



# ANNUAL REPORT

## *To Membership*

### 2023-2024



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## ERAPPA BOARD

President	Patty Smith	Vilanova University, Cabrini Campus
President - Elect	Greg Clayton	University of PEI
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	Michael Dixon	University of Delaware
Past President	Sheri Vucci	Smithsonian Institution (retired)
Regional Director	Jessica Abbott	Wolcott Public Schools
APPA Liaison to ERAPPA	Holly Judd	
Business Partner Representative	Leslie K. Whitby	

## 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

### Patty Smith, ERAPPA President

Villanova University



Dear ERAPPA Friends and Colleagues-

My sincere and heartfelt thanks to all ERAPPA members, volunteers, and especially the ERAPPA Board of Directors for all you have done for ERAPPA, and for supporting me during this past last year! In accepting the role of ERAPPA President, I made a commitment to listen, lead, and inspire those around me to ensure ERAPPA continues to meet the needs and expectations of our membership. What followed was a process of goal setting, providing a platform for sharing ideas, and eventually, results. The members and leaders did not disappoint! ERAPPA enjoyed a momentous year filled with accomplishments including meaningful representation in the selection of the new APPA President and CEO, revitalization of the ERAPPA Newsletter, Chapter outreach, Member education, enhancements to the Annual Meeting, and as I vacate the ERAPPA presidency, optimism on what the future holds. As a member of Host Chapter for ERAPPA 2024 and the ERAPPA President, I feel I have embraced and exhibited this year's theme, Lead to Inspire.

The following are some of the highlights of the past year for which I am particularly proud:

**ERAPPA –Leadership Role and Leaders Promoting Women in Facilities**

With pride, enthusiasm, and pleasure, I am delighted to share that Mary Grube (MD/DC APPA), Jean Robinson (NNERAPPA), and I (DVAPPA) participated in one of the educational offerings at the APPA Spring Conference in Nashville, TN, hosting the panel Women in Facilities, From Bias to Belonging. We three are now the founding members of the Women in Facilities Affinity Group.

#### **APPA President and CEO Selection**

ERAPPA played a significant role in selecting the new APPA President and CEO. While all APPA members were invited to Listening Sessions to hear from and learn about the candidates, some of us were more heavily involved in direct conversations with all the candidates. Jessica Abbot, former ERAPPA President and Current Regional Director, served as Co-Chair for the Selection Committee in recruiting the new APPA President and CEO. In doing so, Jessica worked tirelessly in representing our membership. With open arms ERAPPA welcomes Lalit Agarwal to the APPA family.

#### **Keeping the ERAPPA History Alive and Reintroduction of the ERAPPA Newsletter**

Looking back and forging ahead! Looking back, Immediate Past-President Sheri Vucci had the insight to create The History Committee, comprised of former ERAPPA Presidents and led by Jon Terry, current Secretary. The Committee is busy documenting our past. Visit the ERAPPA website to read the notes and take a pictorial walk down memory lane. New or old to ERAPPA, members can learn a lot about where we have been, and as we all know, the past drives the future. Should you see any corrections or additions that can be made, I invite you to please forward them to the Board Secretary.

Forging ahead, the ERAPPA newsletter was revived! Jason Sawyer, current VP for Technology along with former ERAPPA President Arthur Walsh, and current Business Partner, Vivica Williams, collected, organized, reviewed, and published two newsletters for the membership. ERAPPA Chapters and Board members were

generous with article submissions. The hope is to engage all Chapter members in sharing their work and educational experiences in future editions.

### **ERAPPA Board Member Outreach**

Among the many responsibilities of the ERAPPA Board, a key duty is to attract candidates in Chapters and ignite the spark to seek leadership positions in their Chapters and beyond. The ERAPPA Board is doing a fantastic job invigorating the leadership initiative within our members.

Cultivating leaders is important to the health of the association. An initiative this year involved the integration of the annual ERAPPA June Board Meeting with the MD/DC APPA Chapter at their Summer Conference at Turf Valley in Endicott, MD. Board meetings were intertwined with the Chapter educational offerings and Business Partner networking opportunities. Just as is case with the ERAPPA Annual Meeting, joint participation in educational sessions and networking opportunities during meals and social activities proved to be successful and beneficial to all. Going forward, Board members have committed to attending Chapter meetings outside of their own Chapter. This new initiative will further strengthen the relationship between Chapters and the ERAPPA Board by providing Chapter members the opportunity to work closely with an ERAPPA Board member on Chapter focused items. The members' strong engagement in their Chapter affairs and comfort in working with the ERAPPA Board should yield enthusiasm for members to seek future ERAPPA Board positions.

### **Annual Meeting Initiatives**

Wednesday mornings, following every ERPPA Annual Meeting, a Lessons Learned meeting is held. At this meeting Host Committees, Board Members, and Conference Planners share their experiences and observations of the annual conference while it is still fresh in their minds. Last year, with dedication and thoughtfulness, the Lessons Learned Committee took the challenge, and five significant items emerged as items that could be improved upon. The effectiveness of their work is evidenced in the improvements we have or will experience at the 2024 Annual ERAPPA Meeting: an improved registration process, improved conference communications, and a move from Guidebook to C-Vent. I am also happy to report Member voiced concerns have also been addressed by providing some down time in the conference schedule to relax and refresh, and a shortened, more efficient, Tuesday Business Meeting.

### **Financial Integrity, Transparency, and Health**

The ERAPPA budget remains sound, and the future looks bright! The annual financial audit is in progress and positive outcomes are promising. Through the Board's careful financial stewardship, ERAPPA is poised to sustain tangible support to our members by continued financial support and funding for educational scholarships, CFP coupons, Chapter professional development, and non-repayable seed funding grants to Annual Meeting Hosts. The Board is open to and invites requests for new funding opportunities for consideration.

Thank you, members, for being there for all of us. ERAPPA is not a thing, or a mere association – it is the coming together of many brilliant individuals, amalgamating all their various geniuses for the betterment of all. ERAPPA had a spectacular year, thank you for allowing me to be part of it. Your enthusiasm, desire to be the best, and your loyal support to ERAPPA made being the President a most enjoyable experience. Please accept my sincere thanks.

## Chapter Development Committee

Hugh Briggs, Vice President

Lakehead University



### The ERAPPA Chapter Affairs Committee Representatives are:

<b>Craig Hickey</b>	President Atlantic Provinces	AAPPA
<b>Brett Fulton</b>	President Delaware Valley Chapter	DVAPPA
<b>Mark Bodenschatz</b>	President Keystone Chapter	KAPPA
<b>tba November 2024</b>	President Maryland-DC Chapter	MD/DC APPA
<b>Amy Baker</b>	President New Jersey Chapter	NJAPPA
<b>Doug Consentio</b>	President Northern New England Chapter	NNECERAPPA
<b>Rex Giardine</b>	President New York Chapter	NYAPPA
<b>Scott Johnstone</b>	President of Ontario Universities	OAPPA
<b>Henry Colyn</b>	President of Ontario Colleges	OCAPPA
<b>Melissa Bergeron</b>	President of Southern New England Chapter	SNEAPPA

### Outgoing Members during 2024:

<b>Randy Gerring</b>	President Keystone Chapter	KAPPA
<b>Tim Schill</b>	President of Ontario Colleges	OCFMA
<b>Tom Baker</b>	President Northern New England Chapter	NNECERAPPA
<b>Mary Grube</b>	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 four 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.

OCFMA representing the Ontario Colleges recently voted to change their name to OCAPPA. Please welcome OCAPPA chapter members and hope that the long history of OCFMA carries on.

NYAPPA welcomed the SUNY group to their chapter. This will significantly increase that chapter's membership in the New York state area.

While the past three years have 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 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.

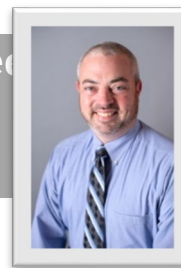
### **MID-YEAR & ANNUAL MEETING**

This year's **Mid-Year Meeting** was held in Valley Forge PA and was well attended. The full annual meeting hosted by DVAPPA in Valley Forge PA at the Valley Forge Casino Resort 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
Vivica Williams	Maryland DC Chapter	MD/DCAPPA and BP
Gus Bing	New Jersey Chapter	NJAPPA
Billy Gagnon	Northern New England Chapter	NNECERAPPA
Derek Sylvester	New York Chapter	NYAPPA
Colleen McArthur	Ontario Colleges	OCFMA
Vacant	Ontario Universities	OAPPA
Tim Garland	Southern New England Chapter	SNEAPPA

### Outgoing Members during 2023/2024:

Peyton Gibson	Southern New England Chapter	SNEAPPA
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### Web Sites for Host Committees

Provided guidance and support to the ERAPPA 2024 and 2025 Host Committees. Ogosense created two subdomains off the ERAPPA site for the 2025 and 2026 annual meetings.

### ERAPPA.ORG Website

Continued to support the ERAPPA website. We continued adding webinar links to YouTube and try to add new content to draw in visitors.

Posted job vacancies when requested.

### Zenfolio- Photo Website

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

We continue collecting photos from all sources to populate the site. Photos in the member-only area were transferred to the new website.

### Social Media Contractor

The contractor, EZ Local, continues posting weekly on various platforms like Facebook, Instagram, and LinkedIn. T&C provides the content to the contractor from the various committees. We struggle with providing new content and hope to improve in the future.

### Website Contractor Support

Continue to have a problem with new requests to access the member-only area. Ogosense provided a work around. Ogosense aided or is aiding three chapters migrate their websites to subdomains of the ERAPPA site.



**Benchmark Email**

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

**ERAPPA Newsletter**

T&C championed the start of a new newsletter for ERAPPA. We were able to collect content, build eye catching pages, and publish them in a flipbook website. The reviews of the newsletter have been fantastic, and we will continue hopefully quarterly.

[https://issuu.com/erappa/docs/erappa\\_newsletter- june2024](https://issuu.com/erappa/docs/erappa_newsletter- june2024)

**Webinars presented by ERAPPA**

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

**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. We want to continue to support the archival/history group in any technology needs to assist in their fact-finding mission.

## Member and Community Engagement Committee

Andy Feick, Vice President

Swarthmore College



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

### Outgoing members and vacancies during 2023/2024:

<b>Jeff Schmidt</b>	Delaware Valley	DVAPPA
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The Member and Community Engagement Committee welcomed one new member, Kevin Kane, during 2023-2024.

