## Objectives

The Committees for the IFMA SD Chapter establish, implement and report status on the Strategic Objectives for the current Chapter year. These objectives connect to and support the Chapter vision, mission and unique value proposition.

### Balanced Score Card

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<th>Committee</th>
<th>Strategic Objectives</th>
<th>Measures</th>
<th>Targets</th>
<th>Accountability</th>
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</table>
| Associates | 1. Keep Industry Partners engaged, participating, and satisfied with their membership. | 1. Coordinate quarterly communication opportunities (events, surveys, etc) to solicit satisfaction information from membership.  
2. Communicate information in regards to associate members to appropriate committees (i.e. membership, sponsorship). | 1. Consistent quarterly communication.  
2. Create awareness of IFMA SD through networking and social events.  
3. Increase sponsorship opportunities within communication. | **Champions:**  
- Stephanie Kozlowski  
- Jessica Kalloch  

**Accountability:**  
- Executive Board | 1. Event coordination and communication.  
2. Increase committee participation, awareness and sponsorship towards IFMA events.  
3. Help plan the annual trade shows.  
4. Plan two A.M. power lunches to help Associates learn how to navigate selling in IFMA. |
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| Communications | 1. Provide a platform to encourage communication and the sharing of resources to our members and the FM community.                                                                                                                                                       | 1. Increase number of visits to our website and keep website updated on a weekly basis.                                                                                                                                                                      | 1. By July 2018, increase website sessions to 1,000 per month.  
2. By November 2017, determine if 1,000 Website sessions per month is a good baseline.                                                                                                                                 | Champions:  
• David Suter  
• Donna Frick  
• Steve Milinkevich  
Accountability:  
• Communications Committee  
• Executive Board                                                                                                                                                                               | 1. Continue use of social media to promote FM related stories and events.  
2. Host annual luncheon or event (e.g. workshop before luncheon). Spotlight website and online resources.  
3. Partner with other winning chapters and provide webinars on Best Practices in Chapter Communications.  
4. Integrate the use of Constant Contact as part of this committee.  
5. Submit original content to the West Coast Regional Insider.  
6. Submission location on website for Job Bank, RFP submissions, etc. – have a queue for review.  
7. Enlist more volunteers to write stories and post topics.  
8. Use Flickr as a platform for photos.  
9. Publish monthly spotlight articles.                                                                                                                                                     |
|             | 2. Foster a sense of community among chapter members.                                                                                                                                                                 | 2. Chapter website would be the hub for all chapter communications and create a member forum on the website.                                                                                                                                               | 2. By July 2018, have a paid Web Administrator.                                                                                                                                                      |                                                                                                   | 1. Begin consistent communication with all committees.  
2. Use technology based platforms (like Swivel) to record and showcase our monthly luncheons on-line.                                                                                                      |
<p>|             | 3. Be a leader in Communications among IFMA chapters.                                                                                                                                                               | 3. Connect with other chapters and offer to help them build up their communications.                                                                                                                                                                     | 3. Participate in quarterly International West Coast Town Hall meetings.                                                                                                                                  |                                                                                                   |                                                                                                                                            |
|             | 4. Create new and exciting ways to promote IFMA through social media outlets.                                                                                                                                         | 4. Increase Linked-In exposure by personal contacts. The Communications team will be taking responsibility in posting.                                                                                                                                      | 4. By July 2018 create a baseline for number of social media followers for San Diego Chapter.                                                                                                            |                                                                                                   |                                                                                                                                            |
