April 4th and April 5th. We had over 200 attendees, of which 61 were institutional members. We still have work to do to increase this number, however, we were pleased with the total number of attendees. The keynote speaker was Stormy Friday who presented – *"The new Frontier in FM for Institutions of Higher Education and*

Corporate Partners." We incorporated some round table discussions on current hot topics such as Campus resiliency, inventory asset management and sustainable design approaches to reduce operating costs. One of the highlights of the conference was networking by the fireplace in the evening. The feedback from the conference attendees was very positive.

Chapter Events Planned 2023-2024

The fall 2023 meeting will be held October 24-25, 2023, at the Doubletree in Cranberry PA. The spring 2024 meeting location is still to be determined.

Membership

While attendance was not quite back to historic levels at our spring 2023 meeting in Bedford Springs, we have seen a 65% increase in our institutional member attendance since we started face to face meetings. Director Richards has also been reaching out to institutional members that haven't participated recently and is encouraging them to re-engage. Our business partner attendance/support continues to be very strong.

Scholarships

KAPPA offers the Norman H. Bedell Annual Scholarship (2) towards the many professional development opportunities that APPA offers and scholarships (2) to attend the ERAPPA Annual Meeting. Applications for scholarships are available on our web site. Winners will be recognized at our fall meeting this year.

Major Initiatives

Membership: The chapter continues to promote institutional membership growth as well as further expand our business partner relationships.

Educational Needs: The Chapter continues to provide informative speakers to our membership and diligently searches for relevant keynote speakers for our sessions.

Areas of Concern

Our chapter strives to provide affordable meetings that offer exceptional value for networking with business partners and institutional members. The chapter continues to search for new and creative programs to engage our members and develop new professional relationships. It is imperative that we keep our meetings affordable for our members, given the budget challenges our members are facing due to declining enrollments.

Chapter Finances

While we did incur a loss at our spring conference, which was to be expected, the chapter's financial position continues to remain strong. We anticipate that based on our 10-year budget plan, which was developed in 2019 that we are in good shape financially through at least 2030.

MARYLAND-DC CHAPTER MD/DC APPA

Mary Grube, Chapter President
St. Mary's College of Maryland



Chapter Leadership

President	Mary Grube	St. Mary's College of Maryland
Vice President	Quajalyn Amos	University of Maryland College Park
Past President	Sheri Vucci	Smithsonian Institution
Treasurer	Jason Sawyer	Smithsonian Institution
Secretary	Colleen Kirby	Salisbury University
Director at Large	Kelly Geishauser	The Catholic University of America
Director at Large	Darryl Williford	Bowie State University
Director at Large	Brad Newkirk	St. Mary's College of Maryland
Director at Large	Michael Dixon	University of Delaware
Director at Large	Jonathan Cooper	Salisbury University
Director at Large	Vacant	
Business Partner Member	Vivica Williams	ArchScan

ERAPPA Representatives:

President	Sheri Vucci	Smithsonian Institution
VP Technology	Jason Sawyer	Smithsonian Institution
VP Professional Development	Mary Grube	St. Mary's College of Maryland

ERAPPA Committee Representatives:

Chapter Development	Mary Grube	St. Mary's College of Maryland
Professional Development	Quajalyn Amos	University of Maryland College Park
Member & Comm. Engagement	Darryl Williford	University of Maryland College Park
Technology & Communications	Brad Newkirk	Smithsonian Institution

Chapter Governance

Bylaws were last revised September 2022. No changes since the last report. We are currently in the process of reviewing our bylaws to potentially make changes to the scholarship section.

Chapter Events August 2022 – July 2023

Board of Director Meetings & Conference Calls

- Planning Meetings:
 - January 4 & 5, 2023 - Planning Meeting to visit meeting site and plan for summer meeting.
- Conference Calls (August 2022 – July 2023)
 - Monthly – 1pm on the first Monday of each month

Fall 2022 Educational Program – Was hosted at Morgan State University in Baltimore MD on Monday, November 7, 2022.

Spring 2023 Educational Program – Was hosted at St. Mary’s College of Maryland in St. Mary’s City MD on Friday March 3, 2023

NFM&T Annual Conference. The Chapter is annually invited to host a free booth at the National Facilities Management & Technology Expo (NFM&T) in Baltimore, Maryland. Board members staff the booth in shifts for 3 days attempting to recruit new members and make others aware of the entire APPA organization. MD/DC APPA participated in the show with a free booth March 21, 22 and 23.

2023 Annual Two-Day Chapter Educational Program. The Chapter held its’ two-day program June 29 and 30, at Turf Valley Resort. We continued our success from last year and again expanded it to include a Supervisors Toolkit session, which started one day early. We had 87 attendees. In addition to the supervisor’s toolkit session, we did a session on Diversity, Equity and Inclusion over the two days.