### 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). I want to express my gratitude to Gary Goss for doing an outstanding job in representing ERAPPA Membership to APPA. Gary is at the end of his term and Kathryn Brubacher will be assuming the ERAPPA Membership Liaison role to APPA.

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.

### **Mission Statement - ERAPPA Member and Community Engagement Committee**

The ERAPPA Member and Community Engagement Committee is organized to maintain proactive relationships with all membership categories. The Committee uses 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 is our foundation, 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 partly by working closely with APPA and the Chapters, 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.

#### **A. ERAPPA Annual Conference**

The 2023 ERAPPA annual conference took place September 24-27 in Saint John, New Brunswick, Canada. The conference provided attendees with numerous positive networking opportunities and attracted 305 educational and business partner participants and 55 business partner booths in the Hall of Resources. Participants were updated by members of the Board at the business meeting on September 26, 2023. 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 3:1 beverage cooler 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.

## B. 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
OCFMA	Sasso	Tony	Conestoga College
MDDCAPP	Gillespie	Patrick	University of Maryland
MDDCAPP	Pierce	Melissa	University of Maryland
AAPPA	Abdullah	Tareq	Dalhousie University
DVAPPA	Dunbar	William	Swarthmore College
AAPPA	Campbell	Michael	Dalhousie University
AAPPA	Penney	Jason	Dalhousie University

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
AAPPA	Lloy	Jennifer	University of New Brunswick
DVAPA	Stellfox	Mares	Eastern University
KAPPA	Emanuele	Thomas	Carnegie Mellon University
AAPPA	Swanburg	Meghan	Acadia University
DVAPPA	Glas	Adam	Swarthmore College
NYAPPA	Brooks	Douglas	Roberts Wesleyan University
AAPPA	Penney	Jason	Dalhousie University
NJAPPA	Bing	Gus	Princeton University

## C. ERAPPA Member and Community Engagement Committee Goal Achievement

- ✓ Assisted FTA's at registration in Saint John, New Brunswick
- ✓ Hosted a successful FTA reception in Saint John, New Brunswick

- ✓ Awarded seven Ambassador Scholarships to the 2023 ERAPPA Conference in Saint John, New Brunswick
- ✓ Awarded eight educational Scholarships to APPA U 2024 in New Orleans and San Antonio
- ✓ Filled the vacant DVAPPA committee position

#### **D. 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 (7<sup>th</sup>) 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 (8<sup>th</sup>) 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:

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

### Outgoing members during 2023/2024:

<b>Chris Andreozzi</b>	Thomas Jefferson University	DVAPPA
<b>Lan Chi Nguyen Weekes</b>	La Cite College of Applied Arts & Technology	OCFMA

### The Professional Development Committee met twice this year:

The first meeting occurred at the ERAPPA 2020+3 annual meeting that took place in September 2023 in Saint John New Brunswick, Canada. The second meeting occurred at the ERAPPA Mid-Year Meeting in Valley Forge, Pennsylvania.

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 2024 Annual Meeting September 29 – October 2, 2024.

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, the APPA PD Liaison attended all monthly conference calls to provide updates on on-going initiatives with APPA Professional Development opportunities.

### ERAPPA Initiatives:

**Lunch & Learn Webinars** – ERAPPA’s Lunch & Learn Webinars continue to be well received and well attended. Webinars were held in November 2023 (*Building Level Master Planning*), **January 2024 (ASHRAE Standard 241-2023 Control of Infectious Aerosols)**, March 2024 (*Inclusive Physical Space Framework*), May 2024 (*How to*

*Save Big Bucks by Avoiding SEWER Blockages - While attending to the Real Lack of Menstrual Equity in Women's Toilet Stalls*), and July 2024 (*Protect the Night - The What's, How's, and Why's of Reclaiming Dark Skies*).

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 2023 to June 2024, 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 January 6-9, 2025, in Fort Worth, TX.

*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.

**Invest in Success** – APPA's exciting new program designed to develop and inspire front-line staff in their role at your institutions. This program is an investment in your front-line staff by providing them foundational knowledge and skills for success in their roles and as contributors to the success of their institution. Your front-line staff are vitally important to an institution's success so invest in them today!

**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 2024 Thought Leaders Symposium took place February 2024 and the topic was, *Creating Space to Envision The Facilities of the Future*.



## Annual Meetings Committee

George Stooks, Vice President

St. John Fisher University



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

<b>Leslie Whitby</b>	Stantec	DVAPPA (2024)
<b>Amber Donato</b>	Moravian University	DVAPPA (2024)
<b>Amy Baker</b>	New Jersey Institute of Technology	NJAPPA (2025)
<b>Sue Maddalena</b>	Zack Painting	NJAPPA (2025)
<b>Jessica Abbot</b>	Wolcott Public School	SNEAPPA (2026)
<b>Melissa Bergeron</b>	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.

We returned to St. John New Brunswick in 2023 where the host committee remained relatively intact after being postponed in 2020. After a successful Mid-Year Meeting, some of which had hybrid virtual elements, the ERAPPA 2020+3 host committee gained traction and we had a successful conference that exceeded original expectations when considering travel challenges with attendees coming from afar and many that crossed the border. Business Partner and institutional member participation closed the gaps creating a successful meeting under the leadership of the host committee. As with any annual meeting there were lessons learned which gave the ERAPPA board items to address and hopefully make lasting changes

ERAPPA2024 will be in historic Valley Forge, Pennsylvania. As of this report they are close to filling exhibitor booths and many of the sponsorships. We expect robust attendance considering the geographical location, proximity to travel hubs/corridors, the quality professional development, and of the venues. The host committee has demonstrated their staying power and determination as well being postponed from 2021. Two changes this year, one that may have already made attending easier. The new registration system made getting registered smooth with minimal need for assistance. At the conference we will be using a replacement app for attendees to schedule their PD sessions and navigate the conference.

ERAPPA2025 will be in Atlantic City New Jersey, and they are well underway in their planning process which will be evident in their energy at the ERAPPA2025 booth in Valley Forge. Make a point to stop by and see what they have in store

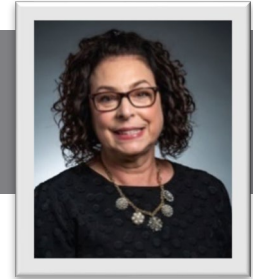
ERAPA2026 will be in Providence Rhode Island. The host committee is gearing up and we have no doubt we are in for a great annual meeting. We will hear more about this annual meeting when we are together in Valley Forge.

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. Not only will you get to work with people that have many years in educational facilities but with leaders that have benefitted from such involvement and are eager to share how 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 may 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 one year into my first two-year term.

The ERAPPA Board of Directors voted to change the title of the Business Partner Representative to Vice President of Business Partners. The change will occur after the ERAPPA membership votes at the annual ERAPPA 2024 conference.

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	Jeff Gutsfeld, AKF, Member of WSP
MD/DC APPA	Vivica Williams, archSCAN, LLC
NYAPPA	Nicholas R. Cerro, C & S Companies
NNECERAPPA	Larry Ipignataro, Competitive Energy
NJAPPA	Mike Zulla, Team PAR

**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 develop a mission statement and specific goals for the 2024/2025 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.

In 2024 KAPPA was the only chapter to implement a Membership Engagement Committee at the local level. Several of the other chapters are discussing how to implement this committee. Cristina Roth and Brian Richards from KAPPA have been meeting with other chapters to talk about their process of starting this committee and sharing the success they are having. The entire KAPPA board is engaged in this committee. See attached document for additional information.

The BP committee will review and enhance the benefits of a local chapter membership in order to increase institutional engagement. The BP committee will work on understanding the benefits of an APPA and ERAPPA membership and create a list of local chapter benefits to help engage institutional members.

### **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.

- 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):

### **Business Partner Chapter Representation**

2024 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 engage a Business Partner Rep.

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.

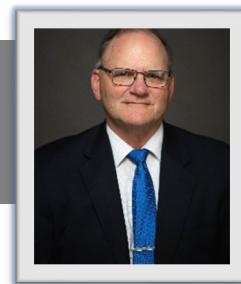
The Business Partner Chairperson may remain on the Business Partner Committee at the conclusion of their Board service as a general member of the committee for the purpose of information sharing and continuity, like the role of a past president.

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

## Treasurer's Report

Mike Dixon, Treasurer

University of Delaware



### ERAPPA Year-End Treasurer's Report July 1, 2023– June 30, 2024

The 2023-24 fiscal year resulted in a net financial surplus in the amount of \$524. This is \$80,508 better than the (\$79,194) budgeted deficit.

Revenue from membership dues was 22.6% more than budgeted. Annual meeting revenue was 189% greater than anticipated. Shoutout to the AAPPA host committee for the great job they did. Total revenue was \$89,277 more than projected.

ERAPPA continues to make a significant investment in our members, spending almost \$60,000 on scholarships and credentialing coupons. Scholarships that were not used in 2024 will be carried over into the 2025 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, 2024, and the preparation and filing of the federally required annual 990 return.

The Mid-Year meeting in 2024 was held in Valley Forge, Pennsylvania. Total expenditures were \$67,581, which is more than budgeted, due in large part to travel expenses exceeding budget.

Accounts payable reflect money owed for CEFPP coupons purchased, and costs for accounting services incurred for the 2023-24 audit and tax preparation but not yet paid.

Scholarships payable of \$698 consist of scholarships awarded but not yet used by June 30, 2024. On June 30, 2024 our cash balance was \$296,544 with prepaid expenses of \$1,464, prepaid scholarships of \$11,395, and investments of \$209,013, for an asset balance of \$505,557. This is an increase in our current asset position of \$42,094 from June 30, 2023.

