

# A Guide to APPA Chapter Growth



## Thank you for your interest in APPA Chapters!

Whether you are creating a new chapter or are stepping into a leadership role in an existing chapter, the APPA staff is ready and willing to help you make your chapter a success! In addition to this guide, we can help you identify institutions – both members and non-members – in your area, assist with event planning logistics, and more!

**APPA Membership** [membership@appa.org](mailto:membership@appa.org)

**APPA Professional Development** [education@appa.org](mailto:education@appa.org)

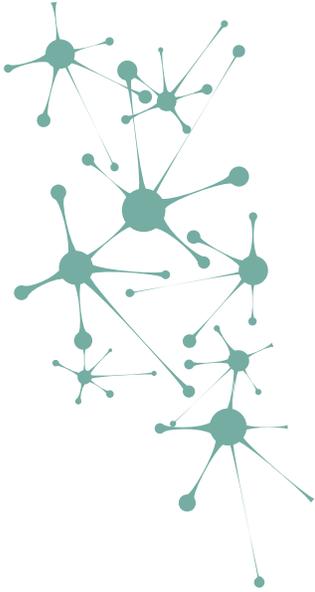
**APPA regions** <https://www.appa.org/regions/index.cfm>

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## BENEFITS OF APPA CHAPTERS



A state or metro-area APPA chapter provides the benefits you expect from APPA – professional networking, professional development opportunities, and education – at a local level that allows members to share experiences and address challenges unique to their campuses. Chapters offer the opportunity for grassroots networking, collaboration, and localized professional development activities that can help strengthen the educational facilities profession by addressing real-time shared issues faced by facilities in your area.

Just as you depend on APPA for quality products, services, and career-building opportunities, APPA depends on its members to help spread the word

and introduce the professional benefits of APPA throughout your educational facilities community. Only with your assistance can we increase the APPA membership at the chapter, state, and regional levels, as well as advance awareness about the educational facilities profession.

Local chapters have the opportunity to cast a broad net, offering professional development and networking opportunities that require a lower threshold of cost and time commitment from potential new members. Bringing in these new voices and perspectives could be the key for identifying new challenges that face our evolving industry and best practice solutions to address them.

## HOW TO CREATE A SUCCESSFUL APPA CHAPTER

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### KEY DECISIONS

Geographic Boundaries

Name/Acronyms

In addition to the excitement, passion, and zeal needed to start a new APPA chapter is the hard work of finding equally passionate and excited members to volunteer their time and effort. The good news is that once your core group has been established, there is no need to start from scratch. Existing chapters, your APPA region, and APPA International can provide guidance and a framework to help you through the necessary steps to establish a new chapter. Including a member of your APPA regional board and an active APPA business partner in the initial core team establishing the chapter will help align the chapter with existing regional activities and protocols.

Two key decisions that should be made quite early in the process include: 1) geographic boundaries for the chapter; and 2) names/acronyms for the chapter that identify the brand and setting for your chapter. Setting a geographical boundary for the chapter can be challenging, so it is important to focus on mapping out a boundary that provides the best opportunities for reduced cost and time for in-person gatherings and networking.

There are two parts to establishing a successful chapter. Creating the legal entity and establishing a board and by-laws. At the same time the business side is being established, it is critical that the creative juices keep working so the chapter can launch with exciting and relevant activities to attract and maintain existing and potential APPA members.

## HOW TO GET STARTED: NUTS AND BOLTS

**Below are the steps to get started.**

1. Host a mixer or informal get together to generate interest in chapter formation
2. Establish Articles of Incorporation in the state
3. Establish chapter bylaws, including position descriptions for the chapter board; create logo - APPA can assist with design
4. Hold your first formal meeting and establish resolutions
5. Obtain an EIN Number for the US Internal Revenue Service
6. Establish tax exempt status with the US Internal Revenue Service
  - a. A new chapter can either request its own tax-exempt status or utilize “group exemption” by becoming a subchapter of APPA. The benefit of falling under APPA is that the status is immediate.
  - b. APPA will send a letter to the IRS if the new chapter decides to fall under APPA’s tax exempt status.
7. Completion of Guiding Principles for Organizational Affiliation
  - a. Signed by the chapter officer, an officer of the APPA region, and APPA. This document is a description of the roles of APPA, the region and chapter. It clarifies various roles and purposes and support of one another.