|             |                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                        |                                                                                                                                                                                                    |                                                                                                   |                                                                                                                                            |</p>
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<td>Community Service</td>
<td>1. Increase awareness of IFMA SD in the community through volunteer work and monetary donations.</td>
<td>1. Coordinate a minimum of (2) volunteer work projects.</td>
<td>1. Organize community service work parties during the spring, summer, fall – promote to all members.</td>
<td>Champions: Vicky Cate, Rachel Willis</td>
<td>1. Create ongoing support through donation and volunteer time at various shelter locations.</td>
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<td>2. Provide opportunities for IFMA members to give back to the community.</td>
<td>2. Coordinate new and ongoing outreach opportunities.</td>
<td>2. Increase visibility of IFMA donation activities on the various charity websites IFMA donates to.</td>
<td>Accountability: • Core Committee: Vicky Cate, Sheryl Chaffee, Juli Harris, Rachel Willis, Michael Siddall, Heather Collins, Theresa Rojas</td>
<td>2. Christmas decorating at various children's and emergency shelters.</td>
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<td>3. Increase direct opportunities for members to underwrite various community outreach programs by 15%.</td>
<td>3. Create template for ongoing fundraising activities by IFMA community service committee.</td>
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<td>3. Hold a canned food/clothing Drive.</td>
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<td>4. Raise monetary and in kind donations by 5% in 2017. Increase by 5% annually.</td>
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<td>4. Orchestrating opportunities to underwrite volunteering efforts at Christmas Luncheon and IFMA's annual golf tournament.</td>
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<td>5. Quantify in kind donations for 2017.</td>
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<td>5. Keep IFMA members updated on the progress of the charity contributions.</td>
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<td>Champions: Vicky Cate, Sheryl Chaffee, Juli Harris, Rachel Willis, Michael Siddall, Heather Collins, Theresa Rojas</td>
<td>6. Hold a Dress for Success drive to collect gently-used clothes in support of youth entering the workforce. “Spring Cleaning” and “Back to School” months. Collect rain ponchos for storm season.</td>
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<td>Initiatives: • Core Committee: Vicky Cate, Sheryl Chaffee, Juli Harris, Rachel Willis, Michael Siddall, Heather Collins, Theresa Rojas</td>
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| Education & Professional Development | 1. Provide and engage stakeholders with opportunities to expand and leverage their collective knowledge and experience. Introduce membership to shifting and growing trends in facilities maintenance. | 1. Develop an education program that supports the 11 IFMA competencies. | 1. Strive to cover each competency over every 18 month calendar. Add at least 7 new CFM's, FMP's and SFP's to our membership each year. | **Champions:**  
  - Lisa Chappell  
  - Denise Colestock  
  **Accountability:**  
  - E&P Committee  
  - Executive Board | 1. Present informative programs that focus on the latest developments and new technologies for the profession.  
  2. Provide and manage the CFM, FMP, Essentials of FM, and SFP programs for Chapter Members. Offer one or more CFM, FMP, Essentials of FM, and SFP educational opportunity per year.  
  3. Cultivate future FM's through offering at least one event targeted toward our chapter membership each year.  
  4. Provide at least one scholarship per year for one class in the credential program.  
  5. Team with Communications Committee in providing up to date content for E&PD web subpage. |
| | 2. Provide and manage the CFM, FMP, Essentials of FM, and SFP programs for Chapter Members. | 2. Appoint a leader to coordinate and promote programs. Offer one or more CFM, FMP, Essentials of FM, and SFP educational opportunity per year. | 2. Cultivate future FM's through offering at least one event targeted toward our chapter membership each year.  
  2a. Provide at least one scholarship per year for one class in the credential program. | | |
<p>| | 3. Leverage IFMA SD website information to support Education and Professional Development. | 3. Obtain an average approval rating less than two on surveys. | 3. E&amp;PD responsible for providing fresh web content consistently. | | |</p>
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<td>Finance</td>
<td>1. Sustain strong financial position established in past 5 years.</td>
<td>1. Maintain adequate reserves.</td>
<td>1. Manage to reserves of 50% of previous year’s expenditures.</td>
<td>Champions:  • Chapter Treasurer (Gayle Lorenc)</td>
<td>1. Investigate and implement more cost effective alternatives for payment processing.</td>
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<td>2. Diversification of revenue sources.</td>
<td>2. Support efforts of key revenue committees (Golf, Sponsorship, Membership) evaluating program effectiveness.</td>
<td>2. Sustain 100% collective net return on fund raising events and programs.</td>
<td>Accountability:  • Executive Board  • Committee Chairs  • Chapter Administrator</td>
<td>2. Review event proposals and opportunities for revenue generation and/or cost reductions. Conduct cost benefit review and analysis within two months of events.</td>