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,

Michael Dixon  
ERAPPA Treasurer

**ERAPPA YEAR-END STATEMENT**  
**July 1, 2023 - June 30, 2024**

	BUDGET	Yr End TOTAL	2024 Variance
<b>REVENUE:</b>			
Interest	835.00	5,682.00	4,847.00
Dues	114,000.00	139,715.00	25,715.00
Annual Meeting Proceeds	30,636.00	88,601.00	57,965.00
Sales (Misc Revenue)	-	750.00	750.00
<b>TOTAL REVENUE</b>	<b><u>145,471.00</u></b>	<b><u>234,748.00</u></b>	<b><u>89,277.00</u></b>
<b>OPERATING EXPENSES:</b>			
Uncategorized Expense	-	-	-
<b>VP Annual Meetings</b>			
Host Com Visits	1,000.00	1,293.00	(293.00)
Winter (Mid-Year) Meet - Co-hosts	4,200.00	5,411.00	(1,211.00)
Annual Meeting expense	-	-	-
Failed Meeting Expense	-	-	-
<b>sub-total</b>	<b>5,200.00</b>	<b>6,704.00</b>	<b>(1,504.00)</b>
<b>VP Chapter Affairs</b>			
Travel- Chapter Meetings	-	790.00	(790.00)
Winter (Mid-Year) Meet - CA Comm.	<u>7,200.00</u>	<u>7,137.00</u>	<u>63.00</u>
<b>sub-total</b>	<b>7,200.00</b>	<b>7,927.00</b>	<b>63.00</b>
<b>VP Membership</b>			
Winter (Mid-Year) Meet - Mem Comm.	9,000.00	7,278.00	1,722.00
Membership Initiative	<u>4,600.00</u>	<u>142.00</u>	<u>4,458.00</u>
<b>sub-total</b>	<b>13,600.00</b>	<b>7,420.00</b>	<b>6,180.00</b>
<b>Board - Administration</b>			
Miscellaneous	1,000.00	2,858.00	(1,858.00)
Travel- ERAPPA Annual Meeting	-	-	-
Travel - APPA Annual Meeting	-	-	-
Printing & Postage	1,800.00	135.00	1,665.00
Marketing	3,500.00	2,648.00	852.00
Insurance	4,000.00	4,522.00	(522.00)
Incorporation	25.00	25.00	-
Board Meet - Winter (Mid-Year) Meet	15,000.00	36,251.00	(21,251.00)
Board Meet - Summer	15,000.00	22,051.00	(7,051.00)
Board Meet - Annual	20,000.00	19,731.00	269.00
Bank Fees	-	-	-
Accounting Fees	19,000.00	16,072.00	2,928.00
Software Fees	660.00	715.00	(55.00)
Dues Collection Fees	11,400.00	15,546.00	(4,146.00)
Annual Meeting Expense	-	-	-
Commissions & Service Fees	-	-	-
Ad-Hoc Meetings - Conference Calls	-	-	-
<b>sub-total</b>	<b>91,385.00</b>	<b>120,554.00</b>	<b>(29,169.00)</b>
<b>VP Technology-Communications</b>			
Web Review & Development	5,500.00	4,819.00	681.00
Microsoft Office 365	2,255.00	2,879.00	(624.00)
Winter (Mid-Year) Meet - T&C Comm.	8,250.00	5,374.00	2,876.00
ERAPPA Communication	<u>1,000.00</u>	<u>528.00</u>	<u>472.00</u>
<b>sub-total</b>	<b>17,005.00</b>	<b>13,600.00</b>	<b>3,405.00</b>
<b>Awards / Scholarships</b>			
Scholarships & Expenses	26,000.00	17,074.00	8,926.00
Credentialing Scholarship	33,000.00	42,900.00	(9,900.00)
Ambassador Scholarship Top-Up	-	-	-
Student Ambassador Scholarship	-	-	-
Awards	<u>5,000.00</u>	<u>4,652.00</u>	<u>348.00</u>
<b>sub-total</b>	<b>64,000.00</b>	<b>64,626.00</b>	<b>(626.00)</b>
<b>Professional Development</b>			
Misc. Prof Develop. Expenses	1,125.00	2,730.00	(1,605.00)
Partners-in-Education Support (PIE)	8,000.00	4,533.00	3,467.00
Winter (Mid-Year) Meet - PD Comm.	7,150.00	6,130.00	1,020.00
PD Webinar Expense	-	-	-
Annual Meeting Grant	10,000.00	-	10,000.00
Tools Sponsorship at Annual Meeting	-	-	-
<b>sub-total</b>	<b>26,275.00</b>	<b>13,393.00</b>	<b>12,882.00</b>
<b>Expenses Total</b>	<b><u>224,665.00</u></b>	<b><u>234,224.00</u></b>	<b><u>(8,769.00)</u></b>
<b>NET</b>	<b>(79,194.00)</b>	<b>524.00</b>	<b>80,508.00</b>



**ERAPPA Proposed Budget Treasurer's Report**  
**July 1, 2024 – June 30, 2025**

For the fiscal year 2024-25 the ERAPPA Board is proposing an operating budget that will result in a year-end operating loss of \$99,341. This loss is due primarily to increased expenses in most categories due to inflation and reflects a conservative approach to income budgeting.

The budgeted revenue for membership dues represents an adjusted 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 twelfth consecutive fiscal year, the ERAPPA dues percentage itself will not increase in fiscal year 2024-25. 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. That increase would help ensure the fiscal health of the organization in the future, but was deferred for at least six months while the board gets some perspective on whether the fiscal 2023-24 surplus partly driven by an APPA dues increase is a trend or an outlier.

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 2024-25 ERAPPA will be awarding eight educational scholarships with a total value of \$34,000, for in-person learning opportunities, and CFP credentialing coupons valued at \$33,000, to continue offering our membership the incentive to obtain their certified educational facilities professional certification.

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 2024-25, 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 2023-24 budget. Also like 2023-24 year, if events unfold favorably, we could, once again, end the year with a small surplus. Regardless of the relative financial success in the current 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 could require an increase to dues for the following one or 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 four 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 2024 - June 2025

<b>Revenue</b>		
Interest - Savings Account/CDs	5,728	based on 2024 interest rates
Membership Dues	125,000	Gross Dues; 95% of 3 year avg plus 2%, rounded to nearest 1,000
Annual Meeting Proceeds	56,177	Repayments are recorded against receivables and not actual revenue
<b>Total Revenue</b>	<b>186,905</b>	
<b>Operating Expense</b>		
<b>Annual Meetings</b>		
Expenses and Travel	4,500	5 committee members for FY25 at \$900 ea; 3 yr avg \$640 each. No travel in one of those years.
Host Committee Visits	3,200	previous 3 year average \$765. Includes 1 year of no visits.
Failed Meeting Expense	-	Not expected in 2024-25
<b>Total Annual Meetings</b>	<b>7,700</b>	
<b>Chapter Development</b>		
ERAPPA Board Travel - Chapter Meetings	10,000	Proposed to re-instate in FY24-25
Chapter Development Comm Mtg	9,000	10 committee members at \$900; 3 yr avg \$746 each. No travel in two of those years.
<b>Total Chapter Affairs</b>	<b>19,000</b>	
<b>Member &amp; Community Engagement</b>		
Membership Comm Mtg	9,000	10 committee members @ \$927; 3 yr Avg is \$869 each
ERAPPA Membership Initiative	5,000	Prior 3 yr avg was \$3,007, Board approved \$4,600 in July 2019 conference call
<b>Total Membership</b>	<b>14,000</b>	
<b>Administrative/Governance</b>		
Miscellaneous expense	1,000	3 yr avg \$16,804. Ave. greatly affected by 2023 mistaken crediting of A.M. fees to ERAPPA.
Travel - ERAPPA Annual Mtg	-	Covered in Board Meeting - Annual below.
Travel - APPA Annual Meeting	5,000	ERAPPA covers travel-room for President and Regional Rep, and registration if needed
ERAPPA meeting expense	-	has not been historically used; eliminated
Printing & Postage	1,500	3 yr avg \$689;
Marketing	3,500	Now includes social media sub account. \$15,000 approved by board in 2022.
Insurance	5,000	3 yr avg \$4,433. FY 22-23 was 5,964 which spans fiscal years.
Incorporation	25	\$25 fee
Board Meeting - Winter	42,000	3 yr avg \$26,508. Budget based on 2024 actual.
Board Meeting - Summer	15,000	3 yr avg 17,440 (2021 summer meeting held partially online.)
Board Meeting - Annual	20,000	2 yr avg \$13,993; No meeting to attend in 2021.
Bank Fees	-	No longer needed - \$0.00 budget
Accounting Fees	19,000	3 yr avg \$15,541
Software Fees	720	QuickBooks went from \$40/mth to \$50/mth in 21/22. Now \$60/month
Dues collection (APPA)	12,500	10% of dues; 3 year avg \$13,156. Estimated at 10% of planned 22-23 dues.
Annual Meeting Expense	-	Rarely used
Commission & Service Fees (Travel)	-	Eliminated in 2018-19. Fees now included in costs for each meeting/committee.
Tele-Conference	-	Eliminated in fall 2020 FY. Using MS Teams instead.
<b>Total Administration/Governance</b>	<b>125,245</b>	
<b>Technology &amp; Communication</b>		
Web Review & Development	5,500	3 yr avg \$4,402
Microsoft Office 365	2,951	\$205/person for 11 people. Switch from Dropbox to MS Office 365
Technology & Comm Mtg	9,000	10 members @ \$900 per person. 3 year average \$546.5 per person.
ERAPPA Communication	1,000	ISSUU annual subscription rate for 2024
<b>Total Technology &amp; Communications</b>	<b>18,451</b>	
<b>Awards/Scholarships</b>		
Scholarships - Leadership Acad.	34,000	Assumes 8 scholarships @ \$4,000, plus \$2,000 buffer.
Credentialing Scholarship	33,000	ERAPPA board voted in June 2023 to reduce CEFP coupons to 60 for one year for FY 23-24
Ambassador Scholarship Top-up	-	New in 14-15 covering gap in Sponsor & Actual cost, not used last 3 yrs
Student Ambassador scholarship	-	eliminated; conference sponsorship opportunity
Awards	5,000	2 yr avg \$5,208.
<b>Total Awards/Scholarships</b>	<b>72,000</b>	
<b>Professional Development</b>		
Misc P.D. Program Expenses	1,200	\$1,125 in 2022-23 for AIA registration (annual registration) request when needed
Major Update of PD Materials	-	
Partners in Education Support	8,000	Ongoing support for speakers at Chapter meetings; 3 yr avg \$3,300
Professional Development Mtg	9,900	11 @ 900; 3 yr avg \$411 each
ERAPPA A/M Program Support	-	Rarely used
Webinars	750	APPA cost now, was \$1,500 each; 4 per year
Toolkit sponsorship at Annual Meeting	-	Board voted in 17/18 to eliminate starting with 2020 annual meeting
ERAPPA A/M Grant	10,000	Grants paid for 2023, 2024, and 2025.
<b>Total Education</b>	<b>29,850</b>	
<b>Total Operating Expense</b>	<b>286,246</b>	3 year average \$237,708
<b>Net Operating Income</b>	<b>(99,341)</b>	3 year average (\$28,523)
<b>Mid-Year meeting Total Budget</b>		
	83,400	
Net Assets Beginning of Year	505,557	
Net from Operations	(99,341)	
Net Assets End of Year	406,216	

## 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 Membership / Treasurer and VP Communications / Secretary 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 David MacDonald was re-elected for a second term as VP Membership / Treasurer and Tom Gilmore was re-elected for a third and final term in the position of VP Communications / Secretary.

