

APPA Diversity, Equity & Inclusion Task Force

Final Report to the APPA Board of Directors July 27, 2022

Background

In September 2021, APPA's Executive Committee formed a Task Force to focus on diversity, equity, and inclusion (DEI). With this commitment, the 2021-2022 APPA Board of Directors identified one of its high priority initiatives to advance diversity, equity, and inclusion principles and practices within APPA. This action reflects APPA's commitment to *prepare for every future* by formalizing its past and current practices around equity and inclusiveness for the association. Moreover, through this action APPA demonstrates a sustained and comprehensive commitment to establish an organizational climate that is just and inclusive – regardless of individual differences, beliefs, or identities.

Over the past ten months, the Task Force has worked diligently on its assignment and is pleased to present this final report for the Board's consideration. What follows is a summary of the work accomplished, including its Phase I recommendations, which were reviewed and approved by the Board in February 2022, as well as a complete set of Final Recommendations for the APPA Board and professional staff to make long term progress in support of this important initiative.

Task Force Charge & Membership

In launching this initiative last Fall, the APPA Board set the following three goals for the Task Force work:

- Evaluate current opportunities for APPA to become more welcoming, inclusive, and diverse
- Identify barriers that have hindered APPA's progress in this area
- Recommend strategies for APPA to increase its diversity and inclusion in such areas as programs, board composition, and volunteer opportunities

Members of the DEI Task Force included:

- Margaret Tennesen, University of Wisconsin-Madison, Chair of the Task Force, & APPA Board Vice-Chair
- Ada Baldwin, North Carolina State University
- Kim Case Nichols, University of Nevada, Las Vegas
- Andy Feick, Swarthmore College
- Michelle Frederick, American University
- Steve Gilsdorf, Wayne State University
- Lindsey Honeyager, University of Wisconsin-Madison
- Leslie Hutchins, University of Arkansas at Little Rock
- Tony Ichsan, Whitman College
- Dave Irvin, Florida State University & APPA Board Chair
- Jim Jackson, University of Nebraska-Lincoln & APPA Board Immediate Past President

- E. Lander Medlin, APPA President & CEO
- Pat Patton, University of Regina
- Benjamin Raphael, Florida A&M University
- Lindsay Wagner, The Knowledge Collaborative

Summary of Work Accomplished – Phase I

The Task Force held its first meeting on October 26, 2021, meeting once every three weeks throughout the remainder of the calendar year. Due to the COVID pandemic, these meetings were held in a virtual format.

The first task was focused on establishing and gaining consensus on a shared set of definitions for the terms of “diversity, equity, and inclusion.” The Task Force then conducted a SWOT analysis of the current state to inform possible steps for APPA to advance DEI. Sub-groups of the Task Force further clarified and finalized the DEI definitions; recommended associated short-term actions; and completed a public-facing DEI Statement of Commitment for APPA Board consideration and formal adoption. This work was informed by reviewing other organizations’ statements and identifying best practices.

In early 2022, the Task Force delivered its Phase I report to the APPA Board of Directors for their consideration. The report included a recommendation to adopt a formal DEI Statement of Commitment for APPA as well as DEI definition of terms. The complete Phase I report is included in this Final Report as Appendix A. The DEI Statement of Commitment and DEI definition of terms as reviewed and formally adopted by the Board in February 2022 are as follows:

APPA Statement of Commitment to Diversity, Equity, and Inclusion

“APPA is committed to the intentional and ongoing pursuit of a welcoming environment where diversity of thought and perspective is highly valued, free from barriers, and seeks to correct conditions of disadvantage. To fully represent the people and places of the educational communities we serve, APPA will empower its members through the provision of its resources and services in a fair and impartial manner. Our strength stems from the dedication, experiences, unique attributes, and talents of every member.”

DEI Definition of Terms

Diversity

Diversity at APPA includes valuing diversity of thought and perspective and connecting the unique attributes, backgrounds, and experiences that each individual brings to the organization.

APPA recognizes that its strength comes from the dedication, experience, talents and perspectives of every member.

To fulfill our mission, APPA must fully reflect and include individuals who represent the people and places of the educational communities that we serve.

We will create an environment where individuals are able to embrace their differences and leverage them to support educational excellence.

Equity

APPA expects the establishment of working conditions that are free from barriers and seeks to correct conditions of disadvantage.

APPA recognizes that each person has different circumstances and will strive to provide the exact resources and opportunities needed to reach an equal outcome.