Chapter Events Planned 2023-2024

Fall Educational Program: The Chapter is planning its fall one-day event for October 20, 2023 to be held at Montgomery College.

Spring 2024 Educational Program: Date is TBD, location is tentatively Carroll County Community College.

2024 Annual Two-Day Educational Program. June 13 & 14, 2023 at Turf Valley Resort

Membership

Our Institutional Membership numbers are holding steady. We continue to work at recruiting new members including K-12 and community colleges, and re-engaging institutions that have declined in participation. The majority of our attendees and members come from board member institutions.

Scholarships

Presently, three MD/DC scholarships are awarded each year, selected from the pool of applicants generated by the ERAPPA scholarship process. Scholarships can be used for the APPA Institute, Leadership Academy, Supervisors Toolkit, and the APPA Credentialing Program.

Awards and Recognition

Nothing to report.

Major Initiatives

Membership. The Chapter continues to develop membership by establishing personal contacts and

engaging institutions within the MD/DC region.

Educational Needs. The Chapter strives to provide meaningful educational topics for members and strives to be a resource for its members.

Scholarships. The Chapter is taking a hard look at better ways to provide scholarship opportunities to our membership.

Technology. No new technology initiatives.

Major Areas of Concern

None at this time.

New Jersey Chapter NJAPPA

Amy Baker, Chapter President
New Jersey Institute of Technology



Chapter Leadership

President (6/23-6/25)	Amy Baker	New Jersey Institute of Technology
President-Elect	Joshua Johnson	Mercer County Community College
Past President	Earl Farrell	Montclair State University
Director of Membership	Tawanda Thomas	Rutgers, The State University of NJ
Director of Technology	Gus E. Bing	Princeton University
Director of PD	John Argento	Princeton University
Treasurer	Walter Eddy	Rider University
Secretary	Stephanie McCormick	Drew University
Director at Large	Rajandra (Raj) Shah	Montclair State University
Director at Large	Joh Pereira	Rutgers, The State University of NJ
Business Partners	Christine Messina	All Risk Inc.
Business Partners	Susan Maddalena	Zack Painting
Business Partners	David Cole	Colliers Engineering

ERAPPA Committee Representatives

Chapter Development	Amy Baker	New Jersey Institute of Technology
Professional Development	John Argento	Princeton University
Technology and Comm.	Gus E. Bing	Princeton University
Member/Community	Tawanda Thomas	Rutgers, The State University of NJ
Business Partners	Christine Messina	All Risk, Inc.

Chapter Governance

No changes since the last report.

Chapter Events 2022 - 2023

Monthly Board Planning Meetings

- June 9, 2022 (at Montclair State University)
- July 21, 2022 (conference call)
- August 2022 (canceled)
- September 15, 2022 (conference call)
- October 20, 2022 (at Mercer County Community College)
- November 17, 2022 (conference call)
- December 9, 2022 (Holiday BM and Luncheon, McCloone's Boathouse)
- January 9, 2023 (conference call)

- February 16, 2023 (conference call)
- March 9, 2023 (conference call)
- April 5, 2023 (conference call)
- May 11, 2023 (conference call)
- June 15, 2023 (at Mercer County Community College)
- July 13, 2023 (1st Annual Board Planning Retreat, at New Jersey Institute of Technology)

Member-Focused Educational Events:

- **June 9, 2022:** Spring General Membership Meeting, Montclair State University, (2) PD Sessions (PSU & UMASS)
- **October 20, 2022:** Fall General Membership Meeting, Mercer County Community College, (1) PD Sessions (Trusted Partners)
- **March 29 – 31, 2023:** 14th Annual Spring Conference, Seaview Resort, Galloway Twp., NJ, Keynote & sessions by Phill Van Hooser and Bergen CC, and Facilities Jeopardy.
- **June 15, 2023:** Spring General Membership Meeting & Board Elections, at Mercer County Community College. (2) Member PD sessions (Team PAR and Green Building Center).

Recap of Member Education Events:

Spring General Membership Program: June 9, 2022, the Spring General Membership meeting will be held at Montclair State University. The meeting was well attended by approximately 110 participants. Topics included:

- **“Marketing and positioning your Facilities Organization for building successful customer relationships”** presented by: Melissa Bergeron, Assistant Director Operational Services, University of Massachusetts, SNEAPPA Chapter) & Erik Cagle, Manager, Custodial Operations, Penn State, KAPPA Chapter
- **“Deferred Maintenance Assessment: A paperweight or an executable plan? Swarthmore College’s success story.”** presented by: Andrew Feick, Assoc. VP Sustainable Facilities Operations & Capital Planning, Swarthmore College, DVAPPA Chapter

Fall General Membership Program: October 20, 2022 at Mercer County Community College. The meeting was well attended by approximately 100 participants “Building Trust in Educational Facilities Management,” presented by: Trusted Advisors

- **Session 1: Trust & Trustworthiness**

This session lays the groundwork for becoming more successful professionally and personally in a real, authentic way. Participants learn how trust really works and explore the elements of trustworthiness using our core trust model, the Trust Equation, with a focus on practical trust-building behavior. Participants create a personalized action plan to build trust in a current professional relationship on their own.