Start the formation of your chapter by holding a “mixer” or informal meeting of interested parties within your state and evaluate the level of need and interest. APPA can provide you with a list of member and non-member institutions within your state. Simply email [membership@appa.org](mailto:membership@appa.org) for the most recent list. Once you’ve created “buy in” and established a mandate to create a chapter, it’s time to get down to business.

Once your chapter is established, consider hosting your annual meeting for members within your state. Keep reading for some helpful hints for hosting a successful chapter meeting.

## HOW TO GET STARTED: PROGRAMMING

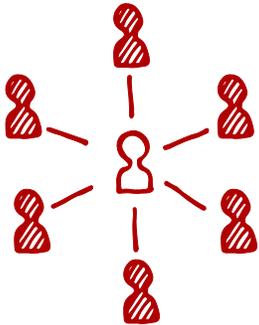


Sharing your experiences about membership in APPA can be a pivotal way to encourage colleagues and peers in the profession to join APPA. Potential members want to see and hear about your involvement in APPA, so share specific stories of how APPA membership has been of great value to your professional career and personal growth. Show them how demonstrating involvement on the local chapter, region and APPA level can benefit them and their institution.

For a new chapter, hosting a full conference with speakers, break-out sessions, and exhibits may be overwhelming. As you start off, smaller-scale events may be easier to organize and attract new

faces as you build the chapter. You may discover that certain types of events are more attractive to facilities professionals in your area. Focus on what works for your chapter!

- Networking forums
- Campus tours of new state-of-the-art facilities or installations
- Speakers series: regulatory impacts specific to your state; local climate/energy challenges; local population forecast implications for campus in the future
- Chapter coordinating with Business Partners and APPA to host drive-in workshops



## Planning for a Meeting/ Conference

There are many basic details to consider when establishing the level of desire for hosting a regional or chapter meeting. Policies and procedures need to be established in order to determine what decisions need to be validated by organizational boards, such as budgets, meeting locations, events, and program content.

In anticipation of the involvement needed, as well as the reality of balancing your job responsibilities, the following recommendations help outline divisions of duties:

**Host Committee** – This group of volunteers would be responsible for the structure of the event such as:

1. Establishment of Conference Dates
2. Establishment of Conference Location
3. Development of Conference Budget
4. Engagement with all service providers (i.e. hotel/facility, A/V, transportation, etc.)
5. Set up of Registration
6. Management of Conference Website

**Programming Committee** – This group of volunteers would be responsible for establishment of content for educational breakout sessions as well as keynote session.

**Exhibitors/Sponsorship Committee** – This group would be responsible for soliciting exhibits as well as business partners for sponsorship support.

Regional and state conferences require a lot of planning and structure; however, there are no rigid guidelines or magic formulas. Structure will vary from group to group and meeting to meeting.

Registration for your chapter meeting should run through the APPA database. This allows for you to benefit from real-time membership status, contact information and seamless tracking of membership engagement. NOTE: While your event would run via the APPA database system, the host entity will be required to establish your own bank account as well as payment interface. This is an audit requirement as APPA will not manage/engage/touch your event funds.

## Dates

Dates for the meeting should never conflict with APPA annual meeting, APPA U, or other nationally advertised APPA events. You are encouraged to check with the APPA regional and state organizations within APPA via the website to avoid conflict.

Now that you have avoided a meeting conflict, there are several other considerations to picking a date.

- **Availability and price of hotel and meeting rooms.** You may get a better deal on price if you are not in a hotel's high season for conferences. This needs to be a balanced decision with respect to other factors.
- **Holiday schedules.** Aside from checking religious/governmental holidays for US, Canada & Mexico, you should also try to determine if you will fall into a winter or spring break or other potential conflicts for educational facilities professionals.
- **Availability of key speakers.** If you have a key speaker in mind, you may want to check on their available dates before finalizing the date selection. This may not be an issue since most regional and chapter meetings are planned at least a year or two in advance.