APPA provides services and opportunities accessible in a fair and impartial manner. Equality means each individual or group of people is given the same resources or opportunities.

Inclusion

APPA is committed to an intentional and ongoing pursuit of a welcoming environment in which all individuals are treated fairly and respectfully, offered access to opportunities and resources, and empowered to contribute to the successful execution of the association's mission.

This Statement of Commitment and DEI definition of terms were shared with the Association membership through its various publications following the Board meeting and have also been posted on APPA's website.

Summary of Work Accomplished – Phase II & Final Recommendations

Following the Board's adoption of the Phase I Report, the Task Force next turned its attention to developing long-term goals and recommended actions for the Board and professional staff to make meaningful progress in support of this initiative. To expedite this work, the Task Force met in April 2022 for a two-day, in-person meeting in Alexandria, VA, engaging the facilitation support of Terri Dautcher, a Senior Consultant with the National Association of College and University Business Officers. Terri's extensive experience working with leadership teams on organizational change management; diversity, equity, and inclusion; and operational and structural changes, made her an invaluable resource to the Task Force during this intensive two-day session.

Over those two days, the recommendations of the Task Force developed into five strategic areas:

1. Volunteer Recruitment, Retention, and Leadership Activities
2. Professional Staff and Board
3. Policies, Procedures and Award Criteria
4. Member-facing Offerings and Brand Promise, Identity, and Messaging
5. Training, Assessment, and Continuous Improvement (universally applies to all strategies and associated actions)

For each strategic area, the Task Force identified specific actions and tasks that we believe will lead to meaningful gains in becoming a more diverse and equitable association while simultaneously ensuring sustained progress in creating an organizational climate that is inclusive and welcoming to all. Where possible, these actions also include target timeframes for implementation and potential person(s) responsible. These recommendations have been organized into a document, entitled Final Summary of Actions and Tasks, which is included in this report as Appendix B.

Recommended Foundational Actions for Prioritization

The Task Force recognizes that the list of actions and tasks is extensive and will take time to fully implement. As such, ten actions and corresponding tasks have been identified by the Task Force as recommended foundational elements for the Board and APPA staff to focus on initially as they undertake this work. Together, these ten actions cut across the five strategic areas and identify actions to be taken by the APPA Board and professional staff. While the Task Force is hopeful that all ten of these actions can move forward, we recognize that these recommended actions need to be vetted by APPA leadership and may in some cases need to be modified based on other operational priorities or constraints.

Improve diversity of APPA membership and volunteer pool

- Ensure all volunteers/members go through onboarding that clearly identifies APPA's DEI statement and stance.
- Review APPA value proposition to ensure alignment with diverse membership.
- Develop recruitment tactics that support diversity in recruiting new board members.

Assign responsibility for DEI work

- Recruit board member who is responsible for DEI, using the 'at large' board seat.
- Draft job description and hire full-time staff person who is responsible for DEI.

Require DEI training for all key stakeholders to ensure DEI is continually woven throughout APPA

- Require APPA board, staff, and trainers to participate in DEI trainings.
- Establish DEI guidelines for all trainings, speakers, volunteer leaders, faculty, and course curriculum; include regions and chapters in this work.
- Create DEI language guide and make available online to all.
- Develop response protocols for when APPA trainers or content providers behave in ways that are inconsistent with APPA's DEI values and practices.

Review all educational offerings through a DEI lens

- Add 'inclusion' assessment question to all educational session evaluations.
- Refine DEI component for CEFP credential.
- Track educational offerings for DEI alignment/content integration, number of sessions, etc.

Create guidelines and implement practices to ensure APPA events are accessible and inclusive

- Consider dietary needs of attendees (Halal, Kosher, Lent, Passover, Ramadan, etc.).
- Identify needs prior to events and gather feedback to improve future events.

Provide a safe space for reporting incidents at APPA events

- Establish criteria for what defines a 'safe space' at APPA events and communicate expectations consistently to ensure accountability.
- Develop a sexual harassment policy; implement a reporting and tracking process.
- Make all 'safe space' policies and reporting processes visible on the APPA website.

Build new engagement opportunities for members

- Design, and expand structured networking activities (virtual and in person).

- Expand mentoring opportunities to include more FM disciplines and people.
- Offer “bite size” volunteer opportunities for people who have lots of demands on their time, i.e., people with young families, single parents, those new to the field, etc.