- **Session 2: The Trust Principles**

This session introduces four trust principles as guideposts for action. Using scenarios based on common challenges, participants explore – through role-play and/or discussion exercises – how applying the trust principles can help resolve issues quickly and create win/win outcomes for educational facilities managers and business partners.

- **The four trust principles are:**

- A focus on the other

- A habit of collaboration
- A medium- to long-term relationship perspective
- A default to transparency

14th Annual Spring Conference: March 29 – 31, 2023, Seaview Resort, Galloway Twp., NJ, Keynote & sessions by Phill Van Hooser and Bergen CC, Facilities Jeopardy, and Sr. Leadership Roundtable. This was a first in-person, multi-day conference since 2019. The meeting was well attended by approximately 112 participants. We instituted a membership drive during this period, which was successful, and helped us regain and reengage members we lost through the pandemic, in addition to recruiting new members. Costs were significantly higher and will need to be reevaluated in 2023.

- **Keynote Speaker -- Phil Van Hooser**

Too Busy for Details: *Stories & Strategies to Solidify Leadership Connection*

You will learn:

- Why your people want authentic connections and how to establish them
- How active listening and honest communication build greater respect, trust, and relationships
- The all-too-common “sins” which destroy leadership influence
- The commandments impactful leaders habitually practice

- **Breakout Session – Phil Van Hooser**

Be Heard: *The Questions and Answers That Get You More Than You Ask For*

You will learn to:

- Command the interest of decision-makers
- Demonstrate your capabilities and credibility
- Earn a voice in future conversations and decisions
- Increase access to key players through growing influence and authority.

- **Session I: “Bergen Community College One-Stop: Innovative Space Utilization Meets Efficient Design.”**

When the Pitkin Education Center was constructed in the 1960s, it was a shining example of modern contemporary design. Flash forward six decades and the building reflected outdated ideas for both space utilization and the delivery of efficient student services. The solution: a reimagined “One-Stop” student center, replacing a 1960s-era labyrinth design with modern stainless steel, wood, and glass to create an open, sunlit-drenched space housing every student function. The 14,280-square-foot project, costing \$2.6 million, relocated every student services function – including admissions, registration, the bursar, financial aid, and more – into an all-inclusive environment.

Presented by:

- **Nathaniel Saviet**
Vice President of Facilities
Bergen Community College
- **Dr. AJ Trump**
Vice President of Student Affairs
Bergen Community College
 - **Anthony Iovino, AIA, PP, LEED**
Principal, Arcari + Iovino Architects

- **Session II: Sr. Facilities Leadership Roundtable**

Hear from our NJ Sr. Facilities Administration and Operations Leaders during this lively discussion encompassing today's hot topics.

Participants included:

- **Sharon Blanton**
Vice President for Operations
The College of New Jersey
- **Donald M. Hudson, AIA**
Senior Vice President, Facilities & Operations
Stockton University
- **Robert Maffia, PE**
Vice President for Facilities and Campus Operations
Stevens Institute of Technology
- **Michael Reca**
Vice President for Facilities and University Operations
Rider University
- **David C. Schulz, AIA, PP, AUA**
Vice President / University Architect
Institutional Planning and Operations
Planning, Development, and Design,
Rutgers, The State University of New Jersey
- **Andrew Christ, PE (Moderator)**
Senior Vice President, Real Estate and Capital Operations
New Jersey Institute of Technology

Spring General Membership Meeting & Board Elections: June 15, 2023, at Mercer County Community College. Momentum continued from the Spring Conference, and attendance was at approximately 90. Educational programs included:

- **“Maximize Sustainability with a LEED for Campus Approach and/or WELL Portfolio”**
Presenters: Jason Kliwinski and Lia Nielsen, Green Building Center
 - Many are familiar with the LEED (Leadership in Energy and Environmental Design) rating system for major renovations, new construction and existing buildings. LEED has been helping clients reduce environmental impacts while improving human health for two decades. Certification is not easy and significant documentation is required to achieve it at any level.
 - **LEED for Campus** provides a way to get groups of pre-requisites and credits preapproved across your portfolio related to the sustainability of your campus so that any individual building project can use them in the future on a certification without having to submit any additional information. Similarly, the **WELL Building Standard** offers a Portfolio Program and a condensed version through the WELL Health and Safety Certification. While LEED focuses more heavily on reducing carbon footprint, WELL focuses specifically of the impact of the built environment on human health and well-being, In a post-Covid world, this is equally as important as reducing Climate Change impacts.
 - This session will give an overview of the LEED for Campus Approach, WELL Portfolio and WELL Health and Safety Certifications, how they may help increase the sustainability of your portfolio and the benefits to using these frameworks to manage your campus sustainably.

