



**THEME: “CREATING THE NEW NORMAL”**  
**APPA OPERATING PLAN “3 PILLARS”: STRATEGIC INITIATIVES**  
**FY 2016-2017**

(NOTE: Vice Presidents/Committee Chairs Areas of Responsibility)

The theme for the coming fiscal year is “Creating the New Normal”. This theme is based on the need to do things differently by redefining, remaking, and reinventing ourselves and our routine processes to align with the shifting financial sands and rapidly changing education landscape. All this to significantly and measurably create a new normal for how we do business and ensure that we organizationally and individually keep up within this new environment.

**The 3 PILLARS are:**

- A. Redefining the Association**
- B. Remaking the Facilities Organization**
- C. Reinventing the Facilities Professional**

Each one of these pillars aligns with the existing APPA 2020 Strategic Plan and serve to undergird our overriding overarching goal “to become the association of choice” for our members by providing enabling tools for association, organization, and individual professional transformation. Noted below are the strategic initiatives that will drive the association closer to achieving that end and further buttress the 2020 Strategic Plan.

- A. REDEFINING THE ASSOCIATION:** It remains critically important that APPA continue its great work in conducting research, providing professional development programming, recognizing institutions and individuals for their best practices, and strengthening the engagement of our membership base. Yet, this year APPA will further redefine itself through a new Association Management System providing greater access to more data and information, and opportunities to improve the customer experience in more meaningful ways than ever before. The complex work of the Standards and Codes Council and its associated, targeted work groups will aid in aligning us with international standards and gaining a seat at the standards development table.

- a. Utilize an upgraded association management system (AMS) database to assess levels of engagement of APPA members and nonmembers in APPA products and services by Carnegie classification, years of experience, title/position, etc.**

#### STAFF/ MEMBERSHIP

1. Upgrade the membership database with an AMS (association management system) that will allow for greater functionality and enhance use across the membership. *(Responsible Party(s): Staff/ Members & Committee focus groups; phase 1 to “go live” December 19, 2016; phase 2 in development to include Certification & Speakers Bureau); we are live with phase 1 of the new AMS and preparing for phase 2 work on Certification, Events, FPI, and Job Express as of January 3, 2017; phase 2 remains in play and should be completed by the end of August*
2. Explore various engagement assessment tools that could help us establish truly meaningful quantitative and qualitative measurements and methods, then determine future targets/ goals. *(Responsible Party(s): Staff develop using the new AMS once familiar with AMS functionality; Fall 2017; as part of the new AMS we will have an “engagement scoring” tool available to us; work has begun spec’ing out this tool with roll-out expected by end of year (January 2018)*
3. Determine how best to apply the Ten Practical Steps of Employee Engagement (from Bob Kelleher’s body of work) in a membership organization context.
  - i. Deliver the Engagement Workshop to interested regions’ boards and/or regional conferences. *(Responsible Party(s): Staff/ Volunteer Trainers; Fall 2016 or Spring 2017; NO uptake at this time)*
  - ii. Consider the Engagement Workshop as a possible new institutional professional development offering. *(Responsible Party(s): Staff; Winter 2017; NO uptake at this time)*

- b. Create an online environment through the APPA website that produces value for members and establishes a potential path for full engagement.**

- i. *I&R working on suggestions for updating the content, location, and dissemination of our “CMS”...the logistics of same; I&R is undergoing a 2<sup>nd</sup> review at this time*

#### INFORMATION & RESEARCH

- c. Create customizable APPA member interface(s) to provide and encourage creation and use of information and research (which could include the APPA website, mobile apps, use of social media, and other self-driven engagement opportunities).**

**STAFF /INFORMATION & RESEARCH/  
PROFESSIONAL AFFAIRS/ PROFESSIONAL DEVELOPMENT**

1. Upgrade APPA's CMS (content management system) to enhance the technology platform to create a seamless user experience. *(Responsible Party(s): Staff/ Member & Committee focus groups; Spring – Fall 2017; TBD based on available funds; I&R is presently reviewing the content and ease of retrieval for suggestions on upgrades and enhancements; phase 2 of their review is underway and should be complete by September 2017)*
2. Increase reader and member search, retrieval, and interactivity with *Facilities Manager* magazine articles and BOK (Body of Knowledge) content through opportunities to comment on articles/chapters online, speak with authors via webcasts, added "how-to's," and other such means.
3. Provide "quick hits" with tools for/ of the trade for posting on the website. *(Responsible Party(s): Professional Affairs; Summer 2017); on track*
4. Enhance professional development programming with on-line and social media delivery tools for broader use by the membership. *(Responsible Party(s): Professional Development Committee; Summer 2017; committee discussed targeted topics and regional engagement/ enhancements during their December 2016 meeting)*