Establish baseline expectations for DEI work and responsibility across all APPA staff

- Develop targeted recruitment approaches to support diversity of new staff hires.
- Ensure that all position descriptions reflect responsibility for DEI.

Review and revise APPA accounting and business practices to align with DEI values and practices

- Review existing policies and procedures for DEI elements.
- Assess policies and procedures for accessibility; update as needed to ensure accessibility.

Ensure employee handbook is reflective of APPA DEI principles and values

- Review staff handbook to identify gaps and modify as needed, ensuring legal and compliance factors are considered as updates are made; consider international handbook, too.

Key Themes & 2030 Future State Vision

A number of themes emerged from the Task Force’s work that bears mentioning and further reinforcement. DEI intersects with everything and as such is a shared responsibility for and by all stakeholders. That said, we must build systems to assess, reset, and re-check outcomes to ensure DEI is “baked in” to everything we do. Consistency, continuity, and accountability will be critical to these efforts, thus requiring training to level up expectations and understandings, ensure accountability, and maintain a focus on resultant impacts. This work will not be accomplished overnight and there is complexity around implementation that must be acknowledged. Some actions can be done quickly, others will need to be staged and will take more time to fully realize. Make no mistake, language, images, and feedback loops all matter. APPA must remain committed to this work and recognize the importance of committing to both a successful launch and long-term journey.

The work of the APPA DEI Task Force sends an important signal to our membership that APPA leadership recognizes the importance of intentionally integrating DEI into all aspects of the association. Indeed, this initiative is fundamental to APPA’s continued success as the professional association of choice for educational facilities professionals. While taking on this work is a deliberate choice, it should be noted that failure to act poses an existential threat to the association. New generations of facilities management professionals are seeking to get involved with organizations that are committed to justice and the inclusion of all voices in a manner that places a high value on diverse thought and perspective. If they do not find this in APPA, they will look to get involved elsewhere.

The recommendations of this Task Force, and in particular, the five strategies and corresponding actions provide a roadmap for undertaking this important work. This report provides specific and concrete tasks for APPA board members, staff, trainers, and volunteers to do to create a greater sense of belonging and level of inclusivity within the association. It cannot be said strongly enough that this work must be a shared responsibility that everyone is willing to undertake with enthusiasm and a sense of urgency. Those of us who currently or previously have held leadership

positions of power and privilege within APPA have a particular responsibility to make this work our priority, taking the time to reflect on our unconscious biases and exclusionary past practices, whether intentional or unintentional, and commit to changing our behavior to be more inclusive and welcoming. It is only through this self-reflection and a willingness on our part to embrace this work that APPA will fully achieve its desired future state.

The members of the Task Force envision a future state for APPA in which the association remains a strong and vital organization with a diverse membership that is strengthened by the active engagement of members who reflect the diversity of the educational institutions and facilities organizations we serve. Moreover, we envision a future in which APPA is recognized for having played a significant leadership role in moving the educational facilities management profession to a more 'front and center' position of respect in the education sector. And finally, we envision an association that is centered on creating and maintaining a sense of belonging where everyone feels they can see themselves in APPA.

APPA has already demonstrated the ability to adapt and thrive in the face of a world-wide pandemic and we have no doubt that APPA will be successful in its DEI journey as well. While the work may be hard at times and is not without risk, it is also directly aligned with the caring for people and sharing among educational facilities management professionals that has been at the core of APPA's strength over its long history. Indeed, APPA is founded on principles that reflect a deep respect for the value of the work and contributions of all educational facilities management professionals. As such, it is not difficult to imagine a future in which DEI is simply part and parcel of what APPA is known.

Conclusion & Call to Action

This work represents an intentional balance between aspirational thoughts and specific actions that will drive practical implementation and execution over time. Yet this work is intended to initiate a cultural shift within APPA. As such, it is an invitation to APPA members to assist in transforming the association and the educational facilities management industry sector. Without a commitment from our membership, we will not succeed. Therefore, we are asking everyone to make the following commitments to:

- become radically self-aware;
- look to the past and critically examine the industry and your actions within it;
- reflect using a DEI lens;
- look backwards, forwards and within, through our definitions of diversity, equity, and inclusion;
- notice and acknowledge points of discord; and,
- make this a topic of conversation.

As we become more open to and interested in the differences in the ways each of us experiences the world, we will all become more aware of the barriers that are preventing equity and inclusion for some within APPA and educational facilities management. As our awareness and willingness to be open and vulnerable increases, we can work together to bring down the barriers.

