



2017 – 2018 IFMA SD 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

Committee	Strategic Objectives	Measures	Targets	Accountability	Initiatives
Associates	<ol style="list-style-type: none"> 1. Keep Industry Partners engaged, participating, and satisfied with their membership. 	<ol style="list-style-type: none"> 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). 	<ol style="list-style-type: none"> 1. Consistent quarterly communication. 2. Create awareness of IFMA SD through networking and social events. 3. Increase sponsorship opportunities within communication. 	<p><u>Champions:</u></p> <ul style="list-style-type: none"> • Stephanie Kozlowski • Jessica Kalloch <p><u>Accountability:</u></p> <ul style="list-style-type: none"> • Executive Board 	<ol style="list-style-type: none"> 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: <ul style="list-style-type: none"> • David Suter • Donna Frick • Steve Milinkevich Accountability: <ul style="list-style-type: none"> • 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. 1. Begin consistent communication with all committees. 2. Use technology based platforms (like Swivel) to record and showcase our monthly luncheons on-line.
	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.		
	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.	Champions: <ul style="list-style-type: none"> • David Suter • Donna Frick • Steve Milinkevich Accountability: <ul style="list-style-type: none"> • Marketing Committee • Executive Board 	
	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.		

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Community Service	<ol style="list-style-type: none"> 1. Increase awareness of IFMA SD in the community through volunteer work and monetary donations. 2. Provide opportunities for IFMA members to give back to the community. 	<ol style="list-style-type: none"> 1. Coordinate a minimum of (2) volunteer work projects. 2. Coordinate new and ongoing outreach opportunities. 3. Increase direct opportunities for members to underwrite various community outreach programs by 15%. 	<ol style="list-style-type: none"> 1. Organize community service work parties during the spring, summer, fall – promote to all members. 2. Increase visibility of IFMA donation activities on the various charity websites IFMA donates to. 3. Create template for ongoing fundraising activities by IFMA community service committee. 4. Raise monetary and in kind donations by 5% in 2017. Increase by 5% annually. 5. Quantify in kind donations for 2017. 	<p><u>Champions:</u></p> <ul style="list-style-type: none"> • Vicky Cate • Rachel Willis <p><u>Accountability:</u></p> <ul style="list-style-type: none"> • Core Committee: Vicky Cate Sheryl Chaffee Juli Harris Rachel Willis Michael Siddall Heather Collins Theresa Rojas 	<ol style="list-style-type: none"> 1. Create ongoing support through donation and volunteer time at various shelter locations. 2. Christmas decorating at various children's and emergency shelters. 3. Hold a canned food/clothing Drive. 4. Orchestrating opportunities to underwrite volunteering efforts at Christmas Luncheon and IFMA's annual golf tournament. 5. Keep IFMA members updated on the progress of the charity contributions. 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.

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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: <ul style="list-style-type: none"> • Lisa Chappell • Denise Colestock Accountability: <ul style="list-style-type: none"> • E&PD 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.		
	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&PD responsible for providing fresh web content consistently.		