- d. Implement a concerted membership retention and recruitment approach that promotes greater communication of the APPA brand and its value proposition.**

**MEMBERSHIP**

1. Create effective cross-communication and engagement between APPA membership committee and regional membership committees. *(Responsible Party(s): Membership Committee/ Regional Membership Committees; Summer 2017; discussed specific ways to enhance this type of engagement at their December 2016 meeting)*
2. Build on the theme of "Why APPA?" and promulgate brand affinity across the entire APPA membership network using the new marketing

materials now in place and outlining a clear communications strategy. (Using “Why APPA?” brochure/ article for Mexico institutional membership recruitment strategy.)

- a. Begin with incorporation in the President’s message at the regional fall conferences. (*Responsible Party(s): Medlin/ Presidents or his designee; September 2016; completed*)
- b. Staff develop and deliver marketing communications strategy. (*Responsible Party(s): Staff; Winter 2017; in place and working it*)

**e. Expand current social media strategies to include Facebook, Twitter, YouTube, and LinkedIn to increase brand awareness, membership services, and engagement opportunities.**

1. Staff development of an overall plan for increased utilization. (*Responsible Party(s): Witters; December 2017); much work has been done to increase and enhance Twitter feeds*)
2. EPs planned use to attract more individuals to the profession and the association. (*Responsible Party(s): EP group/ Board Regional Representatives; Witters assigned as staff liaison for the Eps & increased involvement by the Membership Committee in EP’s engagement; Fall 2017 – Spring 2018; changed name to AYP (APPA Young Professionals) and reassigned to Membership Committee*)

**STAFF/ EMERGING PROFESSIONALS/ BOARD REPS/MEMBERSHIP**

**f. Develop more personalized “touches” via a multitude of mediums.**

- i. Create TED-like Talks and 2-minute or less video clips (e.g., addressing an individual’s journey with APPA to enhance their career strategies; on-boarding new institutions/ organizations; describing APPA available content within existing APPA programs, products, and services; quickly elaborating new knowledge and research; etc.). (*Responsible Party(s): All Committees/ Staff/ EPs; develop one talk or clip per committee and EPs February – June 2017); (PD identified processes for capturing the APPA journey/ testimonials via mini-TED Talks)*)

**STAFF/ EMERGING PROFESSIONALS/ ALL COMMITTEES**

**B. REMAKING THE FACILITIES ORGANIZATION:** As an institutional membership association, APPA by definition, supports and promotes the work of the overall institution and its facilities organization. The focus this year is best outlined in the most recent Thought Leaders Symposium (delivery April 2016) where the focus was on the engaged employee becoming more customer-centric. The forthcoming Thought Leaders monograph will help us better understand how other industries and our innovative peers are anticipating change, reacting to change, and creating their own new normal. We will also highlight and further emphasize specific enabling tools for members to use in creating their own transformational pathways. We need to communicate the sense of urgency related to facilities, the largest asset on any campus, to senior institutional officers. APPA is in a great position to assist in developing that message.

**a. Proactively initiate partnership and collaboration opportunities that enable APPA to collectively pool strengths with external organizations.**

**PROFESSIONAL AFFAIRS/ PRESIDENTIAL TRIAD/ STAFF**

1. Establish and maintain productive partnerships by exchanging articles, collaborating via information exchange and research projects, and advertising/marketing in associated journals.
  - a. Continue strong ties and relationship-building with NACUBO & CAUBO, especially in the area of performance benchmarks, measures, and metrics. *(Responsible Party(s): Staff; develop eight additional facilities performance metrics and executive level white paper from FPI dataset; Spring 2017). (Responsible Party(s): Staff working with NACUBO & CAUBO on better FPI metrics and data given a new MOU; Fall 2016 - Summer 2017)*
  - b. Create an enhanced version of the Key Facilities Metrics for use by Senior Institutional Officers. *(Responsible Party(s): Staff/ Volunteer Users/ Association Partners; Spring 2017) Staff exploring opportunity to engage APPA ASCC Informatics Workgroup to provide enhanced Key Facilities Metrics as part of re-haul/improvements to the current FPI survey instrument and reports; work session with TCO, Informatics WG, and FPI interested parties occurred June 20, 2017 to discuss next steps...debut of potential approach will occur at the APPA 2017 Conference*