#### **Chapter Events**

In September 2023, our chapter was pleased to host the ERAPPA 2023 Annual Meeting in Saint John NB. This annual meeting was originally planned for 2020, but was postponed due to the pandemic. The conference was a huge success, exceeding attendance targets for both institutional delegates and business partners.

Congratulations to the co-chairs and host committee for all their work to make this a memorable and successful event. As all the chapter efforts were focused on the ERAPPA Annual Meeting, the AAPPA Fall Conference was deferred until 2024. In June 2024, the chapter held its annual Spring Business meeting, hosted by St. Thomas University in Fredericton, NB. This meeting was well represented with 16 delegates representing 10 institutions. A virtual option was available for those unable to attend in person. It was good to reconnect with many of our AAPPA colleagues.

#### **Chapter Events Planned**

AAPPA is looking forward to the return of the Fall Conference, scheduled for November 7<sup>th</sup> and 8<sup>th</sup> in Halifax, Nova Scotia. AAPPA will also be offering the APPA Supervisor's Toolkit from November 4<sup>th</sup> to the 7<sup>th</sup> as a prelude to the conference. Due to the past success of the AAPPA Fall Conference, we

will be increasing our venue size at the same location to be able to accommodate a projected larger attendance.

### **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 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**

As was done in previous years, in lieu of scholarships, AAPPa will be using funds to help offset the costs to host the APPA Supervisor's Toolkit for members of this chapter to attend. The funds will be used to help lower the registration costs for the toolkit to make it more affordable to attend this training opportunity.

## 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	Kevin Kane	Weidner University
Professional Development Board Rep	vacant	
Business Partner Board Rep	Meaghan Finney	VMA Architects

### **ERAPPA Leadership:**

President	Patty Smith	Villanova University
VP Member and Community Engagement	Andy Feick	Swarthmore College

### **ERAPPA Committee Representatives:**

Chapter Affairs	Brett Fulton	Muhlenberg College
Membership	Kevin Kane	Weidner University
Technology and Communications	Christi Muller Ford	Swarthmore College

### Chapter Governance

No bylaws or chapter changes have been presented . The Board has continued to discuss how we can go about updating our waitlist for Business Partners. We are quickly approaching ERAPPA 2024 and have had increased interest from businesses that want to be members. DVAPPA is notably different in that we have structure limits the number of Business Partners that are allowed to join and attend meetings. The Board has started to re-engage our Institutional Advancement Committee, which will provide some guidance on this matter. This discussion has been strictly internal to up to this point.

### Chapter Events August 2023 - August 2024

#### **Board of Director Meetings & Conference Calls**

- Planning Meetings:
  - **September 18<sup>th</sup>,2023**
    - discuss upcoming ERAPPA 2023 attendance
    - Conference Committees
    - discussion of Holiday event for December

- **November 29, 2023**
  - review awards if needed
  - finalize meeting plans for Cabrini in January 2024
  - Review ERAPPA 2024
  - discussion regarding business partners that are past due on payment
  - decided to open up meetings to business partners that are not members to help promote sponsorships for ERAPPA 2024
- **January 31<sup>st</sup>, 2024**
  - discuss open board positions
  - discuss who will be in attendance at the Mid-Year meeting for ERAPPA 2024
  - Approve the addition of Kimmel/Bogrette as a business partner member for bringing in Lackawanna College as an institutional member
  - Discuss membership fee increases
- **April 11<sup>th</sup>, 2024**
  - review potential members to fill board positions
  - Review ERAPPA 2024
  - review dates for upcoming meetings
  - review June Meeting at Moravian
- **July 15<sup>th</sup>, 2024**
  - discuss ERAPPA 2024- who will be in attendance
  - Review ERAPPA 2024 since we are the host chapter we need a strong presence at the meeting
  - plan future meeting dates -January 2025
  - discuss the business partner waiting list
  - planned a separate committee meeting with Kevin Kane to try to move forward with cleaning up the membership list

**Winter / Spring 2024 Chapter Meeting: January 17<sup>th</sup>, 2024 at Cabrini College.**

**This meeting was the first to be opened up to potential business partners within the Chapter.** We took the opportunity to promote ERAPPA 2024 and discuss the many levels and benefits of ERAPPA 2024 sponsorships. We had very good attendance and results from the meeting. It was also a “farewell” to Cabrini in honor of Patty Smith, ERAPPA President.

**Spring 2024 Chapter Meeting: May 8<sup>th</sup>, 2024 in King of Prussia.**

We had an afternoon social meeting to network and watch the Phillies play an afternoon game. This was an opportunity to introduce and network with new business partners and assist in promoting ERAPPA 2024.

**Summer 2024 Chapter Meeting: June 11<sup>th</sup>, 2024 at Moravian University .**

Architects from VMA (Voith McTavish) presented “Having It All: Balancing Aesthetics and Value in High-Level Interiors”. Great discussion about finishes for building interiors and the many products available.

### **Chapter Events Planned 2024-2025**

We are not planning on any meetings from June forward to allow for the focus to be on ERAPPA 2024. We need our active members to be engaged and registered for the fall event.

After ERAPPA 2024, we will host some smaller events to show our appreciation for the business partners and committees that participated in it. We have a tentative date for January of 2025 for the University of Delaware.

### **Membership**

We are trying to develop ways to engage more of the institutional members. Our attendance at Chapter meetings has started to decline, so we are looking at ways to re-engage. KAPPA has started a committee that uses business partners as the main stem for outreach, and we are going to meet with them to see if this is something we can use immediately

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. We have started to review the list and will be looking at adding categories or add members to categories to make them even out. This will allow us to add some new members- the faithful that have been waiting -while maintaining some balance to the membership.

### **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.

## Keystone Chapter KAPPA

Mark Bodenschatz, Chapter President  
Penn State Facilities Engineering Institute



### Chapter Leadership

President	Mark Bodenschatz	Penn State Facilities Engineering Institute
1st Vice President	Erik Cagle	Penn State University
2 <sup>nd</sup> Vice President	Scott Albert	Slippery Rock University
Past President	Randy Geering *	Penn State Behrend
Treasurer	Shannon Giannoutsos	Carnegie Mellon University
Secretary	Shannon Wetzel	Carnegie Mellon University
Director	Greg Black	Millersville University
Director	Brian Richards	Community College of Allegheny County
Director	Jim Miller	Sewickley Academy
Director T&C	Jim Lewis	Cheyne University
Bus. Partner Liais. (BPL)	Cristina Roth	Stahl Sheaffer Engineering
BPL in training	Rachel Sweetland	AEWorks

### **ERAPPA Committee Representatives**

Chapter Affairs	Mark Bodenschatz	Penn State Facilities Engineering Institute
Prof. Development	Greg Black	Millersville University
Prof. Development	Cristina Barnes	Stahl Sheaffer Engineering
Membership	Brian Richards	Community College of Allegheny County
Technology	Jim Lewis	Cheyne University

### Chapter Governance

KAPPA had two open positions to fill this year. Second Vice President and Treasurer. Shannon Giannoutsos agreed to run for re-election for Treasurer and Scott Albert agreed to run for Second Vice President. Both candidates were unanimously elected.

\* The retirement of Randy Geering creates a challenge in that he is not longer a KAPPA member by definition of our bylaws and therefore cannot serve as past president. The board is working to resolve this issue by granting him emeritus membership and changing the bylaws to allow emeritus members to serve as past president. If this fails, Scott Albert has agreed to serve as both past president and second vice president.

### Chapter Events

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



KAPPA's Fall 2023 meeting was hosted by Carnegie Mellon University at Doubletree Cranberry, October 24th - 25<sup>th</sup>. We had 178 attendees registered, of which 47 were institutional members. Jessie DaSilva, a mindset coach and business consultant, presented our keynote address focusing on the retention of Millennial and Gen Z workers by diving into myths, major life events, and what exactly they're looking for in a workplace, which doesn't vary much from other generations: "*What Millennials & Gen Z Want: Recruit & Retain the Generations.*" KAPPA offered two sets of three tracks of roundtable discussions for a total of six sessions, and three sets of four tracks of educational programs for a total of twelve sessions. The feedback from the conference attendees was positive. The agenda is attached for reference.

KAPPA's Spring 2024 meeting was hosted by Penn State Behrend at the Sheraton Erie Bayfront Hotel in Erie, Pennsylvania on June 11-12. We had 189 attendees registered, of which 46 were institutional members. We offered scholarships to first-time institutional attendees and drew 11 new participants. The keynote speaker was Jim Harris who presented – "*How AI Can Aide Facilities Managers.*" Jim extended his discussion over the timeframe usually used for one round of round table discussions. As a result, KAPPA offered only three roundtable discussions during one concurrent round. KAPPA also offered a total of twelve educational programs in four tracks over three successive times. The feedback from the conference attendees was generally quite positive. The agenda is attached for reference.

### **Chapter Events Planned 2024-2025**

KAPPA is not planning a Fall 2024 conference and is promoting attendance at ERAPPA Conference in Valley Forge, PA.

KAPPA may hold a joint event with Construction Owners Association of America (COAA) and Keystone Contractors Association (KCA). The proposed event is "Thanks4Giving" Food Drive & Industry Networking Event, November 21, 5-8pm, location: Axemann Brewery in Bellefonte.

KAPPA is tentatively planning the Spring 2025 Conference for April 8-9 in Lancaster, PA. KAPPA is working with DVAPPA to potentially co-host this meeting.