- **“The Five Pillars of Student-Centric Design”**
Presenter: Karen Rossilli-Kiefer, FMP, Michael P. Zulla, CEFM, Lia Acevedo, and Kelly Dall, AISD, from TeamPar
- This presentation will leave Directors with an understanding of what the five pillars of Student Centric Design are (and can mean to their university) and why the incorporation of these principles into the built environment will engage students and promote on-site learning. You will leave with a better understanding of these learning objectives:
 - Placemaking Design - How to design incorporating color theory, community, and culture.
 - Importance of classroom mobility and collaborative spaces and the psychological impacts of each.
 - Biophilic Design - The emotional and performance benefits of bringing the outdoors inside.
 - The Multiple Intelligence Classroom- how design can facilitate many learning opportunities.
 - Acoustical Impacts of the built environment – how to design and build with IIC/STC ratings and ambient noise reduction in mind.

Supervisor’s Toolkit. None were planned for 2022 - 23.

Chapter Events Planned 2022 – 2024:

- **Fall Educational Program:** October 28, 2023 @ Princeton University. The Princeton Capital Team will present their current capital plans and ongoing design and construction projects. A campus tour will take place, led by different areas of facilities management including design, facilities management, maintenance/custodial.
- **15th Annual Spring Conference:** March 20 – 22, 2024 @ Seaview Resort. The program has not yet been developed. We hope to repeat the Sr. Leadership Roundtable and make it an annual event. It was very successful. Team Building will be brought in-house and developed by the Board in lieu of outsourcing for significant cost.
- **Spring General Membership Meeting:** Location TBD and content to be development.
- **Supervisor’s Toolkit:** None were planned for 2022 - 23. Discussions are taking place to bring this back. No timeline is predicted at this time.
- **Institutional Member Only Meeting(s):** Discussions regarding potential tours conducted by BP membership.
- **Networking Events (2) Annually:** This topic came out of our 1st annual planning meeting. The BP reps will form a subcommittee to discuss with BP members and create an action plan. This is still in its infancy with no projected timeline for implementation.

Upcoming ERAPPA Annual Conference & Exhibit 2020+3, St. John, New Brunswick CAN

NJIT will be attending the annual conference (3 attendees). It is uncertain if other Board institutions will be in attendance.

Membership

Our Institutional Membership numbers are stable. We continue to work at recruiting new members including community colleges. We are focusing on trying to encourage more of our institutional members to join the NJAPPA Board. This recruitment effort was successful, and I am happy to report

that we are at full-Board capacity for the first time in several years. Our Business Partner Membership is strong and extremely supportive of NJAPPA and our mission. We are continuously working to get both EDU members and BP members to pay their dues, but have initiated a staggered cycle to ease the burden on our membership committee volunteers. BP members will renew on a calendar year, and EDU members on a fiscal year.

Scholarships

2022: (4) NJAPPA Scholarships were awarded for the annual ERAPPA conference.

2023: (4-5) NJAPPA Scholarships are planned for release to attend the ERAPPA Annual Conference.

Guidelines: A maximum of five (5) Scholarships will be awarded for the ERAPPA 2023 Conference. Scholarships will be awarded to applicants meeting qualifications on a 'first come, first served' basis. A maximum of two (2) scholarships may be awarded per institution, and only to those who have not received a scholarship in the last 5 years.

Amount: Each scholarship awarded will be made up to the amount of \$1200, which is sufficient to cover the registration fee and some additional travel/hotel expenses. NJAPPA will pay for awardees registration directly. Hotel and travel will be reimbursed AFTER the conference with submission of a reimbursement form and all receipts. Special circumstances will be addressed as necessary, but only with prior approval.

Awards and Recognition

At our Spring General Membership Meeting we recognized Earl Farrell for his contributions to our chapter during his presidency term. Earl was also nominated for the ERAPPA Chapter Champion award.