The launch of this work is considered a long-term journey and will permeate everything we do and part of every conversation. To achieve success, we must all become more open and vulnerable, and do so with humility. Together we can enhance that sense of belonging and welcoming that is so critical to creating a true culture of inclusion.

Appendix Items

Appendix A: Task Force Phase I Report to the APPA Board of Directors dated February 5, 2022

Appendix B: Final Summary of Actions and Tasks

APPA Diversity, Equity & Inclusion Task Force

Phase I Report to the APPA Board of Directors February 5, 2022

Background and Charge

As APPA continues to *prepare for every future*, the Board recognizes that it is time for APPA to formalize our past and current practice around equity and inclusiveness for the association. With the formation of a Task Force to focus on diversity, equity, and inclusion (DEI), APPA demonstrates a sustained and comprehensive commitment to establish an organizational climate that is just and inclusive – regardless of individual differences, beliefs, or identities.

APPA's strategic plan recognizes the criticality of lifelong learning by and for our members. As such, our understanding of and response to DEI will further evolve as we address the needs of this membership community. This work belongs to every member of our community, with APPA as a key collaborator in integrating equity, inclusion, and diversity into all aspects of the APPA mission.

With this commitment, the 2021-2022 APPA Board of Directors has identified one of its high priority initiatives that will be focused on advancing diversity, equity, and inclusion principles and practices within APPA. In September 2021, APPA's Executive Committee formed a DEI Task Force comprised of the following individuals:

- Margaret Tennesen, University of Wisconsin-Madison, Chair of the Task Force, & APPA Board Vice-Chair
- Ada Baldwin, North Carolina State University
- Kim Case Nichols, University of Nevada, Las Vegas
- Andy Feick, Swarthmore College
- Michelle Frederick, American University
- Steve Gilsdorf, Wayne State University
- Lindsey Honeyager, University of Wisconsin-Madison
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- Tony Ichsan, Whitman College
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- Pat Patton, University of Regina
- Benjamin Raphael, Florida A&M University
- Lindsay Wagner, The Knowledge Collaborative

The APPA Board set the following preliminary goals for the Task Force: 1) evaluating current opportunities for APPA to become more welcoming, inclusive, and diverse; 2) identifying barriers that have hindered APPA's progress in this area; and 3) recommending strategies for APPA to increase its diversity and inclusion in such areas as programs, board composition, and volunteer opportunities. At the same time, the Task Force was asked to determine the full scope and focus of the DEI initiative.

Over the past five months, the Task Force has made meaningful progress on its preliminary goals and is pleased to present this Phase I Report to the APPA Board for review and consideration at its February 11–12, 2022, strategy meeting. This report includes a summary of the work completed to date; a DEI Statement of Commitment; definitions of the DEI terms; and, recommended short-term actions for the APPA Board and professional staff to make initial progress.

For clarity, the work of the D.E.I. Task Force is in no way complete. To date, the group has focused on short-term strategies and actions. This coming April, the Task Force will hold a two-day, in-person meeting to develop recommendations for mid and long-term strategies as well as possible metrics to measure progress in support of this initiative.

The Task Force would like to express its appreciation to APPA leadership for making this long-term commitment to shift its culture. The Task Force formation and work sends an important signal to our membership that APPA recognizes the importance of integrating DEI into all aspects of the association. This initiative is fundamental to APPA's continued success as the professional association of choice for educational facilities professionals.

Overview of Work Accomplished

The Task Force held its first meeting on October 26, 2021, meeting once every three weeks throughout the remainder of the calendar year. Due to the COVID pandemic, all meetings were held in a virtual format.

The first task was focused on establishing and gaining consensus on a shared set of definitions for the terms of "diversity, equity, and inclusion." The Task Force then conducted a SWOT analysis of the current state to inform possible steps for APPA to advance DEI. Sub-groups of the Task Force further clarified and finalized the DEI definitions; recommended associated short-term actions; and completed a public-facing DEI Statement of Commitment for APPA Board consideration and formal adoption. This work was informed by reviewing other organizations' statements and identifying best practices.

Proposed APPA Statement of Commitment to Diversity, Equity, and Inclusion

“APPA is committed to the intentional and ongoing pursuit of a welcoming environment where diversity of thought and perspective is highly valued, free from barriers, and seeks to correct conditions of disadvantage. To fully represent the people and places of the educational communities we serve, APPA will empower its members through the provision of its resources and services in a fair and impartial manner. Our strength stems from the dedication, experiences, unique attributes, and talents of every member.”