## Timeline

It is helpful to begin a timeline at the beginning of your conference planning process that outlines all activities. Details should include: who is responsible for planning sessions, who is responsible for planning networking receptions, time frames for mailings, printing, etc. Another item to consider is how many weeks before the conference should a final registration date be set. Be sure to check if any holidays may affect a response to mailings. APPA has developed a detailed task list that encompasses the entire planning process, from planning the logistics to marketing the conference.

### Location: City

Picking a city for the conference is similar to picking a date for your event. Your conference group should consider if you have a core group of volunteers willing to assist with local arrangements. If multiple cities in the state or region are suggested, consider which city has the most appeal and the best transportation system.



### Location: The Facility

Negotiating the contract for your event, which could include hotel or convention facility, will be one of the more critical tasks involved in organizing a conference. Here is a sampling of items to consider:

- If you will be having an exhibit hall, where will the exhibitors be located?
- Does the facility have in-house drayage services? Can this be negotiated into the contract? If not, are there preferred vendors that need to be considered?
- What is included in the food service? What is the minimum amount of food that you are obligated to order? What taxes & gratuities will be levied?
- What A/V equipment is provided? What additional inventory would the facility be able to provide? Will discounts be offered if in-house providers are used?
- Is WIFI free in the meeting space?
- Are you following local and federal laws (i.e., copyright issues and the Americans with Disabilities Act).

The APPA Professional Development staff are a valuable resource for you. They are always happy to assist in reviewing contracts prior to signatures.

### Space

When considering how much space your conference will require, you will need to look at your event holistically ensuring space for registration, meals/receptions, exhibits, keynote speeches, and educational sessions.

### Exhibits

Depending on the desired outcome of your event, you may wish to consider the inclusion of exhibits as a revenue generating line item. Should you progress in this direction, the following should be considered:

- What hours will the exhibits be available vs educational time?
- What type of space would the facility be able to provide? Would there be an additional rental fee for this space? NOTE: Request a CAD drawing to confirm the actual space that would be utilized.
- Will exhibits be tabletops or booths?
- If there are setup costs, who provides the labor and pays for the setup?
- How many dedicated hours should be devoted to exhibits?
- Is security needed? If so, can this be negotiated in your facility contract? If not, what suppliers does the hotel suggest? NOTE: In any situation you want to use facility recommended suppliers to save on added possible insurance fees.
- How many total exhibitors should you allow given the respective number of attendees?

### Meals

One of the largest sections of your event development from a fiscal matter will be your food & beverage area. Key items to keep in mind for purposes of negotiation with the chosen facility as well as budget expectations are the following:

- How many meals will you be serving?
- What is the establishment of your per head cost to include meal, taxes and services fees / gratuities?
- Will you be offer a cash or sponsored bar? NOTE: for either version bartender fees will be assessed.
- How many extra meals will they have available for on-site registrations?
- Will outside vendors be allowed to serve meals/food/alcohol?



### Technical/AV Requirements

As a part of your budget development, as well as facility negotiations, you will need to determine what type of AV requirements are necessary for the event as whole.

- Will you be required to utilize in house vendors or can you negotiate for outside vendor support?
- In establishing your breakout sessions, advise your presenters that they are to supply their own laptop. NOTE: Verification of which platform will be necessary to determine capability with the facility.
- What type of AV set will you have for your session rooms – LCD Screen w/ projection? Flipcharts? Microphones? Wired vs. Wireless?
- Will WIFI be provided in all the meeting space?



### Miscellaneous

The following is a list of documents that may be helpful to you as you form your chapter and increase involvement.



#### APPA Bylaws

*Example of Regional Bylaws* – visit regional sites to view bylaws



#### APPA Affiliation Agreement - Appendix A

### Headquarter Support

Planning a meeting is time-consuming; however, it can be a rewarding experience for you and your organization. APPA's Professional Development team is available for any questions that may arise when planning your meeting.

### Insurance Issues

If you have any questions regarding what type of insurance is required for your meeting, do not hesitate to contact the APPA's Professional Development team or Finance and Administration director.



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