Major Initiatives

1st Annual Board Planning Retreat: July 13, 2023, at New Jersey Institute of Technology. The theme established was: ***Rethink, Rebuild, Reimagine, Review***. It is planned that this will be an annual, ½ day event conducted by the incoming President, with a follow-up in the 2nd year of their term. The following initiatives were discussed at length, and an action plan was started:

- 1) **Revenue: (Rethink)**
 - a) Annual operating costs
 - b) Fall/Spring membership meeting costs
 - c) Spring Annual Meeting Cost 2023
 - i) Goal for 2024
 - d) Cost to attend meetings
 - e) Sponsorship Options
 - f) Annual BP sponsorship opportunities
- 2) **Membership: (Rebuild)**
 - a) Maintenance and management process
 - b) Growth and Recruitment
 - c) Business Partner Benefits

- d) Support
- 3) **Professional Development (Reimagine)**
 - a) Seeking Presenters
 - b) Library of presentations
 - c) Meeting & Conference Planning
 - d) Post-COVID environment – What we have learned
 - e) Virtual offerings – Webinars, Leadership Presentations
 - f) Support
- 4) **Technology (Review)**
 - a) Functionality
 - b) Resources
 - c) Business Partner Recognition
 - d) Support

Northern New England Chapter NNECERAPPA

Tom Baker, Chapter President
Norwich University



Chapter Leadership

Tom Baker	Norwich University	President
Doug Cosentino	Colby College	Vice President
Bryan Coady	St Paul's School	Secretary/Treasurer
Devin Collins	Southern New Hampshire	New Hampshire State Director
Mike Fox	Bates College	Maine State Director
Karen Lemire	University of Vermont	Vermont State Director
Jessica Picard	University of Maine	Ex-Officio/Past President

Committee Chairs:

Tandra Boilard	Phillips Exeter Academy	Membership Chair
Doug Plummer	Kimball Union Academy	Outreach Coordinator
Tim Pratt	Bates College	Professional Development Chair
Rory Early	Phillips Exeter Academy	Business Partner Chair
Billy Gagnon	University of New Hampshire (ABM)	Technology Chair
Anita Bailey	Retired	Emeriti Chair
Larry Ignataro	Competitive Energy	Business Partner Liaison

ERAPPA Committee Representatives

Chapter Development	Tom Baker
Professional Development	Tim Pratt
Member and Comm. Engagement	Tandra Boilard
Technology & Communications	Billy Gagnon

Chapter Governance

No changes in chapter governance this year

Chapter Events in 2023

Board Meetings & Conference Calls

- In-Person Conference March 9-10, 2023, at St. Paul's School (NH)
- In-Person on Board Meeting July 16-17, 2023
- Conference Calls: Calls are held monthly.

Confirmed Chapter Events Planned 2023

- Conference tentatively scheduled for March 28-29, 2024, at Colby College

Membership

Our Institutional Membership numbers are holding. We continue to work at recruiting new members including K-12 and community colleges.

Scholarships

Up to \$30,000 in scholarships may be given out to APPA, ERAPPA and NECERAPPA events

Award and Recognition

The Chapter continues to recognize long-term attendees through its pin recognition program. Recognitions are for 5 year, 10 year, 15 year, and 20+ year increments. An “Emeritus” status is also recognized.

Major Initiatives

Membership: The Chapter continues to develop membership by establishing personal contacts through Business Partners and institutional members

Educational Needs: The Chapter ensures cutting edge sessions, and strives to provide AIA and other professional CEUs for the sessions. We are attempting to promote 1 to 2 educational drive-ins per year with our business partners.

Technology: The chapter continues to update and refresh our webpage as needed.

Major Areas of Concern

- Membership
 - Ability to travel
 - Training budgets
 - Ability to hold in person events
 - Overall institutional fiscal viability
- Business partners
 - Advertising budgets
- With long-term volunteers exiting the organization we need to become more diligent about outreach for volunteers and new members.

New York Chapter NYAPPA

Rex Giardine, Chapter President
SUNY ESF



New York Chapter

It is important to note that at a joint SUNY-PPAA/NYAPPA Summer 2023 Conference a formal vote was taken among all of the attending State University of New York (SUNY) Institutions to merge the SUNY-PPAA organization fully into NYAPPA. This discussion had been on and off within both organizations for some years but had gained considerable traction at the ERAPPA 2022 conference. The ensuing months were used by the leadership within SUNY-PPAA to communicate the initiative across the State and define the format for each institution voting on this important decision. The formal vote to merge was nearly unanimous.

Chapter Leadership

President	Rex Giardine	SUNY ESF
1 st Vice President	Gary Goss	College of St Rose
2 nd Vice President	Ellen Chase	Cornell University
Secretary	Zach Newswanger	SUNY Albany
Treasurer	Kimberly Nelson	SUNY New Paltz

There are additionally: Eight Board Director Positions and Eight Alternate Director Positions

ERAPPA Committee Representation:

Annual Meetings	George Stooks	St John Fisher College
Professional Development	Juanita Larabee	SUNY Cortland
Technology & Communications	John Moore	Rochester Institute of Technology (RIT)
Member & Comm. Engagement	Gary Goss	College of St Rose
Business Partner Liaison	Nick Cerro	C&S Engineering

Chapter Governance

- Throughout the fall of 2023 we will be meeting regularly to confirm the post-merger legal and financial details and named Board Members and that all vacancies are filled.