A focus of KAPPA board is to establish conference dates and locations much farther in advance. KAPPA board is planning a retreat at our proposed Spring 2025 Conference hotel to strategically plan these dates and locations, review and propose amendments to KAPPA bylaws, and establish a pre-conference schedule, among other business.

To accommodate this longer-term planning, we are negotiating a multi-year contract with our conference planner, DT Travel.

### **Membership**

Attendance remains below historic pre-pandemic levels. Director Richards has been reaching out to institutional members that haven't participated recently and is encouraging them to re-engage.

Our business partner attendance/support remains strong. Our business partner engagement committee (BPEC) has been active and quite engaged in promoting our institutional member participation, among other initiatives. One subcommittee of this team is focused on engaging young professionals and the whole team is working on outreach to institutional members.

A few members of the board are working collaboratively with members of the BPEC to perform targeted outreach with specific institutions who were historically very active and have fallen off recently. Part of the initiative is to reengage support from institutional executive leadership and to promote the benefits of participation in KAPPA, ERAPPA, and APPA.

Another initiative which relates to membership is the offering of scholarships for conference registration for first-time institutional attendees. These scholarships are initially paid from the KAPPA budget, but the Pete Buchheit Memorial Golf Tournament is targeted to be the primary fundraiser to support this initiative.

### 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.

Meridyth Lanza, Ayodeji Oluwaiana, Ron Pertu, all from Penn State University Park were awarded scholarships at the Fall 2023 KAPPA Conference and Shawn Limrick from Penn State Behrend were awarded scholarships during the Spring KAPPA Conference.

As mentioned in membership, KAPPA offered scholarships to first-time KAPPA conference attendees for Spring 2024 meeting in Erie and had 11 take advantage of this opportunity, 6 of whom were from new institutions or returning/infrequent institutions.

### Major Initiatives

**Membership:** The chapter continues to promote institutional membership growth as well as further expand our business partner relationships. The first-time attendees' scholarships is one initiative to incentivize new members.

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

**Business Partner Engagement Committee:** As reported in a recent ERAPPA newsletter, KAPPA Business Partner Liaison Cristina Roth and Director Brian Richards kicked off the committee on October 25, 2023, with 9 members. This is a trial effort, and one that may be replicated in the future by other chapters. Initiatives include:

- Establishing a business partner protocol
- Evaluate meeting content and conference
- Sell the value of membership to institutional members

- Engage young professionals
- Improve marketing and communications
- Pursue collaborations with other chapters and organizations

**Pre-Conference Golf Outing:** KAPPA formalized the golf outing and named it the Pete Buchheit Memorial Golf Tournament. All proceeds support the KAPPA Scholarship Fund.

**Conference Photographer:** KAPPA is working with host campuses to identify a student to take photographs during the conference. The goals are to both document the events as well as use for marketing and social media.

**Collaborative meetings:** The previously mentioned November event with KCA and COAA will be our first attempt at this outreach.

**First-time Attendee Scholarships:** See notes in “Membership” section.

**Long-Term Pre-Planning:** See notes in “Chapter Events” section.

### **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.

Many institutions are having difficulty attending because they are short staffed and can not take the time away. This seems to be a systemic problem with limited solutions.

### **Chapter Finances**

KAPPA continues to operate our conferences at a slight loss. While we do not have reconciled budgets from the Spring 2024 conference, it is expected to be a loss. The chapter’s financial position, however, 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 Geishausen	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	Larry Gregroy	Anne Arundel Community College
Business Partner Member	Vivica Williams	ArchScan

### **ERAPPA Representatives:**

Past President	Sheri Vucci	Smithsonian Institution
Treasurer	Michael Dixon	University of Delaware
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	Vivica Williams	ArchScan

### **ERAPPA Representatives to APPA:**

Awards and Recognition	Michael Dixon	University of Delaware
CLS Curriculum Development	Jonathan Cooper	Salisbury University

### Chapter Governance

Bylaws were last revised January 2024, after the changes were presented at the Fall 2023 meeting on October 20, 2023, and then an electronic vote was called for 30 days later that closed on December 27, 2023. The following changes were made to the bylaws:

- A member that has been granted Emeritus status through ERAPPA will be entitled to hold any elected office if elected to the position while an employee of an ERAPPA member institution in

good standing, are willing to perform their duties for the remainder of their elected term and have the concurrence of the majority of Board members to remain in that position.

- MD/DC APPA will reimburse reasonable business expenses related to the Board position of the Emeritus member.
- Scholarships will also be awarded to attend a MD/DC APPA Summer program. This scholarship is intended to encourage new MD/DC APPA members. It will be awarded to those who have not previously attended a MD/DC APPA Summer Program, or those who have not attended in the last five years. This scholarship will pay the registration fee for the applicant to attend the Summer Program. These scholarships will be sponsored by MD/DC APPA business partners. The number of scholarships awarded will be equal to the number of sponsorships received. The individual who is awarded the scholarship must receive funding from their respective institution for travel. The scholarship is non-competitive and requires an application and an endorsement from the applicants' supervisor. Scholarships will be awarded to institutional MD/DC APPA members who submit a completed application until all scholarships are awarded.

### **Chapter Events August 2022 – July 2023**

Board of Director Meetings & Conference Calls

- Planning Meetings:
  - January 25 & 26, 2024 - Planning Meeting, Rehoboth Beach, DE
- Conference Calls (August 2023 – July 2024)
  - Monthly – 1pm on the first Monday of each month

**Fall 2023 Educational Program** – Was hosted at Montgomery College, Rockville Campus on Friday October 20, 2023.

**Spring 2024 Educational Program** – Was hosted at University of Maryland College Park on Friday March 22, 2024

**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 12, 13 and 14.

**2024 Annual Two-Day Chapter Educational Program.** The Chapter held its' two-day program June 13 and 14, at Turf Valley Resort. We continued our success from the previous years and continued to include a Supervisors Toolkit session, which started one day early on June 12. We had 110 attendees. In addition to the supervisor's toolkit session, we had a mixture of educational sessions that ranged from Embracing Artificial Intelligence (AI) in Facilities, Future of HVAC Facility Management, Building Enclosure Commissioner and many other topics over the two days.

### **Chapter Events Planned 2024-2025**

**Fall Educational Program:** The Chapter is planning its fall one-day event for Friday November 1, 2024, to be held at Goucher College.

**Spring 2025 Educational Program:** Date and location is TBD.

**2025 Annual Two-Day Educational Program.** June 12 & 13, 2025 at Turf Valley Resort.

### **Membership**

Our Institutional Membership numbers are holding steady and in 2023-2024 we have noticed and increase in the numbers of our membership at our conference events. We continue to work at recruiting new members including K-12 and community colleges, and re-engaging institutions that have declined in participation.

### **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**

Colleen Kirby, Salisbury University – received Chapter Champion Award at the ERAPPA 2020+3 Annual Conference held September 24 – September 27, 2023, in Saint John New Brunswick.

Steve Hinz & Mike Sofield, Smithsonian Institution – received President’s Award at the ERAPPA 2020+3 Annual Conference held September 24 – September 27, 2023, in Saint John New Brunswick.

### **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.** No new scholarship initiatives.

**Technology.** No new technology initiatives.

**Business Partner Engagement Committee Implementation.** The chapter is working on implementing a committee that is made up of energetic business partners and institutional members from our membership to develop new membership development from marketing, outreach, membership recruitment, etc. We are excited for this initiative in the 2024-2025 year.

### **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
Director at Large	Nathaniel Saviet	Bergen Community College
Business Partners	Christine Messina	All Risk Inc.
Business Partners	Susan Maddalena	Zack Painting
Business Partners (2023)	David Cole	Colliers Engineering
Business Partners (2024)	Mike Zulla	Team PAR

### 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 (2023)	Christine Messina	All Risk, Inc.
Business Partners (2024)	Mike Zulla	Team PAR

### Chapter Governance

#### **Bylaws:**

Bylaw changes are pending for the following areas:

- Update: Voting Privileges for BP Member Representatives
- Update: Further Define terms for Trustees
- Proposed: Formation of BP Subcommittee Structure

#### **Board Positions:**

All board members in their positions are currently reviewing their descriptions and will be providing updates to those that need it.

**Chapter Health:***What went well?*

- Increased EDU/BP membership costs
- Increased conference costs
- Reassessed sponsorship levels

*What were the Outcomes?*

- An improvement over 2022.
- Walter to do a deeper dive to compare cost from 2022 and 2023 Spring and conference and last (2) General Membership Meetings (Princeton/Rutgers) and present at a future meeting.
- Improved membership dues & event collections

*Goals for 2024/2025 –*

- Continue to close the gap on expenditure for conferences.
- Develop a program for “Annual Sponsors” and implement
- Build back a significant reserve to cover operating expenses and growth plan for the next 9-years through a successful ERAPAP 2025

**Chapter Events 2022 - 2023*****Monthly Board Planning Meetings***

- July 13, 2023 (1st Annual Board Planning Retreat, at New Jersey Institute of Technology)
- August 3, 2023 (Zoom)
- September 14, 2023 (Zoom)
- October 26, 2023 (At Princeton University)
- November 9, 2023 (Zoom)
- December 15, 2023 (Annual Holiday Lunch and Board Meeting)
- February 8, 2024 (Zoom)
- March 15, 2024 (Seaview Resort, Galloway Twp, NJ)
- April 11, 2024 (Zoom)
- May 22, 2024 (At Rutgers University)
- June 13, 2024 (At Rutgers University)
- July 11, 2024 (2nd Annual Board Planning Retreat, at New Jersey Institute of Technology)

***Member-Focused Educational Events:***

- Fall General Membership Meeting, Princeton University, October 26, 2023
- 15th Annual Spring Conference, Seaview Resort, Galloway Twp, NJ, March 20 – 22, 2024
- Spring General Membership Meeting & Board Elections, Rutgers University, Piscataway, NJ, June 13, 2024

***Recap of Member Education Events:***



## **Fall General Membership Meeting, Princeton University, October 26, 2023:**

### **Welcome Remarks and Board Introductions:**

Amy Baker, New Jersey Institute of Technology, *NJAPPA President*

Keith Barton, Princeton University, *Assistant Vice President, Facilities Operations*

### **Session One:**

***“Princeton University – Implementing the 2026 Campus Plan”***

***Presenter: Keith Barton, P.E., Assistant Vice President, Facilities Operations, Princeton University, and John Hannum, P.E., Program Manager-Commissioning, Office of Capital Projects, Princeton University***

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Princeton University is in the midst of historic growth and capital project activity to implement the 2026 Campus Plan. This presentation will include a brief overview of the program and component projects, and then focus on two significant aspects: the building turnover process from capital to operations and maintenance and continuing asset management, and the implementation of geo-exchange as part of our goal to achieve a zero carbon footprint, Net Zero by 2046. We will review the techniques, technology, and process improvements that Princeton Facilities is employing and discuss how these can be tailored and applied elsewhere.