Proposed DEI Definition of Terms

Diversity –

Diversity at APPA includes valuing diversity of thought and perspective and connecting the unique attributes, backgrounds, and experiences that each individual brings to the organization.

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To fulfill our mission, APPA must fully reflect and include individuals who represent the people and places of the educational communities that we serve.

We will create an environment where individuals are able to embrace their differences and leverage them to support educational excellence.

Equity -

APPA expects the establishment of working conditions that are free from barriers and seeks to correct conditions of disadvantage.

APPA recognizes that each person has different circumstances and will strive to provide the exact resources and opportunities needed to reach an equal outcome.

APPA provides services and opportunities accessible in a fair and impartial manner. Equality means each individual or group of people is given the same resources or opportunities.

Inclusion –

APPA is committed to an intentional and ongoing pursuit of a welcoming environment in which all individuals are treated fairly and respectfully, offered access to opportunities and resources, and empowered to contribute to the successful execution of the association’s mission.

Recommended Short-term Actions for APPA to Advance DEI

The Task Force strongly encourages the APPA Board and staff to implement these short-term actions to demonstrate more immediate commitment to this important initiative. These actions will lead to meaningful progress for the association.

Diversity

- Place APPA's Board-approved Statement of Commitment to DEI on its website.
- Purposefully recognize the importance of diversity in selecting and assembling volunteer leadership, standing activity teams, stakeholder groups, councils, and project task forces.
- Consider the diversity of APPA's professional staff and the APPA Board.
- Examine all APPA policies, procedures, and statements to ensure diversity barriers are removed (e.g., governance, awards and honors, hiring and retention, business practices, publications, professional images, etc.).
- Communicate to all members on a quarterly basis the importance of the diversity culture.
- Use surveys to measure APPA's efforts in addressing diversity and create reports to discuss the findings to close the gaps that hinder diversity.
- Find opportunities and incentives for recruitment, development, and retention.

Equity

- Continue to embrace virtual deliveries and methods to allow broad-based engagement, contribution, and participation on the Board, teams, groups, etc. and other operational tasks.
- Review and assess communications and materials to ensure inclusive language and images and the elimination of gender and ethnic bias.
- Create affinity groups and/or special interest groups to broaden participation opportunities.
- Where possible and feasible (financially or otherwise), offer translation and closed captions for APPA webinars and virtual programs.

Inclusion

- Develop content and implement an onboarding plan or "train-the-trainers" session for those who are providing educational sessions and/or facilitating training and professional development programs.
- Develop and teach a common language, including definitions and real-life examples, to enhance cultural competency and assist individuals in getting more comfortable with what might be presently uncomfortable.
- Initiate a cultural shift by increasing vulnerability. For example, build a community of shared interest and commitment to growth and understanding with respect to DEI. And pull people in as opposed to calling them out to educate when a misstep has been made.

- The APPA Board and volunteer leaders/ members that serve APPA will be required to make a commitment to DEI and thereby reflect diversity and inclusion in their words and actions.
- Work to achieve a welcoming state where individuals feel they can see themselves in APPA.

Proposed Call to Action to the APPA Board, Staff, and Membership

The work defined in the sections above is the first stage of a long-term commitment by the association to diversity, equity, and inclusion. This work is intended to initiate a cultural shift within APPA. It is an invitation to APPA members. Together we can transform the association and the facilities management industry.

The Task Force invites the Board, staff, and all APPA members to participate in the short, mid, and long-term strategies and actions that will provide the framework for increasing the level of diversity within the association and ensuring equity and inclusion for all. Without a commitment from you and our membership, we will not succeed.

We are not asking you to volunteer to work on a specific task that has a clear start and end point. We are asking everyone to make a commitment to become radically self-aware. We are asking that you, in your role as a member of the Board, staff, or association, look to the past and critically examine the industry and your actions within it. Reflect using a DEI lens. Look backwards, forward and within, through the definitions of diversity, equity, and inclusion. Notice and acknowledge points of discord. We ask that you make these points of discord topics of conversation.

As we become more open to and interested in the differences in the ways each of us experiences the world, we will all become more aware of the barriers that are preventing equity and inclusion for some within APPA and the facilities management industry. As our awareness and willingness to be open and vulnerable increases, we can work together to bring the barriers down.