Chapter Events

- The ERAPPA 2022 Conference at Turning Stone represented the first in-person event since 2019.
- Winter Conference - January 30 – February 1, 2023 Saratoga, New York with over 175 participants
- Summer Conference - July 11 - 13, 2023, Rochester, New York with over 300 participants
- Fall Meeting – During ERAPPA September 25, 2023 or Subsequent via Zoom

- Monthly Zoom meetings as being held as NYAPPA and prior SUNY-PPAA leadership resolve merger details, fill board, alternate board positions and conference committees.

Chapter Events Planned Through 2024

- Winter Conference February 5 – 7, 2024 Saratoga, New York
- Summer Conference July 15 – 18, 2024 Poughkeepsie New York

Membership

- Discussion has been started with New York State’s Downstate Institutions (New York City and all surrounding areas) about supporting the creation of a robust sub-chapter to host local events and how each area’s unique strengths and demographics can support, promote, and bolster NYAPPA as a whole.
- The premise is that initiative and events whether upstate or Downstate are equally communicated across the entire State and institutions regardless of location are welcome and encouraged to attend and participate.
- We are exploring how Business Partners may provide inroads and insights to reach campus facilities leadership at institutions who rarely if ever participate and may benefit from what NYAPPA and ERAPPA offer. The challenge is reaching key stakeholders at the campus level where contact information is often unpublished.

Scholarships

- Discussion of expanding scholarships targeting especially first time institutional attendees and Business Partners as another value added avenue for them.

Major Initiatives

- Half Day Drive-In Workshops being considered at strategic campuses across the State that rarely host events to bring opportunities for no cost educational content sufficiently close to our membership’s doorstep.
- Growing Business Partner Diversity within NYAPPA
- Working with Business Partners to develop meaningful training and marketing help to grow membership.
- Further development of the website.

Areas of Concern

- Events will need to be continuously evaluated to determine if cost/location, content and duration are in the right proportion and appropriate to keep robust attendance and participation of sponsor business partners to manage value and costs to attend.
- Travel Budgets at the Campus level are regularly limited.
- While previously we were challenged to engage a sufficient number of facilities professionals to serve in chapter leadership, board and committee roles, as a result of the SUNY merger we have a more diverse and robust pool.
- Hiring quality employees in a shrinking talent pool.

- Shrinking population coming out of K-12 and more intense competition with other Colleges and Universities

Business Partner Relationships

- We have had a very engaged year with Business Partners planning and leading up to ERAPPA 2022. They bring fresh outlooks and ideas to further our training line ups and deliveries.
- We plan to onboard additional Business Partners and establish a regular duration and rotation for their terms.

Finances and Chapter Dues

- The NYAPPA financial position remained strong after a successful 2022 ERAPPA Conference and stronger yet as SUNY-PPAA funds are merged. As the chapter does not collect membership dues, the only significant source of revenue was that generated through the ERAPPA conference, now coupled with the traditional winter and summer conferences that our SUNY colleagues previously organized. Our long-term financial plan is to draw down this retained equity to deliver and support professional development within our chapter. We have healthy investments to help sustain our organization.

ONTARIO CHAPTER OAPPA

Scott Johnstone, Chapter President
Brock University



Chapter Leadership

President	Scott Johnstone	Brock University
Past President	John Witjes	Queen's University
Vice-President	Stepanka Elias	University of Waterloo
Secretary	Alp Amasya	Toronto Metropolitan University
Treasurer	Ron Ogata	York University
Energy Committee Chair	Nathan Splinter	Queen's University

ERAPPA Committee Representatives:

ERAPPA Board	Hugh Briggs	Lakehead University
Technology & Communications	Vacant	
Chapter Development	John Witjes	Queen's University
Professional Development	Stepanka Elias	University of Waterloo
Member & Comm. Engagement	Ron Ogata	York University

Chapter Governance

In June of 2023, elections were held for the President, Vice-President and Secretary positions. Scott Johnstone was elected as President, Stepanka Elias was elected as Vice President, Alp Amasya was elected as Secretary, and Ron Ogata agreed to continue on as Treasurer. John Witjes stepped down from the President position and agreed to continue as Past President. The Committee expressed appreciation to Hugh Briggs for his continuing OAPPA support as President for a three-year term and as Past President for the last two years.