### ***Bridging the Gap Between Construction and Facilities Management***

***Presenters: Matt Krenek, Sr. Project Manager, Thomas Perry, Project Executive, Skanska USA Building, and J. Jarrett Messina, Sr. Project Manager - Princeton University***

As a new era begins on the Princeton campus with a focus on the University’s Sustainability Action Plan, Skanska is working on two meaningful projects—the renovation and expansion of the Dillon Gymnasium (The 1986 Fitness and Wellness Center Project) and the historic renovation and new addition to Schmidt Hall. Both projects incorporate sustainable elements such as mass timber, enhanced stormwater management, geothermal heating and cooling systems and energy-efficient lighting and controls.

During the construction phase of any project, as the focus narrows to delivering on time and staying within budget, current facilities management considerations are often overlooked, leading to additional challenges in day-to-day operations. Many of these challenges—particularly when projects involve renovations to occupied spaces—are due to lack of communication and coordination between the construction team and the facilities management team.

Using concrete examples that illustrate the power of communication and collaboration, we will share best practices that solve immediate day-to-day operational challenges and ultimately lead to a seamless building turnover.

### **Campus Tours:**

Several guided campus tours were offered to all attendees to showcase Princeton’s robust capital program.

**15th Annual Spring Conference, Seaview Resort, Galloway Twp, NJ, March 20 – 22, 2024:**

**KEYNOTE: Kim Becking**

**IGNITE Unstoppable Momentum:**

**Harness the Power of Adaptability, Resilience, and Mindset in a Rapidly Changing World that NEVER SLOWS. DOWN.**

You will learn to:

- Harness the power of self-awareness and emotional intelligence to manage and own the emotions that come with change, uncertainty, and stress for you and those you lead.
- Empower yourself and your team during seasons of intense change and uncertainty with easy-to-implement resilience booster and stress reducer tools.
- Leverage specific strategies to connect, engage, and keep your team motivated.
- Stay present, positive, and productive by embracing what's now, and be ready for what's next in an ever-evolving world, increasing engagement and morale.

Create a resilient, unstoppable culture where productivity flourishes, collaboration skyrockets, trust is elevated, and your team and organization thrive—no matter what happens.

**SESSION I: Inspecting, Cleaning, and Rehabilitating Piping Infrastructure**

The presentation reinforces the belief that you cannot manage what you cannot measure, but that you can in fact measure what you may not think is easily accessible!

There are many tools available to a campus facility's O&M team to establish a baseline condition assessment of the campus's underground and in-building / in-wall utility infrastructure, all of which are subject to a steadily changing environment. These assessments often are one of the first steps to developing a risk-based profile to help prioritize, plan, and budget for the eventual remediation of this infrastructure. This presentation will touch on the suite of tools that are available to the facilities teams (and their subcontractors) to accomplish this task in four key areas – inspection, cleaning, condition assessment, and remediation.

*Presenters:*

- Alex Olson Director, Infrastructure Services

*Progressive Pipeline Management*

- Walt Molishus, Director of Trades Manager  
*University of Pennsylvania*

**SESSION II: Case Study: Repositioning Underutilized Assets to Increase Long-Term Value**

In higher education, a thoughtful approach to asset optimization can create institutional resilience, energize campus life, and ensure long-term institutional success. Realizing these goals requires careful planning and strategic application of institutional assets. How does this process work, and what are the best practices for planning and designing for the future?

This panel will use multiple projects across scale, complexity, completion status, institution type, budget, building typology, institutional goals, and more to explore how underutilized

existing campus assets can be reinvigorated and reimaged for maximum impact increasing long-term value. By facilitating student engagement in the planning and design process, utilizing a human-centric approach to design to serve student needs and create flexible, multimodal spaces, facilities can become future-experiential environments that meet evolving campus needs and support strategic growth.

*Presenters:*

- Laura Berman, AIA, LEED AP  
Assistant Vice President, Architecture and Design  
Assistant University Architect  
Institutional Planning and Operations, Planning, Development, and Design *Rutgers University*
- Dr. Jay Stefanelli  
Director, Enrollment Management Division,  
One Stop Student Services Center  
*Rutgers University, New Brunswick Campus*
- Don Kim, AIA, LEED AP Senior Associate *KSS Architects, LLP*

**SESSION III: Introduction to AI for the Facilities Professional and How to Apply It**

Leaders at all levels of facilities operations and capital planning navigate a whirlwind of time-sensitive planned projects and unpredictable demands. Charged with overseeing a broad array of responsibilities, from managing maintenance and repairs, ensuring safety compliance, coordinating construction and renovations, and to optimizing efficiency, your days are a challenging balance of communicating, decision making, documenting, and doing.

With a demanding schedule that leaves little room for rest, any new ways to save you time and improve productivity are critical. Since the public release of AI-powered language models like OpenAI's ChatGPT and Google's Bard, higher ed professionals have already begun using AI to make their jobs easier in a variety of applications. Program takeaways include what is AI, how to apply it and what are the pitfalls to avoid.

*Presenters:*

- Nathaniel Saviet  
Vice President of Facilities  
*Bergen Community College*
- Christine Messina  
Chief Marketing Officer  
*All Risk, Inc.*
- Joe Flynn  
Senior Associate  
*H2M Architects & Engineers*

### Session IV: 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:*

- Keith Barton

Assistant Vice President, Facilities Operations

*Princeton University*

- Andrew Christ, PE (*Moderator*)

Senior Vice President, Real Estate and Capital Operations

*New Jersey Institute of Technology*

- Shawn Connolly

Vice President for University Facilities

*Montclair State University*

- Donald M. Hudson, AIA

Senior Vice President, Facilities & Operations

*Stockton University*

- 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*

### **Spring General Membership Meeting, Rutgers University, Piscataway, NJ, June 13, 2024:**

#### **Welcome Remarks and Board Introductions:**

- Amy Baker, New Jersey Institute of Technology, NJAPPA President
- Antonio M. Calcado, Executive Vice President and Chief Operating Officer, Rutgers, The State University of New Jersey

#### **Session I: "Navigating Facility Excellence: The Power of KPI's"**

In the world of facility management, Key Performance Indicators (KPIs) are quietly revolutionizing operations. Join us as we explore their practical applications and transformative potential.

Discover how KPIs provide a roadmap for operational efficiency, guiding decisions from day-to-day tasks to strategic planning. From maintenance prioritization to risk management, we'll delve into how KPIs can drive success at every level of your organization.

**Key Takeaways:**

- Learn to manage facilities with data-driven precision.
- Implement a KPI-driven approach with practical insights and commitment.
- Uncover strategies for organizational efficiency through thoughtful analysis and KPI utilization.
- Gain a deeper understanding of your business to make informed decisions.

Join us as we uncover the role of KPIs in elevating your facility management practices. Enhance efficiency, streamline operations, and pave the way for lasting success.

*Presenters:*

- Boyd Moore, Senior Director, Facilities Operations and Services, Institutional Planning and Operations, Rutgers University
- John Pereira, Area Operations Manager, Rutgers University

**Session II: “Overview of APPA 1000, APPA's Standard on Total Cost of Ownership”**

This session will walk participants through the impetus behind and the development of APPA’s standard on Total Cost of Ownership. An overview of the standard, along with discussing use cases of applicable scenarios, is intended to provide attendees with an understanding of the standard, how it could be applied, and how it might impact their operations at all levels of the organization.

**Key Takeaways:**

- To become familiar with or greater understanding of APPA’s published standard for total cost of ownership modeling.
- To be able to evaluate case studies on how the standard might apply to various situations.
- To workshop modeling the TCO principles in sample scenarios to help them gain additional familiarity.
- Have the ability to utilize the standard and have effective discussions about implementation within their operations.

*Presented by:*

- Cameron Christensen, CEFP, FMP, Director, Asset Management, Facilities Operations, *Princeton University*

**ERAPPA Updates** Amy Baker, *NJAPPA President*  
**Board Nominations, Elections, and Installment**

- Earl Farrell, NJAPPA Past-President
- Amy Baker, NJAPPA President

**Chapter Events Planned for the remainder of 2024-2025:**

- **Fall General Membership Meeting:** November 1, 2024, at Montclair State University. This will be in our standard 2-presenter format. The agenda is in the planning stages.
- **16th Annual Spring Conference:** This conference will be deferred to 2026 due to hosting the ERAPPA 2025 conference.
- **Spring General Membership Meeting:** Location TBD and content to be development.

- **Supervisor’s Toolkit:** None were planned for 2023-2024. We intend to offer this during the ERAPPA 2025 Conference in Atlantic City, NJ
- **“Drive-Ins”:** Discussions regarding potential site visits for EDU members only. The first one will be held at Dancker in Spring 2025 TBD. This will be in their 250,000 SF furniture warehouse, with multiple vendors in a trade show format.
- **Social Networking Events:** (2) Annually: This topic came out of our 1st annual planning meeting. The BP reps have formed a subcommittee to discuss with BP members and create an action plan. This is still in its infancy and has been deferred to Spring 2025.

### Upcoming ERAPPA Annual Conference & Exhibit 2024, Valley Forge, PA

All committees will be represented. (12) 2025 Host Committee representatives will also be present and participate in promotional activities in the booth.

### Membership

One of the outcomes from our 1st Annual Planning Meeting in 2023 was to increase member dues as follows:

- Institutions: from \$100 to \$200 annually, running on a fiscal year cycle. This was a cycle change for us, that was beneficial for our members. Includes all employees.
- Business Partners: from \$200 to \$300 in 2024, and \$400 in 2025. Our rates have been the same for 20+ years. Members did not question the increase.

