

APPA September 2025 Operational Updates

HEADLINES:

- Implemented new website and new member database (NoviAMS) on September 15th!
- End of September marks halfway through FY26

MEMBERSHIP

Net Membership Changes in Month

- +3 Institutional Members
- +1 Business Partners
- **+4 Total Members**

Total Membership (end of month)

- Total Institutional Members = **981** (2.4% Year-over-Year Growth)
- Total Business Partners = **147** (77.1% Year-over-Year Growth)
- Total Members = **1,128** (8.4% Year-over-Year Growth)

Membership Notes

- Deactivated some members during the Novi transition who had not paid outstanding invoices—reducing total membership counts by 14. However, we were still able to net 4 new members in the month! (actually represents 18 new memberships in the month)
- Novi provides dramatically improved visibility into the status of dues invoices. We have established a new procedure to cancel membership invoices not paid 60 days after due date.
- Transitioning to monthly dues payouts with APPA regions (historically quarterly). The combination of implementing Novi and improving financial processes will allow us to pay out regional dues quicker ongoing.

FINANCIAL UPDATE

YTD Versus Month-by-Month Budget

- Income is below budget by 7.9% YTD.
 - Primary drivers:
 - Evaluation invoice (APPA Advisors/FMEP) was lower than forecasted
 - Lower than forecasted Education Income (softer June APPAU attendance and fewer on-campus trainings YTD)
- Expenses are below budget by 8.9% YTD.
 - Primary drivers:
 - Travel savings (in conjunction with fewer Evaluations and on-site trainings)
 - Reduced contractor spending
 - Lower publication costs

- Working on:
 - o Pipeline for Evaluations has been building – several contracts recently signed or imminent
 - o Pipeline for APPA On Campus has improved for fall months. Also reevaluated costs of APPA On Campus program maintenance and delivery—revised some pricing to ensure program sustainability.
 - o Preparing advertising opportunities pricing and collateral as APPA takes over advertising responsibilities from previous contractor.
 - o Working to reduce and manage February APPAU costs to prevent event loss.
- Other financial notes:
 - o The transition to Novi has completely revolutionized our invoicing processes and transparency of membership invoices. Novi is fully integrated with QuickBooks online—open invoices are now accurately reflected in accounts payable reporting.
 - o New Novi invoicing process enables staff to more easily assist members in invoicing tasks.
 - o Simplified payment processes via Novi have already resulted in faster payment turnarounds.
 - o The impact of the Novi transition is truly revolutionary for the team—especially related to invoicing and financial processes.

MONTH HIGHLIGHTS

- NoviAMS/Website Launch on September 15
 - o Culmination of months of preparation and data cleanup by APPA staff
 - o Completely redesigned website – look & feel as well as content
 - o Provided a webinar and pre-transition communications to members
 - o System setup completed with a minimal implementation budget with NoviAMS (\$13k) – APPA staff handled the majority of setup tasks
 - o Novi directly integrates into QuickBooks Online (significant reduction in daily manual financial processes while improving reporting/transparency)
 - o Essential website content available at launch – additional content will continue to be added as necessary
 - o Enables easier/more accurate membership reporting – including the ability to share live reporting data with volunteers
 - o Integrated mailing list management
 - o Additional self-service options available to members
 - Implemented regional and chapter reports for volunteer leaders
 - o More accurate website usage statistics
 - o Comprehensive event calendar
 - o Mobile-friendly website
 - o New committee functionality to bring visibility to volunteer leadership
 - o Overwhelmingly positive feedback received from members
 - o This represents APPA’s most significant technology improvement in 10 years—a major milestone for both the team and the association overall.

- Implemented streamlined CEFP registration and recertification processes
 - o Also sunset regional pre-purchased CEFP coupons
- Purchased and began implementation of new digital marketing/advertising software package (Feathr)
 - o Initial website setup completed
 - o Full implementation project to commence in November
- Signed contract for September 2026 APPAU venue (St. Louis)
- Additional support to Business Partner Advisory Committee (BPAC) discussions and requests. Planning to meet with BPAC in October to review sponsorship pricing for 2026.
- Regional Conference Participation
 - o APPA Staff and Executive Committee participated in following regional conferences:
 - RMA (Bozeman, MT)
 - CAPPa (Norman, OK)
 - MAPPA (Milwaukee, WI)
 - ERAPPa (Atlantic City, NJ)
 - o Participated in board meetings
 - o Presented “All About APPA” sessions
 - o Additional speaking engagements
 - o Networking and connecting with volunteer leaders, institutional members, and business partners
- International Strategic Partner Activity
 - o Lalit and Gabe attended TEFMA conference in Brisbane, Australia
 - o Presented on APPA offerings and current membership topics
 - o Knowledge and best practice sharing
 - o Learned about Australia/New Zealand benchmarking processes and reporting
 - o Additional engagement and follow-up to follow
- Tickets on sale for February APPAU and APPA Annual Conference (July)
- Implementation of new HR/Payroll system (Gusto) – October 1 launch

PLANNED FOR NEXT MONTH

- Facilities Manager Magazine – fall edition
- Attend SRAPPa and PCAPPa regional conferences
- Attend HEFMA conference (international partner)
- Finalize updated advertising rates for InsideAPPa and Facilities Manager Magazine
- Finalize list of technical and event services APPA plans to provide to regions/chapters
- Implementation of Learning Management System (LMS) – scheduled for November launch
- Launch of new HR/Payroll system (Gusto)