- c. Target chief business officers (CBOs) and other academic officers/faculty to convey the value of APPA and gain support for the educational facilities profession. *(Responsible Party(s): Staff; deliver presentation(s) at NACUBO conference and new CBO's and their Planning & Budgeting Forum; Summer 2016 & Fall 2016); completed*
  - d. Establish further dialogue with ASHRAE concerning their Building Energy Quotient (bEQ) program and many other areas of interest outlined in the most recent MOU. *(Responsible Party(s): Presidents/ work with University of Nebraska, Lincoln to pilot beta approach with Tim Wentz; Meeting conducted with ASHRAE on December 1, 2016 to continue roll-out of details around the MOU and specifically the bEQ project; plan established for a short and long term engagement regarding the bEQ to include more immediate use by our SFOs and a longer term focus on students and engineering faculty; Winter 2017) ASHRAE to conduct second bEQ education session (first was APPA 2016/Nashville) at upcoming APPA 2017; 2<sup>nd</sup> bEQ session delivered at the ASHRAE conference in June 2017 and will follow with one at the APPA 2017 Conference in July 2017*
  - e. Discuss areas of real opportunity for possible “win-win” with USGBC. *No renewed conversation to date.*
  - f. Determine continued viability of collaborating with SEI/ GRITS. *(Responsible Party(s): Staff/ SEI, Mark Orlovsk; work outcomes of the two-year agreement and next steps forward; September 2016; completed; Begin new negotiations on the high-end user package on behalf of APPA and MiAPPA; conversation in progress; January 2017); APPA will continue its efforts and is establishing a new focus on Business Partners to engage*
  - g. Determine further efforts to target important initiatives by and between our International Strategic Alliance Partners. *(Responsible Party(s): Presidential Triad/ Staff; continue work on the Top 10 actions previously identified; Winter 2017); APPA staff engaged with AUDE counterpart, Jane White, to exchange ideas and best practices*
- b. Initiate a standards and codes program that expands the value of APPA membership to institutional facilities/physical plant employees and increases opportunities to participate.**

**APPA's STANDARDS AND CODES COUNCIL**

1. Monitor standards and codes trends and educate members on those trends before they impact educational institutions, hence active code advocacy.
    - a. Continue to use our collection of workgroups targeting NFPA, ICC, Informatics, and Cleaning standards; *much progress being made with workgroups established in all areas; NFPA workgroups have been established; the Informatics workgroup met in mid-December 2016 to target their short and long term efforts for dashboards, metrics, and data gathering strategy; Informatics WG is dovetailing their efforts with FPI's*
    - b. Actively participate and/or lead activities on the ISO TAG for facilities asset management; *in progress and being led by Ted Weidner and John Bernhards; Ted will attend the next international meeting to be held this spring 2017; APPA hosted the June ISO TAG meeting*
  2. Continue work by the TCO Work Group to establish an ANSI standard for facilities performance; *expect delivery of initial work in the Spring 2017 and more by the end of 2017; program of work is presently three weeks ahead of schedule. Currently on track to announce public review of APPA 1000 "Total Cost of Ownership for Facilities and Infrastructure" during the APPA 2017 conference in July.*
  3. Continue work by the Informatics Work Group to establish a dashboard of key building metrics; *expected to meet in December 2016 and discuss input and output deliverables; the Informatics workgroup conducted an executive session in mid-December 2016 to target their short and long term efforts for dashboards, metrics, and data gathering strategy; Dovetailing outcome efforts with the needs for FPI enhancements;*
  4. Utilize our newly established ANSI standards development organization authorization to produce pertinent standards and codes on behalf of the profession. (e.g., promulgate facilities terms and definitions, etc.); *Work is in full swing on the first TCO standard; terms & definitions standard (ANSI/APPA 1100 is also in development and will result in an online glossary and member interface for ease of access and use on the APPA web site; APPA will debut the TCO standard (as it readies for public hearings) along with the terms and definitions element at the APPA 2017 Conference*
- c. Further develop and provide online education delivery offerings using the APPA online learning portal.**