We underwent a robust renewal campaign in an effort to clean up our very outdated membership lists and allow for new additions. We are in a strong position

### Scholarships

The following scholarships were offered by NJAPPA to attend the 15<sup>th</sup> Annual Conference in Galloway Twp, NJ, which covered registration, meals, 2 nights hotel, and mileage reimbursement:

- Dianne Gravatt Honorary Scholarship: **Melissa Petracca** (*Matheny School*)
- Richard Engle Memorial Scholarship: **Joseph O’Brien** (*TCNJ*)
- Ken Olsen Memorial Scholarship: **Justine DiNardi-Lim** (*Stevens*)
- NJAPPA First Time Attendee Scholarship: **Kate Bond** (*MSU*)

#### **NJAPPA/ERAPPA Sponsored Scholarships:**

- **Tawanda Thomas**, (*Rutgers*): 2023 ERAPPA Scholarship
- **Arlin Fontanilla**, (*Matheny School*): 2023 ERAPPA Scholarship
- **Gus Bing**, (*Princeton*): 2023 ERAPPA Scholarship

**Guidelines:** (NOTE: Due to financial restraints as we plan for ERAPPA 2025, we will not offer ERAPPA Scholarships in 2024. We will resume our offerings in 2025 as follows:

(3-5) Scholarships will be awarded for the ERAPPA 2025 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.

**ERAPPA Sponsored Scholarships:**

- **Gus Bing** (*Princeton*): 2024 ERAPPA Foundation Scholarship, 2024 Educational Scholarship – Attended APPA Institute in New Orleans.
- **Raj Shah** (*MSU*): 2024 ERAPPA Foundation Scholarship

**Awards and Recognition**

**Earl Farrell:** Award from NJAPPA in recognition of his outstanding leadership as President. 2023 ERAPPA Chapter Champion.

**Josh Johnson:** 2023 ERAPPA Award for Rising Star

**Major Initiatives**

**2nd Annual Board Planning Retreat:** July 11, 2024, at New Jersey Institute of Technology. The theme established was: ***Building Upon Our Growth Trajectory***. This meeting 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 developed:

**AGENDA:**

**Chapter Health:**

*What went well?*

- Increased EDU/BP membership costs
- Increased conference costs
- Reassessed sponsorship levels

*What were the Outcomes?*

- An improvement over 2022.
- Walter to do a deeper dive to compare cost from 2022 and 2023 Spring and conference and last (2) General Membership Meetings (Princeton/Rutgers) and present at a future meeting.
- Improved membership dues & event collections

*Goals for 2024/2025 –*

- Continue to close the gap on expenditure for conferences.
- Develop a program for “Annual Sponsors” and implement
- Build back a significant reserve to cover operating expenses and growth plan for the next 9-years through a successful ERAPAP 2025
- **(NS)** How well do we know what other APPA chapters are doing? Explore cross connection opportunities

- **(JP)** Get our ducks in a row for a successful ERAPPA 2025.
- **(EF) Bylaws:**
  - Update: Voting Privileges for BP Member Representatives
  - Update: Further Define terms for Trustees
  - Proposed: Formation of BP Subcommittee Structure
  - Earl & BP Committee to review DVAPPA structure and make recommendations. Regroup after August Meeting
  - Any other proposed bylaw changes?

### **Professional Development:**

#### *What went well?*

- Variety of Presentations
- Collaboration/Assistance of team
- Well-received presenters

#### *What to improve for 2024/2025?*

- Concentration on mix of presentations
- Vetting of presenters
- Collaboration with APPA/ERAPPA
- More learning content at Spring Meeting
- Continue Senior Leaders' Roundtable/Add Middle Manager's ?

#### *Goals for 2024/2025 –*

- Vetting Presenters
- Encourage mix of presentations
- Engage with EDU Members for solicitation of presentations
- **(JP)** The idea of bringing back drive-thru's will increase our exposure and commitment to involvement with different institutions.

### **Technology:**

#### *What went well?*

- Timely updates
- Clear information
- Thorough clean-up of site
- Use of new technology
- Collaboration with ERAPPA
- Information is CURRENT!

#### *Goals for 2024/2025 –*

- Digital Transformation and Innovation
  1. Ensure that all technology systems are current and can support the latest digital initiatives.
- Communication and Collaboration



Improve internal communication channels to ensure that all members are well-informed and can collaborate effectively.

2. Develop strategies to increase member engagement through various communication platforms, such as social media, email newsletters, and the NJAPPA website.

3. Establish feedback mechanisms to gather input from members and address their concerns promptly.

- Training and Development

1. Provide ongoing training programs to keep staff and members up-to-date with the latest technology trends and tools.

2. Offer leadership development programs to help members enhance their managerial and leadership skills.

3. Organize workshops and webinars on relevant topics to foster continuous learning and professional growth.

- Strategic Planning

1. Implement performance metrics to measure the effectiveness of technology initiatives and communication efforts.

2. Foster a culture of continuous improvement by regularly reviewing and updating technology and communication strategies.

- Member Services and Support

1. Enhance technical support services to assist members with any technology-related issues they may encounter.

2. Develop an online resource library with useful documents, guides, and tools for members.

3. Establish a help desk or support center to address member inquiries and provide timely assistance.

- Event Management

1. Incorporate virtual and hybrid event options to increase accessibility and participation.

2. Utilize event management software and apps to streamline event planning and execution, i.e. WordPress, MailChimp, NJAPPA, APPA, etc.

3. Conduct post-event analyses to gather feedback and improve future events.

- Marketing and Public Relations

1. Strengthen NJAPPA's brand through consistent and effective messaging across all communication channels.

2. Enhance social media presence to reach a wider audience and promote NJAPPA's activities and initiatives.

**Membership:***What went well?*

- Well-maintained list of members
- Timely invoicing and communications
- Great collaboration between board members

*Goals for 2024/2025 –*

- Member EDU & BP Recruitment
- Continued List Management and Review Process Implementation
- Timely Scholarship Programs (NJAPPA/ERAPPA)
- Collaboration with other ERAPPA Chapters for “best practices” for all of the above areas.
- **(NS)** There are a lot of first-time attendees and members - how can we capitalize on that? (Welcome letter?)
- **(NS)** How can we retain these new members and attendees?

**Business Partners:***What went well?*

- BP Member engagement & Cross-collaboration through initiation of the BP Subcommittee at the leadership of our (3) strong representatives!
- New Members/Sponsors

*Goals for 2024/2025 –*

## 1. Structure/Organization

- Mike Zulla, Liaison to NJAPPA President/Board
- Quarterly Meetings with BP general membership (2nd month/first Tues) with meeting minutes provided.
- 9/10/24 "kick-off" to recenter and develop core steering committees (outline of proposed subcommittees for August BM for review)

## 2. Proposed Social Events:

- Social Committee Formation
- 10/17: 1st Event: Social Hour at Galloping Hill Caterers (to be confirmed)
- Spring 2025: Minor League Baseball Game

## 3. Communications:

- Formation of "Communications" Committee
- Proposed Newsletter (for discussion)

### What's Next?

- Recap
- Next Steps
- Implementation Timeline (Realistic)
- Commitment
- Questions?
- Conclusion

During the meeting we had an open working session and established action plans for each area, which will be further developed as we continue to meet throughout the year.

## Northern New England Chapter NNECERAPPA

*Doug Cosentino*, Chapter President  
Dartmouth College



### Chapter Leadership

Doug Cosentino	Dartmouth College	President
Doug Cosentino	Dartmouth 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 Ipnigataro	Competitive Energy	Business Partner Liaison

### **ERAPPA Committee Representatives**

Chapter Development	<b>Doug Cosentino</b>
Professional Development	<b>Tim Pratt</b>
Member and Comm. Engagement	<b>Tandra Boilard</b>
Technology & Communications	<b>Billy Gagnon</b>

### Chapter Governance

Tom Baker stepped down as President and Douglas Cosentino assumed the position.

### Chapter Events in 2023

#### **Board Meetings & Conference Calls**

- In-Person Conference March 27-29, 2024, at Colby College (ME)
- In-Person on Board Meeting July 21-22, 2024 at USM (ME)
- Conference Calls: Calls are held monthly on the third Thursday of the month.

#### **Confirmed Chapter Events Planned 2024**

- Conference tentatively scheduled for March 10-12, 2025 , at University of Vermont Burlington.

## **Membership**

Our Institutional Membership numbers are holding. We continue to work at recruiting new members including K-12 and community colleges. Last year's efforts added 10 new institutional members at the Spring conference.

## **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



**Chapter Leadership**

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

ERAPPA Committee Representation:

Annual Meetings	George Stooks	St John Fisher College
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**

The long awaited formal merger in the Fall of 2022 of SUNY-PPAA with NYAPPA has resulted in a more robust overall organization. Beyond the Board Officers named above, we for the first time in some years have a full slate of eight Directors and a limited number of vacancies among the eight Alternate Director positions. We value and strive for a diverse balance on our boards that includes representatives from Public and Private institutions, that should ideally also include representatives from our Community Colleges and Medical Universities.

**Chapter Events**

- Winter Conference February 5-7, 2024 in Saratoga, New York with approximately 165 attendees
- Summer Conference July 16-18, 2024, in Poughkeepsie, New York with approximately 320 attendees.

**Chapter Events Planned Through 2024**

- Winter Conference February 3-5, 2025 Saratoga, New York
- Summer Conference in Western New York; dates TBD. Location likely Buffalo or Niagara Falls Area.

**Membership**

While always looking to expand our membership network, we are pleased to report that Marist College and Vassar College, two institutions we sought as participants, were both very active in planning our recent Summer Conference in nearby Poughkeepsie. Each campus provided a tour of their campus facilities for attendees on the first morning of our conference.

### **Scholarships**

NYAPPA is planning to fully underwrite the cost of trainer's expenses for APPA's Supervisors Toolkit at various locations across the State as long as any institutions with 90 minutes can be invited.

### **Major Initiatives**

- Drive-In Workshops self-organized by NYAPPA for Fall and Spring at select campuses: Targeting locations closer to the boundaries of New York State such as: D'Youville in Buffalo, Clarkson University in Potsdam, St. Bonaventure in Olean. Website work in progress with improved platform updates.

### **Areas of Concern**

Summer Conferences timing can be a delicate balance and challenging for some member institutions to send representatives during "construction season". Winter Conferences might become more robust if sponsors were included. While early in the year is often a good time to get away from a campus, depending on location weather remains a serious risk for cancellations.

Our traditionally very modest fees to attend will also need to be adjusted keep pace with inflation.

