

A P P A ' S   S T R A T E G I C   P L A N



**Preparing for  
Every Future**



# APPA'S STRATEGIC PLAN

## Preparing for Every Future

### INTRODUCTION

Changes in educational facilities management are happening simultaneously, exponentially, and interdependently at the same time that higher education is at a critical juncture. The many forces of change within and around the institution and the facilities profession are being shaped and defined at an increasingly accelerated pace. While this makes it difficult to predict a sustained future state, it is evident that educational facilities managers will need to be able to adapt and develop as their futures rapidly unfold. In addressing this need, no other association or professional organization is better positioned than APPA to leverage and build upon the strength of their brand of education and community in preparing their members for every future.

Futurists are aligned by the belief that the key to succeeding in an ever-changing world is to never stop learning. As Stephen M. R. Covey stated in his book *The Speed of Trust*, "unless you are continually improving your skills, you are quickly becoming irrelevant." More recently, in his book *Thank You for Being Late: An Optimist's Guide to Thriving in the Age of Accelerations*, Thomas Friedman argues "when the pace of change gets this fast, the only way to retain a lifelong working capacity is to engage in lifelong learning." Jeff Selingo, in his recent *Atlantic* article on the Third Education Revolution, postulates that the educational landscape was dominated by the high school degree for 50 years before yielding to the college degree for the last 50 years. Now, he says, "schools are moving toward a model of continuous, lifelong learning in order to meet the needs of today's economy." This third revolution is one where continuous learning will be the expectation.

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With this in mind, APPA leaders realized that the association needs to be ready to meet the demand for continuous learning and skills building that will be core to the success of its members effectively serving the ever-changing needs and demands of their institutions. The spring 2018 APPA Member Survey reinforced the value members place on professional development and training, and identified the critical and evolving issues that continuous learning offerings need to address. The member survey responses, and subsequent analysis by experienced practitioners and current association leaders, recognizes that APPA is well positioned to build on its successful foundation of providing professional development and enabling community. APPA provides the place for members to keep pace with the ever-changing and ever-growing demands of the profession.

## Strategic Vision: Creating a Future of Continuous Learning

APPA leadership developed a vision that would create a future of continuous learning for its members, and then developed the 2018 Strategic Plan to provide a strategic framework and principles that will provide a bridge from the present to the future.

**Address, Adapt, Adopt & Apply:** APPA will be increasingly relevant as current members and future generations of facilities managers pursue lifelong learning as a means of addressing the challenges of educational facilities funding, adapting to the evolving workplace and workforce dynamics, adopting new and effective means of communication, and applying technology, analytics, and artificial intelligence in building the smart campuses of tomorrow.

**Meeting the Needs of APPA Members:** The 2018 Member Survey revealed the challenges of greatest concern to our members: aging infrastructure, workforce skills gaps, succession management, budget challenges, increasing workload demands, and more. In addition, it reinforced the value that our members place on APPA, and identified professional development and community as important strengths upon which to build. The survey responses also informed the strategic planning effort with information about who our members are, including what backgrounds they had before entering our profession, and their years of experience. This highlighted the need to provide developmental leadership and adaptive training across the generations representing our members, and drove our efforts to tailor a plan that meets the needs of an evolving demographic profile.

While many of the issues and concerns identified in the survey are similar to previous surveys, APPA's strategic response to those issues is departing from the strategy of previous years, during which we continued to try to do all things better. This strategic plan will pivot the association to build on its core strengths in professional development and community to become the premier continuous learning provider for our profession. The continuous learning platform will offer members access to information, learning opportunities, and peer-to-peer learning. Continuous learning activities will respond to the members' needs expressed in the survey by:

- Appealing to the diverse interests across workforce generations
- Preparing transitioning professionals for careers in education facilities management
- Informing members on strategies and practices for addressing the challenges with aging infrastructure
- Preparing the profession to manage budget transparency, promote value-based investments and address operating and renewal funding challenges
- Enabling members to keep pace with emerging technologies and data analytics
- Mitigating and reversing the widening skills gap by training the workforce of tomorrow
- Equipping leaders with the soft skills increasingly demanded in today's complex work environments.

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## Strategic Framework

In creating a future of continuous learning for APPA members, a number of strategic initiatives will be launched and pursued through a structured strategic framework. The structured strategic framework provides an organizing element around which APPA committees, APPA staff, and association leaders will align and direct their efforts to build the continuous learning infrastructure using four supporting pillars: educational content, educational delivery channels, supporting infrastructure, and collaborative learning. Rather than provide a checklist of actions to be taken, the four pillars of this strategic framework offer broad areas

of opportunities to engage and harness the energy, creativity, and contributions of volunteer members, APPA staff, supporting business partners, and collaborating professional associations.

## **Educational Content**

Building the continuous learning infrastructure begins with the educational content. At the international level, APPA is ready to develop a wide breadth of educational content and create a “course catalog” of instruction. APPA has demonstrated its success in developing content through the curriculum offered by the Institute, Academy, and Supervisor’s Toolkit. APPA’s content development has been limited more by the methods of delivering this content (for example, through APPA U, annual and regional meetings, etc.) than it has been by the capacity of our members and business partners.

In addition to developing APPA’s own content, APPA will also adopt an emerging trend to curate content. This means finding existing content elsewhere that has value to our members and offering those courses through APPA. This could include courses offered by other professional associations (ASHRAE, COAA, SCUP, NACUBO, etc.) and courses developed by our business partners or by our members for APPA and the regional annual meetings. As part of the APPA course catalog, the courses could be selected for delivery at any of the regional meetings, APPA U, local chapters, and even on campus.