This work does not stand alone as a separate program or set of initiatives. This work permeates all we do as an association and as an industry. DEI should be a part of every conversation. We invite you to make this commitment as part of the APPA organization. Reflect on the past and envision the future through a DEI lens. Turn discord into dialogue. Be open, vulnerable, and have humility. Together we can indeed create a culture of inclusion.

APPENDIX B

Final Summary of Actions & Tasks

Notes: Final column determines Board or Staff as the potentially responsible party. In some instances that was left blank, so when transcribed, it is also blank. In a few instances, when 'Board' was indicated in small writing, either 'task force' or 'standing council once created' was indicated.

Where no timeline or responsible party was written on the sheets, it was left blank on the transcription.

Focus Area 1 of 4: Volunteer recruitment, retention & leadership activities

	22-23	23-24	24-25	B/S
Action: Improve diversity of volunteer pool				
<ul style="list-style-type: none"> Create a volunteer portal where people can create a profile 		X		S
<ul style="list-style-type: none"> Develop a calendar of religious & cultural observances to be more aware of how offerings align with and potentially impact members' observances 	X			S
Action: Improve diversity of membership				
<ul style="list-style-type: none"> Ensure all volunteers / members go through an onboarding that clearly educates about APPA DEI statement and stance 		X		B S
<ul style="list-style-type: none"> Provide 'free sample' access to some APPA offerings 	X			B S
<ul style="list-style-type: none"> Establish affinity groups (HBCU, Military, etc.) 	X			B S
<ul style="list-style-type: none"> Promote affinity groups in FM Magazine 	X			S
<ul style="list-style-type: none"> Conduct a thorough review of membership structure with specific attention to presence of membership barriers (ex. Must be full-time college student to be eligible for student membership) 		X		B S
<ul style="list-style-type: none"> Review APPA value proposition to ensure alignment with diverse membership 	X			B
Action: Increase collaboration between APPA and other organizations to include international, regions and chapters, and with other associations and profiles of institutions and organizations				
<ul style="list-style-type: none"> Develop a list of potential partners 	X			B S
<ul style="list-style-type: none"> Evaluate current and past partner relationships 	X			B S
<ul style="list-style-type: none"> Prioritize collaboration and networking activities 	X			B S

Focus Area 2 of 4: Professional staff and board

	22-23	23-24	24-25	B/S
Action: Assign responsibility for DEI work				
<ul style="list-style-type: none"> Recruit board member who is responsible for DEI, using the 'at large' seat on the board 	X			B
<ul style="list-style-type: none"> Draft job description and hire full-time staff person who is responsible for DEI 			X	B S
Action: Establish baseline expectations for DEI work and responsibility across all roles / job descriptions of staff at APPA				
<ul style="list-style-type: none"> Offer professional development for board and staff, integrating DEI into all training and onboarding for board and staff 	X			B S
<ul style="list-style-type: none"> As staff and board positions are open, develop targeted recruitment approach to support diversity of hire(s) 		X		B
<ul style="list-style-type: none"> Ensure that all position descriptions reflect responsibility for DEI 		X		S
<ul style="list-style-type: none"> Develop annual 360-degree review to ensure consistent attention and success related to diversity, equity, and inclusion practices 		X		B S
Action: Review APPA's governance structure to eliminate any barriers to inclusion				
<ul style="list-style-type: none"> Conduct a closer review of the recent restructuring to ensure attention and consideration of DEI factors across the governance structure and processes <ul style="list-style-type: none"> Language – is wording reflecting and encouraging DEI? Board make-up / composition Identify and eliminate barriers to diverse participation 		X		B
		X		B
		X		B
Action: Undertake succession planning for the staff and board				
<ul style="list-style-type: none"> Identify who owns what / has responsibility for what / and who is back-up 	X			B S
<ul style="list-style-type: none"> Identify gaps in DEI representation 	X			B S

Focus Area 3 of 4: Policies and procedures

- Ensure human resource, business, accounting, procurement, and policies reflect APPA’s DEI principles and values
- Ensure that APPA’s Awards & Recognitions not only reflect, but emphasize APPA’s DEI principles and values