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<td>4. Identify and train a Treasurer for transition 2017 – 2018.</td>
<td>4. Find volunteer to take over as Chapter Treasurer.</td>
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<td>Fireside Chats &amp;</td>
<td>1. Encourage membership participating in events, education, and sponsorship opportunities in small group settings.</td>
<td>1. Schedule two meetings / mo to meet in small groups with both Professionals and Associates.</td>
<td>1. Meet with 145 members by year end 2017.</td>
<td>Champions: • Lisa Chappell • Melanie Bamba</td>
<td>1. Connect members with the events and education that supports their career objectives.</td>
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<td>Mentoring</td>
<td>2. Solicit feedback on what IFMA San Diego does well and how we can improve. Work with board and committee chairs to implement opportunities for improvement.</td>
<td>2. Provide feedback to board and committees as appropriate.</td>
<td>2. Increase participating in FM Roundtables, AM Power Lunches, and in New Member Breakfasts.</td>
<td>Accountability: • Executive Board</td>
<td>2. Match members with committees and activities that support their objectives.</td>
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<td>3. Schedule check-in meeting opportunities quarterly.</td>
<td>3. Provide Sponsorship Committee and Events Committee with leads for new sponsors.</td>
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<td>3. Pair members with mentors as requested and manage relationship.</td>
</tr>
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<td>Golf Event</td>
<td>1. The Golf Committees goal each and every year is to improve our 1st class event for the enjoyment of the participants, to offer increased value to our Sponsors, and to support our immediate community.</td>
<td>1. Increase annual sponsorship and tournament sponsorship levels.</td>
<td>1. Increase Chapter year-over-year Net Income by 10%.</td>
<td>Champions: • Paul Fitzgerald</td>
<td>1. Establish strategic venue roadmap for sustained event success – Complete, Venue contracted through 2019.</td>
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<td>2. Increase participant satisfaction.</td>
<td>2. Increase Beneficiary year-over-year donations by 10%.</td>
<td>Accountability: • Executive Board</td>
<td>2. Identify and integrate new event beneficiary – Complete, Ronald McDonald House of Charities SD.</td>
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<td>3. Increase participant demographics (Female Members, Individual Members, etc.).</td>
<td>3. Increase non sponsorship tournament participation by 10%.</td>
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<td>3. Integrate on-line auction for increased sponsorship visibility, non-golfer participation, and revenue – Complete.</td>
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<td>4. Promote committee visibility and participation by integrating new committee members’ y-o-y – In progress.</td>
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<td>Development</td>
<td>the Chapter.</td>
<td>2. Determine and maintain annual chapter sponsorship.</td>
<td>2. By October 2017, conduct at least one outreach by participating in</td>
<td>Accountability: Executive Board</td>
<td>2. Write newsletter article promoting Foundation.</td>
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<td>2. Encourage Chapter support of the Foundation.</td>
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<td>school / community event(s).</td>
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<td>3. Enlist assistance from membership and/or Academic Development committee.</td>
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<td>3. Outreach to young potential FM talent.</td>
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<td>4. Request annual Foundation sponsorship by Board.</td>
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<td>Job Bank (Sub of Communications)</td>
<td>1. Provide a platform and resources for members to help them</td>
<td>1. Have ongoing bank of potential jobs available to members or candidates</td>
<td>1. Have an average of 1 new posting per week.</td>
<td>Champions: Jeff Niles</td>
<td>5. Enlist assistance from Foundation and other chapters (such as Inland Empire) who have made advances and can provide advice.</td>
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<tr>
<td></td>
<td>find a job.</td>
<td>interested in facilities.</td>
<td>2. Have 3-5 core organizations funneling available positions into the</td>
<td>Ryan Fehr</td>
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<td></td>
<td>2. Provide a platform for current and potential membership</td>
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<td>bank.</td>
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<td>organizations to post open and upcoming positions within the</td>
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<td>3. Bank should have 15-20 active postings that are less than 60 days</td>
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<td></td>
<td>industry.</td>
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<td>old.</td>
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<td></td>
<td>3. Use Job Bank as a strategic marketing tool to gather new</td>
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<td>4. After 6 months of implementations, develop 3 success stories to</td>
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<td></td>
<td>members through organizations.</td>
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<td>share with membership.</td>
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| Membership | 1. Grow number of new members. | 1. Chapter membership increase. | 1. By June 30, 2018, grow membership to 415. | **Champions:**  
- Lydia Reyes  
- Ben Friesen | **1.** Hold Annual Campaign – New Member Blitz – “IFMA Mania”. Grand prize winner awarded that December at Holiday Social Event.  