**PROFESSIONAL DEVELOPMENT/ STAFF**

1. Work with CMMS suppliers to get significant uptake and use of the Staffing Trilogy Guidelines in their work order management systems. *(Responsible Party(s): Staff; Winter 2016; TMA has already taken advantage of our annual licensure approach and we will be encouraging others in the coming 2017 year; we are exploring another user “DabbleFox” for a similar licensure; letter sent to begin this dialogue and confirm proper use*
2. Provide just-in-time offerings developed and accessed via the website through enhanced or new technologies.
  - a. Finalize work on delivering the Custodial Staffing Guidelines as an on-line learning tool. *(Responsible Party(s): Professional Development Committee/ Staff; expect rollout of the Custodial Staffing portion in Fall 2017; work is in full swing with the first set of storyboards in place and a larger conversation for engagement and support by/with ISSA; work is back on track with 4 of 6 modules completely storyboarded*
  - b. Begin work to also deliver the other two staffing guidelines (Trades Maintenance and Grounds Management) via the on-line learning tool. *(Responsible Party(s): Professional Development Committee/ Staff; Winter 2018)*

**d. Create customizable APPA member interface(s) to provide and encourage creation and use of information and research (which could include the APPA website, mobile apps, use of social media, and other self-driven engagement opportunities).**

**STAFF/ INFORMATION & RESEARCH/ PROFESSIONAL AFFAIRS/  
PROFESSIONAL DEVELOPMENT**

- i. Review and update Facilities Performance Indicators (FPI) technology and functionality to support an enhanced user experience for data collection and improving the online report. *(Responsible Party(s): Information & Research Committee/ Staff; Summer 2017; already exploring the potential use of our AMS to handle the FPI inputs and outputs; significant discussion occurred with the Informatics Workgroup to team up on the dashboards and metrics...much more to be done; meeting held June 20 to connect each interest groups' thinking...will debut approach(s) at the APPA 2017 Conference*
- ii. Create an enhanced version of the Key Facilities Metrics for use by Senior Institutional Officers. *(Responsible Party(s): Staff/ Volunteer Users/ Association Partners; Spring 2017); eight metrics have been identified and we are planning to use as the basis for targeted volunteer review; these metrics will be used as the basis of the first new delivery tool*

- iii. Create a multimedia content library of video content, post-conference presentations, audio files, best practices, and other reference material for ease of use and retrieval by FM organizations. *(Responsible Party(s): Staff/ Multiple Committees/ Information & Research Committee will work with Professional Development Committee for several; Summer 2017)*
  
- e. **Target research efforts and information gathering on content areas that will focus on needs of the facilities management profession now and well into the future.**

#### **INFORMATION & RESEARCH/ BOARD REPS**

1. Expand on topical areas identified through general membership surveys, Thought Leaders Series outcomes, the revitalized BOK, and environmental scans to supplement an updated content management system. *(Responsible Party(s): Information & Research Committee/ Board Regional Representatives; discussion at the December 2016 committee meeting targeted potential topics along with that of PAC; Winter 2018)*
2. Develop a process for expanding APPA's research effort. *(Responsible Party(s): Information & Research Committee; January 2018); I&R has solidified its approach and is working its plan*

**c. REINVENTING THE FACILITIES PROFESSIONAL:**

Deferred professional development is more critical to address than deferred maintenance. Life-long learning is a must for today's facilities professional. APPA will continue to develop new, and improve existing, professional development offerings. New mentoring and internship programs are currently in process for networking and developing our future leaders. Discounted rates for credentialing, now offered by the regions, provides a concerted opportunity to help each individual invest in, and reinvent, themselves.

**a. Develop and implement onboarding actions and activities for engagement with a clear focus on relationships and networking.**

**MEMBERSHIP/PRESIDENTIAL TRIAD**

1. Utilize the progress already made to further target constituency groups such as HBCUs, community colleges, K-12 schools, and Mexico-based institutions to gain their specific involvement individually and institutionally. *(Responsible Party(s): Membership Committee/ Presidential Triad/ Volunteers; with plans & on-going targeted activities throughout the year - Summer 2017; much progress already being made with both the HBCUs and the Mexico contingent; a formalized, structured on-boarding call occurred with each of the newly elected officers in early May*

**b. Effectively promote the newly launched "Mentoring" program for broad use by the existing membership.** *(Responsible Party(s): Professional Development Committee/ Mentoring Task Force; monthly calls commenced and materials are available on the website; PD had a good discussion about more effective ways to roll-out this new initiative...John Morris to continue his leadership in this area; Summer 2017; done...now we need more folks to sign-up; this effort will now be moved under PACs area of responsibility*

**c. Given the direction to establish a task force to further flesh out a viable "Internship" program, complete final recommendations for program establishment.** *(Responsible Party(s): Board Regional Representatives/ Selected Task Force members; nine members in place and work is being done to finalize a substantive proposal for Board review and consideration; work remains on track;*