## **Educational Delivery Channels**

The second pillar in building the continuous learning infrastructure is to create additional, varied, convenient, and cost-effective education and training delivery channels. The emergence of local APPA chapters and the increasing demand for on-campus training is contributing to effective delivery channels for content that may have previously been earmarked only for international and regional conferences.

As continuous learning becomes more important to APPA members and other practitioners, and more critical to organizational success, the delivery of content will need to be available locally, in a variety of formats. This learning platform needs to be built to deliver content on and offsite, at conferences, on campus, through

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webinars, as drive-ins, individually accessed, and through social media. It will encompass training that is formal and informal, credited and uncredited, scheduled and on-demand that span from a couple-of-minutes “how to” videos to week-long immersive training, and range from no-cost to the prevailing cost versions of APPA’s premier offerings.

## **Supporting Infrastructure**

The third pillar of the framework for continuous learning is to create the supporting technological and human infrastructure to address the increasing demand, as well as support the variety and range of content and delivery methods.

Building on APPA’s new Association Management System by retooling the website is the first critical step in leveraging existing content to support continuous learning. This will enable greater use of APPA’s existing collection of content. APPA’s most valued assets include the Body of Knowledge, *Facilities Manager* articles, Center for Facilities Research (CFaR), Effective & Innovative Practices, and Facilities Performance Indicators (FPI). APPA’s customized interactive learning platform is another valued and proven asset upon which to build. Other technological systems will need to be developed as content creation, curation, and cataloging steadily grows.

Equally critical is the development of APPA’s organizational capacity and staffing to provide the leadership, business, and marketing skills necessary to build a learning-centric association.

## Collaborative Learning

The fourth pillar leverages APPA's unique core strength, its network of community, to create peer-to-peer learning. Unlike traditionally developed and delivered content, collaborative learning teaches us what not to do, how to improve on what we did yesterday, and what we see coming tomorrow. In an age of accelerating and transformative change, collaborative learning offers synergistic, real-time, and fresh shelf life peer-to-peer learning. It encourages sharing and learning from those who have failed before and learned through those failures.

Collaborative learning is where APPA's differentiation will flourish because of our existing network of community. This pillar is dependent on the other three pillars of this framework. It takes the development and delivery of traditional content coupled with the physical or virtual community to stimulate the kind of dialogue that brings a collaborative learning experience. It expands beyond "what" we learn into the process of "how" we learn by integrating knowledge with practical experience.

APPA has the opportunity to leverage collaborative learning in a unique way based on the strengths of our brands: education and community.

## Strategic Principles: Specialization and Differentiation

**W**hat makes APPA the association of choice, according to the 2018 Member Survey, is that it brings members together as a community under the niche focus of managing educational facilities. APPA provides the physical and virtual places for members to share experiences and best practices, and build their skills, knowledge, and abilities. The strong peer-to-peer community and tailored educational content is what differentiates APPA from other associations.

Because APPA's value to its members is through its specialization and differentiation, the successful execution of the strategic plan will strengthen APPA's core activities. Geoffrey Moore, in his book *Dealing with Darwin*, refers to differentiation as an organization's core identity and competitive edge. Core activities are those

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that must be done to support the "brand." Everything that is not core is considered context. Context activities may be important, but they rely on the strength of the core activities to exist. For example, an accomplished athlete's performance on the playing field is the core activity. The endorsement contracts that the athlete may receive from that notoriety is context. If the core activity weakens, the athlete is likely to lose the income derived from endorsements.

As APPA moves forward on the strategic plan, the general rule will be to focus on strengthening core activities. Most context activities are important, contribute to organizational success and enable further investments in core activities. However, context activities take time, energy, and other resources that may be better spent on advancing new core initiatives and enhancing existing core activities. Every budget dollar or staff hour spent to support context activities is at the expense of advancing APPA's core activities. Financial and human resources must be reallocated in order to successfully advance APPA's Strategic Plan, requiring difficult decisions to be made to reduce or eliminate support of existing context activities. Additionally, it will require suspending the implementation of new context activities.

The following three principles must guide the efforts of APPA's Board and staff to support the Strategic Plan.

### Sharpen the Focus

APPA's primary focus has to be on core activities. In order to free the resources needed to enhance APPA's core, selective divestment and/or restructuring will be made relative to context activities.

## Strengthen the Core

Investments must be made in initiatives that align with the strategic vision and strategic framework and build the continuous learning infrastructure by enhancing educational content, increasing educational delivery channels, supporting infrastructure, and improving collaborative learning. By strengthening its core activities, APPA will increase its value, differentiation, and relevancy.

## Build Organizational Capacity

APPA will elevate and enhance its organizational capacity to strengthen its core and effectively pursue the strategic plan. This will include repositioning APPA staff, restructuring APPA's committees, and realigning relationships with APPA's regional and local chapters.

## Summary

*"It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change."*  
— Charles Darwin

The educational facilities management profession is experiencing transformational changes from innovations, technological developments, and institutional needs that will continue to occur at an accelerating rate. Facilities managers are recognizing that the key to success in an ever-changing environment requires continuous learning. APPA has developed this strategic plan framework and principles as an ongoing response to our evolving needs as we navigate our unfolding futures. With continuous learning as our aligning vision, APPA is ready to build on its core strengths, create greater differentiation for the association, enhance its relevancy for its members, and prepare for every future.





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