**1B)** Call and email each new member prior to Roundtable Event.  
**1C)** Conduct new Member Breakfast every 4 months. |
| | 2. Retain existing members. | 2. No net decrease. | 2. Achieve a 80% renewal rate. | **Accountability:**  
- Membership Committee  
- Board of Directors  
- Communication Committee | **2.** On a monthly basis: (Goal is 7 total touches – international and local chapter).  
**2A)** Call and/or email each renewed member.  
**2B)** Call and email members up for renewal 30 days prior to membership expiration.  
**2C)** Reach out to all dropped members for possible renewal – Non-renewing member survey and follow up phone call. |
<p>| | 3. Increase attendance at roundtables. | 3. Increase roundtable attendance to 20 FM's per location. | 3. Set topics for each roundtable, and bring in guest speakers to increase educational value and attendance. |  | <strong>3.</strong> Set topics for each roundtable, and bring in guest speakers to increase educational value and attendance. Make sure to call all members with a personal invitation. Coordinate with Caryn and Communications Committee to make sure invitations start to go out at least 1 month before the roundtable event. |
| | 3. Target specific large companies with multiple FM’s for recruitment. | 4. Engage San Diego companies with multiple FM’s on staff. | 4. By June 30, 2018, add 3 new large companies to our membership roster with multiple FM members each. |  | <strong>4.</strong> Research and target key SD County companies. Call and recruit new FM's to join. |</p>
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<td><strong>Special Events</strong></td>
<td>1. Coordinate and execute social and networking events for IFMA San Diego Chapter.</td>
<td>1. Coordinate a minimum of (2) networking events per year.</td>
<td>1. Consistent monthly meetings.</td>
<td><strong>Champions:</strong></td>
<td>1. Event coordination and communication.</td>
</tr>
<tr>
<td><strong>Committee</strong></td>
<td></td>
<td>2. Coordinate logistics for various IFMA events.</td>
<td>2. Create awareness of IFMA SD through networking and social events.</td>
<td><strong>Kristen Finneran</strong></td>
<td>2. Increase attendance, awareness and sponsorship with each event.</td>
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<td>3. Increase sponsorship opportunities within events.</td>
<td><strong>Karen Trapane</strong></td>
<td>3. Execute (2) Leverage Your Beverage events per year.</td>
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<td><strong>Accountability:</strong></td>
<td>4. Logistics and planning of Holiday party.</td>
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<td><strong>Executive Board</strong></td>
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<td><strong>Committee Chairs</strong></td>
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<td><strong>Sponsorship</strong></td>
<td>1. Increase Annual Sponsorship Revenue by 20% each year.</td>
<td>1. Promote Sponsorship and search out new sponsors throughout the year.</td>
<td>1. Sponsorship Revenue goal for 2017 is $41,400.</td>
<td><strong>Champions:</strong></td>
<td>1. Reach out periodically to membership to communicate the value of sponsorship to the chapter, encouraging them to utilize sponsor companies.</td>
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<td>2. Maintain existing sponsorships with current vendors.</td>
<td>2. Communicate with existing sponsors on a regular basis.</td>
<td>2. Communicate with sponsors on a monthly basis.</td>
<td><strong>Kristen Finneran</strong></td>
<td>2. Maintain relationships with current sponsors through Buddy program (i.e. each committee member is assigned to multiple sponsors to help them take advantage of benefits throughout the year).</td>
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<td>3. Encourage Sponsors to take advantage of the benefits included in their sponsorship package.</td>
<td>3. Sponsors utilize more program benefits throughout the year.</td>
<td>3. Maintain Annual Schedule for the sponsors identifying which months they use their benefits.</td>
<td><strong>Karen Trapane</strong></td>
<td>3. Conduct Annual Sponsorship campaigns beginning in October to recruit new sponsors.</td>
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<td><strong>Accountability:</strong></td>
<td>4. Gather testimonials from current sponsors to demonstrate the ROI of sponsorship to membership at large.</td>
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<td><strong>Executive Board</strong></td>
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<td><strong>Committee Chairs</strong></td>
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<td><strong>Succession Planning</strong></td>
<td>1. To connect members to volunteer opportunities on Board as committee chair or Executive Board.</td>
<td>1. Annually in May, identify candidates for the Executive Board and submit slate of officers for board approval.</td>
<td>1. All committee positions are filled.</td>
<td><strong>Champions:</strong></td>