*Summer 2017; expect a recommended programmatic approach to be completed by Fall 2017*

- d. Expand current social media strategies to include Facebook, Twitter, YouTube, and LinkedIn to increase brand awareness, membership services, and engagement opportunities.** *Responsible Party(s): Kristin Witters assigned as primary staff contact to establish preliminary plans; the new AMS will provide tools to enhance our engagement in this area; Summer 2017); much work has already been done by Kristin Witters and her team*

#### **STAFF/ OTHERS?**

- e. Focus on EPs' needs for succession planning, career enhancement, and promotability through delivery of an individualized summit with senior facilities officers (SFOs), active use of social media/networking, and provision of other "local" deliveries.**

#### **EMERGING PROFESSIONALS**

1. Establish succession planning for EP Summit activities by having several facilitators assist in program development and/or engagement of the EP team throughout the year.
2. Use the APPA EP Summits as a bridge to the Institute program.
3. Continue to focus on regional deliveries of their own version of an EP Summit.
4. Increase local delivery of programs via on-line programs-credentialing CIL, all levels of the Leadership Academy, and more Toolkits and Drive-In Workshops.
5. Utilize new chapters to encourage more EP engagement.

- f. Establish more meaningful interactions and broader access to the membership network for EPs by expanding mentorship programs across all levels of the association (possibly use the new Mentoring Program to meet these needs).**

#### **EMERGING PROFESSIONALS**

- a. Partner with the EP's to work on the meaningful interactions through the Mentorship Program and the Regional delivery of their own EP Summit. *(Responsible Party(s): EP Group/ Board Regional Representatives; Summer 2017)*

- g. **Explore the use of experiential learning-based programming to address the major concerns and issues gleaned from the Fall 2014 General Membership Survey results.**

**PROFESSIONAL DEVELOPMENT/ EMERGING PROFESSIONALS/  
BOARD REGIONAL REPRESENTATIVES**

- h. **Continue to finalize the content of the Graduate Program at the Institute for broader based participation/ attendance by and for the membership.**

*(Responsible Party(s): Professional Development Committee/ Graduate Program Faculty; program now launched and open to all Institute & Academy graduates; we are now charging a fee for this program and just marketed to all Institute/ Academy graduates from the past three years; January 2017)*

- i. **Prepare and deliver individual journey testimonials for all areas of the Professional Development continuum.** *(Responsible Party(s): Professional Development Committee; December 2016 AND Board Regional Representative; PD engaged in much discussion on the form, shape and timing of these testimonials; Spring 2017)*

**PROFESSIONAL DEVELOPMENT/ MEMBERSHIP/  
PROFESSIONAL AFFAIRS/ INFORMATION & RESEARCH/  
BOARD REGIONAL REPRESENTATIVES**

- j. **Continue to expand the market for the credentialing program's new products, services, and materials to a broad range of stakeholders and constituency groups.**

ii. Continue to market and increase use of credentialing coupons across all regions. *(Responsible Party(s): Staff/ Regional Presidents; on-going through 2017; ALL regions and the state chapter MiAPPA are now offering the discounted program and 372 individuals have taken advantage of the coupon offers!; the program is continuing to grow with new coupons available specifically by ERAPPA, MAPPA, and MiAPPA; all regions are supporting coupon use...we will crest 1,000 credentialed individuals by the APPA 2017 Conference!*

iii. Continue to flesh out facilitators for the On-line Learning course. *(Responsible Party(s): Staff/ Credentialing Board/ Volunteers; on-going through 2017); we have doubled the # of facilitators to date*

- iv. Develop GSA-related FBPTA (Federal Building Personnel Training Act) matrix work to align with Credentialing program's course work. *(Responsible Party(s): Staff/ Credentialing Board; on-going through 2017); work is now complete and we are just awaiting the open period for submission of our materials for their consideration!; we had our first round of reviews of our submittals in May and are tweaking our submittal accordingly*
  
- v. Begin work on ANSI program accreditation checklist to achieve this designation. *(Responsible Party(s): Staff/ Credentialing Board; on-going through 2018); the accreditation is in reach given recent work by the staff to lay out the checklist and finalize the remaining items for submission of our application!; we expect this could occur by next fall 2017; we remain on track for submission in early Fall 2017*
  
- k. Use the new video clips and other marketing promotional materials to brand the program across the industry and beyond (e.g., GSA and other federal agencies).** *ALL regions have their own personalized video clips along with new website promotional materials in place. Working with new marketing team to augment, supplement, and further enhance our materials.*

**CREDENTIALING BOARD**