Chapter Events

- OAPPA Directors
 - April 27, 2022 – ZOOM meeting
 - June 2, 2022 – Annual General Meeting - ZOOM meeting
 - August 31, 2022 – ZOOM meeting
 - September 22, 2022 - Quarterly Business Meeting hybrid meeting
 - November 23, 2022 – ZOOM meeting
 - December 6, 2022 - Quarterly Business Meeting hybrid meeting
 - January 25, 2023 – ZOOM meeting
 - March 29, 2023 - Quarterly Business Meeting hybrid meeting
 - April 26, 2023 – ZOOM meeting
 - June 2, 2023 – Annual General Meeting hybrid meeting

Membership

- Membership is stable and the participation rate is very good. Meeting frequencies have increased beyond the quarterly business meetings to include virtual monthly one-hour check-ins at the request of the membership.
- OCFMA (Ontario colleges) and OAPPA (Ontario universities) continue to hold joint Energy Committee meetings.
- This year OCFMA and OAPPA are looking at how PD events can be adjusted to meet both the needs of the colleges and universities.
- OAPPA has established several working sub-committees that continue to be active and inform the membership on key OAPPA issues.

Scholarships/Awards and Recognition

A nomination for Chapter Champion was submitted for selection in 2023

Major Initiatives

- a. COVID 19
 - i. Covid continues to be a concern although with some universities migrating back to pre-Covid practices and protocols. Preparation for the fall academic year and COVID related challenges throughout the year continued to be discussed at regular meetings
 - ii. Meeting frequency increased to monthly at the request of membership heading into the academic year
 - iii. Ventilation and cleaning standards primary topics of discussion and concern.
- b. Deferred Maintenance Facility Condition Assessment Program (FCAP)
 - i. Selected new vendor for assessments using OECM <https://oecm.ca>
 - ii. Worked with OCFMA to standardize our datatype
 - iii. Provide Ontario Government MCU with updated data on FCAP
 - iv. FCAP committee active to revitalize our data
 - v. Membership actively working with new vendor
 - vi. New database was engaged in September of 2022 with data reconciliation efforts completed in early 2023.
- c. Government Reporting
 - i. Energy reporting to various government ministries
 - ii. Asset inventory of all buildings continuing on an annual basis
- d. Lobbying the Ontario government on a number of issues:
 - i. Changes to the Waste and Recycling regulations
 - ii. Changes to the Boiler and Pressure Vessel regulations
 - iii. Changes to the definition of Class A accounts for electricity use
- e. Education
 - i. Professional Development team members leading efforts to reinvest chapter money into education of membership including efforts to revise Supervisor's Toolkit and monthly lunch and learns. Two Supervisor's Toolkit sessions were held in early 2022 for

OAPPA membership and the sessions were very well received. Additional sessions are planned for 2023.

ONTARIO COLLEGE FACILITIES MANAGEMENT ASSOCIATION

OCFMA

Tim Schill, Chapter President
Conestoga College



Chapter Leadership

Chair	Tim Schill	Conestoga College
Chair Elect	Henry Colyn	Mohawk College
Past Chair	Vacant	
Secretary	Robin Gould	Confederation College
Treasurer	Brent Thomas	Lambton College
Energy	Paul Cochrane	Lambton College

ERAPPA Committee Representatives

Professional Development	Lan Chi Nguyen Weekes	Le Cite College
T&C Committee	Colleen McArthur	Algonquin College
Member and Comm. Engagement	Kathryn Brubacher	Conestoga College

Chapter Governance

The Chapter's new Terms of Reference have been completed and approved by the membership. With the new TOR there have been positions added to the executive as listed above. With elections at our AGM all positions have been filled.

Chapter Events

OCFMA holds its annual PD session and AGM each spring. This past year's event was hosted May 29-31 by Le Cite College in Ottawa. Topics included staff "Back To Campus" Strategies and "Work Location Initiatives", Sustainable design as it relates to the Parliament Building Centre block renovations, Deep Energy Retrofit on Heritage Buildings. Space Planning For The New Curriculum Delivery, Presentation on the new ASHRAE Design Guidance for Education Facilities: Prioritization for Advanced Indoor Air Quality and a round table discussion of various topics. We continue our bi-monthly meetings virtually and plan to begin in person at our October meeting.

Membership

The majority of Colleges renewed their membership for 23/24. Part of the reason some were not renewed is that there is a large turnover of Facilities department leaders at the Colleges and the renewal doesn't get to the right person. Even if the renewal gets to the right person some are unaware of APPA/ERAPPA because they come from other sectors. We have been making it a point to educate new leaders and advocate for membership in APPA/ERAPPA. Because the Colleges and Universities in Ontario are government funded was are unable to have business partners.

Scholarships

Scholarships is not something OCFMA currently does but I will bring this idea up to the executive to see if there is any interest.

Initiatives

Now that we have filled our executive committee and committee Chairs, we will work to get more people involvement in these committees to spread the work around and keep ideas fresh. Our T&C committee continue to be engaged and continue to provide better ways to collaborate and share ideas and best practices.

Areas of Concern

Membership and involvement has always been an area of concern. This is in part due to the turnover of Facilities leaders in our sector but also reflective of the workload these leaders bear at their institutions. We are encouraging the leaders at the institutions to have as many of their staff as possible to get involved on subcommittees.