<td>1. Connect interested people in the committee positions and board positions.</td>
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<td>2. On-going placement of members to committees.</td>
<td>2. Executive Board positions are filled.</td>
<td><strong>Marcia Fisher</strong></td>
<td>2. Seek out new members for committees if needed.</td>
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<td><strong>Accountability:</strong></td>
<td>3. Seek out potential candidates for Executive Board.</td>
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<td><strong>Executive Board</strong></td>
<td>4. Slate of officers to be submitted in May for June election ballot to go out to the chapter.</td>
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<td>Sustainability</td>
<td>1. Increase the value and usability of the Sustainability web page.</td>
<td>1. Chapter Membership surveys.</td>
<td>1. One (1) Annually.</td>
<td><strong>Champions:</strong> Mike O’Brien</td>
<td>1a. Add new resource links and update existing ones on a quarterly basis.</td>
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<td><strong>Accountability:</strong> Executive Board, Committee Chairs</td>
<td>1b. Assess web page structure and optimize as appropriate on a quarterly basis.</td>
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<td>2. Publicize sustainability-related events in the surrounding community.</td>
<td>2. Quantity of postings.</td>
<td>2. One (1) new postings per month.</td>
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<td>1c. Add sections to list community events and educational opportunities related to sustainability on chapter calendar.</td>
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<td>3. Improve awareness of non-IFMA educational opportunities.</td>
<td>3. Quantity of postings and variety of education providers.</td>
<td>3. Identify three (3) new education providers, five (5) new postings per month by June 30, 2016.</td>
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<td>1d. Perform semi-annual reviews of all resource links; maintain a minimum of fifty high-quality, resources by category.</td>
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<td>4. Sponsor the development of sustainability-related content and educational presentations related to sustainability.</td>
<td>4a. Meeting Presentations. 4b. Web Site/newsletter content.</td>
<td>4a. One per year. 4b. One per year.</td>
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<td>2a. Establish methodologies for “mining” upcoming event information.</td>
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<td>2b. Develop network of “sustainability affiliates” for information exchange.</td>
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<td>2c. Post events on web page and announce at chapter meetings minimum 2 per month.</td>
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<td>3a. Establish methodologies for “mining” upcoming class information.</td>
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<td>3b. Create directory of sustainability education providers.</td>
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<td></td>
<td>3c. Post educational opportunities on web page and announce at chapter meetings.</td>
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<td>4a. Present on a rotating slate of sustainability-related topics at luncheon and/or breakfast meetings.</td>
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<td>4b. Develop web site and newsletter content as timely and appropriate.</td>
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<td>Committee</td>
<td>Strategic Objectives</td>
<td>Measures</td>
<td>Targets</td>
<td>Accountability</td>
<td>Initiatives</td>
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| Venues & Menus | 1. Support the Chapter to provide all requirements for successful luncheons and other programs to include: location; infrastructure set up; Food; AV; Food Service; Parking, etc.  
2. Other. Review Meeting Requirements Document and make any changes to the requirements as applicable on an ongoing basis. | 1. Track member surveys for level of satisfaction.  
2. Develop communication process with Education Committee to collect real time updates on changes in programs that impact location/requirements. | 1. 70% customer delight.  
2. Communication process in place September 2017 | **Champions:**  
- Chiloh Baty  
- Lauren Francis  
- Linda Crawford  
**Accountability:**  
- Member Surveys  
- Education Com: Kate Mood; Lisa Chappel  
- Board of Directors: Gayle Lorenc  
- Maintain Budget Compliance: Gayle Lorenc | 1. Research market for 2017 event costs for hotels within demographic of our members.  
2. Break out events by category and set a budget guideline for each category, i.e., Monthly luncheons; Breakfast/Afternoon meetings; etc.  
3. Get market data, work with Treasurer to set realistic budget.  
4. Select 2-3 venues, build a strong partnership with each to ensure our requirements are met/exceeded and member-focused so people will look forward to and attend these events. |