While we have very few active Downstate NY Institutions (Metropolitan NYC Area and Long Island) there seems to be a perennial disconnect. The Poughkeepsie location for the Summer 2024 conference was chosen for proximity to NYC (2 ¼ hours by car or train) however it largely failed to draw a significant number of institutional members from there.

### **Business Partner Relationships**

We have begun the process to develop a broader and deeper relationship with our Business Partners.

### **Finances and Chapter Dues**

At our recent Summer 2024 conference NYAPPA and the previous SUNY-PPAA have a finalized agreement to combine all account balances under NYAPPA. The NYAPPA financial position remained very strong as of the midpoint of 2024. As the chapter does not collect membership dues, the sources of revenue are the summer and winter conferences and the ERAPPA conference cycle hosted in 2022, and again in 2031. Business Partner Sponsors are permitted to only participate in the Summer Conference allowing that event to generate enough profit to offset perennial minor losses from the Winter Conference. Our long-term financial plan is to draw down this retained equity to deliver and support professional development within our chapter. NYAPPA partially subsidizes Board Members to attend ERAPPA Conferences.

## 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 May 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

- 2023:
  - January 25, 2023, OAPPA Monthly meeting
  - February 28, 2023 OAPPA Monthly meeting
  - March 29, 2023, OAPPA Quarterly meeting (Hybrid)
  - April 26, 2023, OAPPA Monthly meeting
  - June 2, 2023, OAPPA AGM (hybrid)
  - September 20, 2023, OAPPA Quarterly meeting (hybrid)
  - October 24 2023, OAPPA Monthly Meeting (October)
  - December 5, 2023, OAPPA Quarterly meeting (hybrid)
- 2024:
  - January 30, 2024, OAPPA Monthly Meeting (January)
  - March 5, 2024, OAPPA Quarterly meeting (online)



- April 24, 2024, OAPPA Monthly meeting (April)
  - May 31, 2024, OAPPA AGM (hybrid)
- Annual in-person conference scheduled was held the end of May at the University of Windsor. The Conference was a great success with over 100 attendees and sponsors.

### **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 2024

### **Major Initiatives**

- Energy Committee:
  - i. Collective letter submitted to the Ontario Energy Board via the OAPPA Energy Committee (and Jupiter EA) on the issue of standby rates for behind the meter generation (attached).
  - ii. Collective letter submitted on behalf of college's and universities to the MECP regarding their carbon tax program (attached).
  - iii. The energy committee is also working closely with the IESO for Electricity Grant funding and is nearing completion of setting up a collaborative sector wide procurement process for forward purchasing electricity needs (i.e. hedging)
- Campus Asset Management & Planning (formerly FCAP/Deferred maintenance):
  - i. University dataset (minus Laurier, *at own* request) submitted *on* Dec 2023 to MCU/ MOI (MCU to use Laurier's last dataset); *the next submission's* due date *is* Jun 2024
  - ii. Newly formed steering committee and working group (has at least 1 rep from each institution – thanks!) *will meet monthly in advancing the data clean-up for the next submission*
  - iii. RothIAMS provided year-end review including stats of assessments completed, training provided/ participation by institution, OECM contract extended to 2027.
  - iv. Tentative in-year workplan:
    1. Understanding the data inputs/ outputs for data integrity by WG
    2. Standardizing terms and nomenclature for reporting consistency
    3. Finalize CRV calculation model (with Ontario colleges)

4. Establish major asset category to differentiate major assets in the MOI database to ease inclusion/ exclusion for reporting – main campus, regional campus, research park, ancillary, infrastructure?
  5. Establish sector-wide prioritization approach for CRM requirements/ deficiencies
  6. Develop system/ institutional story relating to asset management
- Project management office/community of practice: Review and train members on procurement best practices, exploring the idea of moving away from Stipulated Bid to Construction Management. Foster knowledge transfer among universities.
  - Education: Team members in the PD group are leading efforts to reinvest chapter money into membership education. New training session underway with more at the annual conference.

# ONTARIO COLLEGE FACILITIES MANAGEMENT ASSOCIATION

## OCAPPA

*Henry Colyn, Chapter President*  
Mohawk College



### Chapter Leadership

Chair	Henry Colyn	Mohawk College
Chair Elect	Lan Chi Nguyen Weekes	Le Cite College
Past Chair	Tim Schill	Conestoga College
Secretary	Robin Gould	Confederation College
Treasurer	Brent Thomas	Lambton College
Energy	Paul Cochrane	Lambton College
Asset Management	Spencer Wood	Humber College

### **ERAPPA Committee Representatives**

Professional Development	Nadeen Shehaiber	Niagara College
T&C Committee	Colleen McArthur	Algonquin College
Member and Comm. Engagement	Kathryn Brubacher	Conestoga College

### Chapter Governance

The Chapter's new name OCAPPA (formerly OCFMA) has been approved at the annual PD conference AGM along with an updated Terms of Reference and approved new logo. 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

OCAPPA holds its annual PD session and AGM each spring. This past year's event was hosted June 17-19 by Fanshawe College in London, Ontario. The theme was "Frontier Horizons: Shaping Tomorrow's Campuses". Topics included use of innovative technology, space utilization, green standards, existing building commissioning and round table discussions. We continue our bimonthly meetings in person with our next meeting in August.

### Membership

The majority of Colleges renewed their membership for 24/25. We are continuing to see some turnover of Facilities department leaders at the Colleges and the renewal not getting to the right person in time for renewal. In the next year we will attempt to drive up membership and have more participation in our bimonthly meetings. We will also be encouraging members to attend the ERAPPA and APPA annual conferences. It is a great opportunity to network and collaborate with other like-minded facility

professionals from all over North America (and even the world). Because the Colleges and Universities in Ontario are government funded we remain unable to have direct business partners.

### **Scholarships**

This year, for the first time, we offered scholarships of OCAPPA members to attend our annual PD Conference and AGM. This was in recognition that some Colleges have limited financial resources to travel and attend these events. This was extremely successful and we are looking to increase the level of sponsorship for next year as well.

### **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. The hope is that we can have people interested in committee roles to shadow current members and Chairs so when the current leaders terms expire, we have a new group of leaders ready to step into these roles.

### **Areas of Concern**

Membership and involvement continues to be a 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 with ongoing budget constraints. There is also a financial component to travelling to the bimonthly meetings typically held at Humber College. One item for discussion this year will be how to drive up in person attendance at these meetings recognizing the level of collaboration is not the same virtually as it is when attending in person.

### **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. With healthy sponsorship for our annual PD Conference and AGM this year, we will be looking to provide more sponsorship for people to attend future events in person.

## SOUTHERN NEW ENGLAND CHAPTER

### SNEAPPA

*Melissa Bergeron, Chapter President*

UMASS, Amherst



#### **Chapter Leadership**

President	Melissa Bergeron	UMass, Amherst
Vice President	Glen Mathieu	University of Connecticut
Secretary	Jean Robinson	UMass, Lowell
Treasurer	Maria Morrissey	UMass, Lowell
Past President	Chris Dupuis	CSL Consulting
CT State Rep	Jessica Abbott	Wolcott Public Schools
MA State Rep	Jayson Davis	Bridgewater State University
RI State Rep	Karl Calvo	University of Rhode Island
Director of Technology	Tim Garland	New England Air Museum
Director of Prof. Dev.	Jerry Santos	Bridgewater State University
Director of Mem. Engage.	Tammy Goodale	Bridgewater State University
Business Partner	Jeff Gutsfeld	AKF Group

#### **Representative at Large**

Meaghan Healey	Northeastern University
Heidi Cooper	University of Rhode Island

#### **ERAPPA Committee Representatives:**

Chapter Development	Melissa Bergeron	UMass, Amherst
Prof. Development	Jerry Santos	Bridgewater State University
Member & Comm. Eng.	Tammy Goodale	Bridgewater State University
Technology	Tim Garland	New England Air Museum

#### **Chapter Governance**

This past year we significantly updated our bylaws. We reviewed and updated language and most significantly created official board positions for Director of Professional Development, Director of Membership Engagement, and Director of Technology. We also instituted an even and odd year election cycle so that there is consistency between elections.

Board meetings were held monthly via zoom. Board meeting are held in person at our chapter meetings (November, March, and June). We also had an ERAPPA 2026 planning meeting the evening before our November meeting. Annual elections were held in person at our June 2024 meeting at the University of Rhode Island Narragansett campus.

## **Chapter Meetings in 2023-2024**

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-three 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.

**11/2/2024** –University of Connecticut – Educational sessions included:

1. Building your Workforce from Within – Future Workforce for UConn Facilities Operations
2. University of Connecticut Centralized Operations & Control Center
3. University of Connecticut H Hydrogen Technologies Research and Applications Initiatives

Tours included: UConn’s Centralized Operations & Control Center, UConn’s Combustion to Hydrogen Central Power Plant, and an in-depth discussion on UConn’s Facilities Management Apprenticeship Program.

**3/12/2024** – New England Air Museum – Educational sessions included:

1. Best Practices for Campus Security
2. APPA Thought Leaders Series: Bomb Threat at Commencement
3. What Millennials & Gen Z Want: How to Recruit and Retain a Generation

Tours included: Guided and self-guided tours of the New England Air Museum.

**6/18/2024** –University of Rhode Island Narragansett Bay Campus– Educational sessions included:

1. URI Narragansett Bay Campus Master Plan
2. Panel Discussion of Custodial Staffing Models
3. Cyber Security Awareness for Facilities Managers

Tours included: R/V Endeavor Research Vessel, URI Nuclear Research Facility. Robert Ballard’s Inner Space Lab.

### **Upcoming Chapter Events**

November 2024 – University of Massachusetts, Lowell

March 2025 – Joint SNEAPP/NNECERAPPA Multi-day conference

We are fortunate to have a relationship with John Cannon who is retired from the College of the Holy Cross and is a professional architecture photographer. He attends our meetings and captures moments like these from the past year:









### **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 pre-pandemic numbers. We are also finally seeing a shift of more educational members attending and ratios at meetings have been close to 50% EDU to 50% business partner.

### **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. In 2024 we awarded all 4 of the scholarships to:

- i. Tammy Goodale – Bridgewater State University

- ii. Bonnie Jacob – University of Rhode Island
- iii. Jerry Santos – Bridgewater State University
- iv. Heidi Cooper – University of Rhode Island

### **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