Finances

All members pay annual dues to the chapter. Fortunately collecting dues has never been an issue so the chapter is in good shape financially. The dues collected allows us to arrange and pay for sector PD sessions, speakers, hire consultants, upgrade software/technologies etc.

SOUTHERN NEW ENGLAND CHAPTER SNEAPPA

Melissa Bergeron, Chapter President
UMASS, Amherst



Chapter Leadership

President	Melissa Bergeron	UMass, Amherst
Vice President	Jean Robinson	UMass, Lowell
Secretary	Jayson Davis	Bridgewater State University
Treasurer	Keith Woodward	Quinnipiac University
Past President	Patricia Whitney	Framingham State University
CT State Rep	Jessica Abbott	Wolcott Public Schools
MA State Rep	Howard Larosee	Massachusetts College of Art
RI State Rep	Karl Calvo	University of Rhode Island
<u>Representative at Large</u>		
Webmasters	Peyton Gibson	University of Rhode Island
Business Partner Liaison	Norm Young	Norm Young Consulting Services (NYCS)

ERAPPA Committee Representatives:

Chapter Development	Melissa Bergeron	UMass, Amherst
Prof. Development	Jerry Santos	Bridgewater State University
Member & Comm. Eng. Technology	Glen Mathieu	University of Connecticut
	Peyton Gibson	University of Rhode Island

Chapter Governance

This past year we updated our bylaws to officially recognize the position of Business Partner position in Chapter Leadership. We also made a change to the bylaws so that proposed changes could be emailed instead of physical mailed before voting. These changes were voted on in our November meeting and passed.

Bylaws are currently under review for potential future revisions including adding the ERAPPA Committee Representatives as official members of the leadership board.

Board meetings were held monthly via zoom. Board meeting are held in person at our chapter meetings (November, March, and June). Annual elections were held in person at our June 2022 meeting in Quinnipiac University.

Chapter Meetings in 2022-2023

The Chapter typically holds 3 meetings per year - spring, summer and fall. Chapter meetings begin around 8am with registration, continental breakfast, and networking. Before the educational portion of the program begins, the Chapter President and other Board Members provide business

related updates. Two educational sessions along with additional networking are provided before lunch, followed by tours of the hosting campus or venue. Our meeting usually adjourns by 2:30pm.

11/3/2022 –Tennis Hall of Fame, Newport, RI – Educational sessions included UMass Lowell’s work towards carbon neutrality and a session on gender inclusive restroom design. The tour offered was of the Tennis Hall of Fame grounds maintenance program

3/15/2023 – UMass Medical School, Worcester MA – Educational sessions included operational efficiencies in design, UMass Medical Co-Gen power plant, and UMass Medical decarbonization planning. The tour offered was of the new lab building and of the co-gen power plant.

6/7/2023 – Massachusetts Maritime Academy, Buzzard’s Bay, MA – Educational sessions included: a panel discussion on designing and maintaining STEM facilities, and developing facilities leaders. The tour offered was of the campus.

Upcoming Chapter Events

November 2023 – University of Connecticut

March 2024 - New England Air Museum

June 2024 – University of Rhode Island

November 2024 – University of Massachusetts Lowell

Membership

We continue to reach out to our constituency in an effort to provide educational programs that are relevant to our everyday professional responsibilities. Our attendance has risen over this year to close to pre pandemic numbers. We are finding that we have more business partner attendees than educational member attendees at our meetings. WE are working to develop stronger programing to shift those numbers.

Scholarships and Awards

The Joseph D. Rubertone Scholarship Program offers up to four (4) \$2,000 scholarships each year to the SNEAPPA membership to promote continuing education. One was awarded in 2023 to Lisa Lynch of the University of Rhode Island to attend the APPA Supervisors Toolkit. We will review budget in the coming year to confirm availability of funding moving forward.

Finances and Dues

We do not charge an annual fee for membership which keeps participation inexpensive and easy. Additionally, we keep our registration fees low (typically under \$100-125/person) to help keep our educational offerings affordable to our members. This cost model allows multiple staff from a single institution to attend our meetings while still allowing us to sustain our chapter financially. We also continue our business partner sponsorship program. This program allows our business partners to connect in additional ways with our educational partners. We added this sponsorship program in

order to keep meetings affordable while continuing to support our robust scholarship program and other important educational opportunities for our members.

Business Partner Relationships

Business Partners are welcome at all Chapter Meetings and we have had a Business Partner liaison participate in our Board meetings for several years now. This year we added a business partner position description and are also working on adding the position to our bylaws. As mentioned above we also added a sponsorship program. The sponsorship opportunities are:

Main Conference Sponsor: \$1200

Breakfast Sponsor: \$600

Lunch Sponsor: \$600

Registration Area Sponsor: \$600

Campus Tour Sponsor: \$300