	22-23	23-24	24-25	B/S
Action: Create procurement template for member institutions				
• Design a template that reflects DEI commitment and values so that vendors understand what is expected	X			S
• Post template on website	X			S
Action: Review and revise APPA accounting and business office practices to ensure alignment with DEI values and practices				
• Review existing policies and procedures for DEI elements, and to address barriers	X			S
• Assess elements of policies and procedure for accessibility – can diverse profiles of people access our resource, forms, etc.? Make any corrections necessary to ensure accessibility of our policies and procedures.	X			S
Action: Create a procurement template / guidelines for APPA				
• Create a checklist to keep focus on / address the need to work with underrepresented groups	X			S
o Women				
o Minorities				
o Ethnic profiles				
o Other				
• Require RFP respondents to provide evidence of DEI alignment	X			S
Action: Ensure employee handbook is reflective of APPA DEI principles and values				
• Review existing handbook to identify gaps	X			S
• Consider International Handbook too	X			S
• Modify handbook to address gaps	X			S
• Ensure legal and compliance factors are considered as updates are made	X			S
Action: Use handbook to help / support onboarding of new staff				
• Emphasize DEI training, terms and definitions	X			S
• Share two-way expectations; ask and listen	X			S
• Hold staff accountable for upholding APPA DEI principles and values	X			S
Action: Increase transparency in award process / selection				
• Communicate / document process clearly on how recipients are selected	X			B S
• Ensure a feedback loop is in place for any non-recipients		X		B S
Action: Ensure a fair and equitable selection process for all awards; address multi-year award nominations				

<ul style="list-style-type: none"> • Build and apply a DEI checklist / criterion for all awards, and award processes 	X	X		B S
<ul style="list-style-type: none"> • For all awards, track demographics of nominees and recipients 	X			B S
<ul style="list-style-type: none"> • Create and implement an outreach program to broaden and diversify pool of nominees for awards 	X	X		B S
Action: Review awards language for DEI terminology and inclusivity				
<ul style="list-style-type: none"> • Update all award materials, nomination forms, etc. 	X			B S
<ul style="list-style-type: none"> • Establish regular review schedule and audit for quality control and consistency 	X			B S
Action: Establish a DEI award				
<ul style="list-style-type: none"> • Follow framework for establishing new awards 				
<ul style="list-style-type: none"> • Create structure to assess and identify criteria for an individual DEI award 				
<ul style="list-style-type: none"> • Create structure to assess and identify criteria for an institutional DEI award 				

Focus Area 4 of 4: Member-facing offerings

- Generate DEI Resources for the FM field / membership
- Cultivate and sustain an inclusive, safe, responsive environment at APPA events and offerings

22-23	23-24	24-25	B/S
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Action: Add DEI Resources to the Book of Knowledge (BOK)				
• Identify needs and develop content		X		S
• Provide updated DEI content through the website		X		S
• Develop and provide via the web a list of DEI speakers & educational programming content / programs		X		S
• Develop and implement a process to ensure the BOK and other member-facing DEI resources stays updated		X	X	S
Action: Create guidelines and implement practices to ensure APPA events are more accessible and inclusive				
• Consider dietary needs of attendees (halal, kosher, Lent guidelines, Passover, Ramadan, etc.)	X			S
• Develop input / evaluation / feedback look to identify needs prior to an event, and get feedback for improvements to future events				
Action: Provide a safe space for reporting incidents at APPA events				
• Develop criteria to establish expectations of what defines a safe space at APPA events	X			S
• Develop a guide to communicate and ensure accountability	X			S
• Develop a Sexual Harassment Policy (or if one exists, revisit and revise if needed)	X			S
• Develop and implement a reporting and tracking process for incidents	X			S
• Make all 'safe space' policies and reporting processes visible on the APPA website	X			S
Action: Build new and different engagement opportunities for members				
• Research, design, and expand structured networking activities (virtual and in person)				
• Expand mentoring opportunities to include more disciplines and people across FM				
• Develop and offer more "bite size" volunteer opportunities; ways for people to engage and contribute with a time commitment that works for people who have a lot of other demands on their time (young families, single parents, new to the field, etc.)				

UNIVERSAL – ASSESSMENT & TRAINING (OVERLAYS ALL ACTIONS)

	22-23	23-24	24-25	B/S
UNIVERSAL – Work that applies to all Focus Areas				
Action: Establish DEI standing council or committee				
<ul style="list-style-type: none"> Develop definitions and a lexicon for APPA re. diversity, equity, and inclusions, and other related terminology 	X			B
Action: Establish a baseline tool (climate survey) to understand existing environment and current diversity & DEI work				
<ul style="list-style-type: none"> Structure appropriate assessment tool (USC / NACCC Survey) 	X			B S
<ul style="list-style-type: none"> Implement project timeline; data gathering, report & analysis 	X			B S
<ul style="list-style-type: none"> Survey membership to gather baseline data and identify gaps in DEI work 		X		B S
<ul style="list-style-type: none"> Using the ethnographic survey of membership that’s going out, consider how else we might be able to leverage that for DEI work / support 		X		B S
<ul style="list-style-type: none"> APPA Leadership survey (leaders get surveyed) about DEI progress and compare it with external evaluations and post-program feedback to identify gaps 		X		B S
<ul style="list-style-type: none"> Implement recommendations that emerge from surveys and analysis 		X		B S
<ul style="list-style-type: none"> Repeat on a consistent basis to track changes against baseline 			X	B S
<ul style="list-style-type: none"> Adopt a process that supports continuous improvement re. DEI 			X	B S
Action: Using baseline survey data, establish benchmarks for current and future diversity of APPA				
<ul style="list-style-type: none"> Include tracking of demographics, data analysis, in the survey, and subsequent reporting 		X	X	B S
Action: Establish DEI data points / KPIs to track region/national/international DEI progress				
<ul style="list-style-type: none"> Establish methodology for measuring success re. DEI across all aspects of programming, policies, and procedures 				
<ul style="list-style-type: none"> Start tracking demographics, and work to match leadership to organizations 				
<ul style="list-style-type: none"> If not measuring up, then manage to the gaps and make continuous improvements 				
Action: Develop a decision matrix or checklist to be used to ensure APPA services are free of barriers and inclusive				
<ul style="list-style-type: none"> Identify barriers 				
<ul style="list-style-type: none"> Develop tool – matrix or checklist to audit and identify issues across APPA points of contact with stakeholders 				
<ul style="list-style-type: none"> Establish and follow protocols to apply the tool to APPA activities 				
Action: Review all educational offerings through a DEI lens / DEI question				
<ul style="list-style-type: none"> Add ‘inclusion’ assessment question to the ed of all ed session evals 				
<ul style="list-style-type: none"> Refine DEI component for CEFP credential 				
<ul style="list-style-type: none"> Track educational offerings for DEI alignment / number of sessions, how DEI content is integrated, etc. 				

Action: Require training for all key stakeholders, including board members, staff, and trainers, to ensure DEI is continually woven throughout APPA				
<ul style="list-style-type: none"> Take different communication styles into consideration when planning meetings (introvert, extrovert) (board, members, non-members) 	X			B S
<ul style="list-style-type: none"> Identify and offer suitable training that aid in DEI competency-building 		X		B S
<ul style="list-style-type: none"> Require board and staff participation in DEI trainings 		X		B S
<ul style="list-style-type: none"> Establish DEI guidelines for all trainings, speakers, volunteer leaders, faculty & curriculum <ul style="list-style-type: none"> Include regions and chapters in this work 	X			B S
<ul style="list-style-type: none"> Create DEI language guide and make available online to all 	X	X		B S
<ul style="list-style-type: none"> Develop guidelines for when APPA trainers or content providers behave in ways that are inconsistent with our DEI values and practices 	X	X		B S
Action: Ensure content of APPA (image, language, etc.) is reflective of APPA’s DEI principles and values				
<ul style="list-style-type: none"> Audit & make necessary changes to content to ensure it is accessible to all staff, faculty, leadership, volunteers, etc. 				
<ul style="list-style-type: none"> Review website for translation into multiple languages and for people with hearing or visual impairments 				
<ul style="list-style-type: none"> Develop guidelines and processes to ensure Closed Caption feature is used on Zoom or any video chat or digital content produced 				
<ul style="list-style-type: none"> Develop guidelines and processes to ensure all content is in all formats is DEI aligned before it is presented and published 				
<ul style="list-style-type: none"> Develop guidelines and processes to ensure all images of people, FM disciplines, or activities present equitable representation of diverse people and APPA activities 				
<ul style="list-style-type: none"> Develop guidelines and processes to ensure all PowerPoint presentations are accessible to people with visual or hearing impairments 				
<ul style="list-style-type: none"> Provide American Sign Language translation to live presentations or pre-recorded video webinars 				
<ul style="list-style-type: none"> Create and made available online, a template / guide for chapters to follow to support DEI alignment at the chapter level 				