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Finance	<ol style="list-style-type: none"> 1. Sustain strong financial position established in past 5 years. 2. Diversification of revenue sources. 3. Optimize resource utilization. 4. Identify and train a Treasurer for transition 2017 – 2018. 	<ol style="list-style-type: none"> 1. Maintain adequate reserves. 2. Support efforts of key revenue committees (Golf, Sponsorship, Membership) evaluating program effectiveness. 3. Balanced, optimal use of Chapter funding and volunteer efforts (administration, communication, education, community service). 4. Find volunteer to take over as Chapter Treasurer. 	<ol style="list-style-type: none"> 1. Manage to reserves of 50% of previous year's expenditures. 2. Sustain 100% collective net return on fund raising events and programs. 3. Conduct ongoing cost benefit evaluations of Chapter programs. Offset costs with revenue to maintain 50% reserve. 	<p><u>Champions:</u></p> <ul style="list-style-type: none"> • Chapter Treasurer (Gayle Lorenc) <p><u>Accountability:</u></p> <ul style="list-style-type: none"> • Executive Board • Committee Chairs • Chapter Administrator 	<ol style="list-style-type: none"> 1. Investigate and implement more cost effective alternatives for payment processing. 2. Review event proposals and opportunities for revenue generation and/or cost reductions. Conduct cost benefit review and analysis within two months of events. 3. Establish consistent reporting: <ul style="list-style-type: none"> • Monthly – Financial Report • Annually: <ul style="list-style-type: none"> May – Draft FY (Jul-Jun) budget Jul – Finalize budget and prepare Recertification Submittal Aug – Report to general membership Sep – Set sponsorship program levels Nov – Internal audit Jan – Mid-Yr review and Chapter Dues submission. Mar – Submit Dues Revision 4. Find a volunteer and train to take over as Chapter Treasurer for transition in 2017-2018.

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Fireside Chats & Mentoring	<ol style="list-style-type: none"> 1. Encourage membership participating in events, education, and sponsorship opportunities in small group settings. 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. 	<ol style="list-style-type: none"> 1. Schedule two meetings / mo to meet in small groups with both Professionals and Associates. 2. Provide feedback to board and committees as appropriate. 3. Schedule check-in meeting opportunities quarterly. 	<ol style="list-style-type: none"> 1. Meet with 145 members by year end 2017. 2. Increase participating in FM Roundtables, AM Power Lunches, and in New Member Breakfasts. 3. Provide Sponsorship Committee and Events Committee with leads for new sponsors. 	<p><u>Champions:</u></p> <ul style="list-style-type: none"> • Lisa Chappell • Melanie Bamba <p><u>Accountability:</u></p> <ul style="list-style-type: none"> • Executive Board 	<ol style="list-style-type: none"> 1. Connect members with the events and education that supports their career objectives. 2. Match members with committees and activities that support their objectives. 3. Pair members with mentors as requested and manage relationship.
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Golf Event	<ol style="list-style-type: none"> 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. 	<ol style="list-style-type: none"> 1. Increase annual sponsorship and tournament sponsorship levels. 2. Increase participant satisfaction. 3. Increase participant demographics (Female Members, Individual Members, etc). 	<ol style="list-style-type: none"> 1. Increase Chapter year-over-year Net Income by 10%. 2. Increase Beneficiary year-over-year donations by 10%. 3. Increase non sponsorship tournament participation by 10%. 	<p><u>Champions:</u></p> <ul style="list-style-type: none"> • Paul Fitzgerald <p><u>Accountability:</u></p> <ul style="list-style-type: none"> • Executive Board 	<ol style="list-style-type: none"> 1. Establish strategic venue roadmap for sustained event success – Complete, Venue contracted through 2019. 2. Identify and integrate new event beneficiary – Complete, Ronald McDonald House of Charities SD. 3. Integrate on-line auction for increased sponsorship visibility, non-golfer participation, and revenue – Complete. 4. Promote committee visibility and participation by integrating new committee members' y-o-y – In progress.

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IFMA Foundation / Academic Development	<ol style="list-style-type: none"> 1. Provide conduit of information between the foundation and the Chapter. 2. Encourage Chapter support of the Foundation. 3. Outreach to young potential FM talent. 	<ol style="list-style-type: none"> 1. Foster relationship with regional Foundation Rep. 2. Determine and maintain annual chapter sponsorship. 3. Develop 2017 "Facilithon" Event. 	<ol style="list-style-type: none"> 1. By June 2017, develop action plan for 2017 event. 2. By October 2017, conduct at least one outreach by participating in school / community event(s). 	<p>Champions:</p> <ul style="list-style-type: none"> • Jolie Lucas <p>Accountability:</p> <ul style="list-style-type: none"> • Executive Board 	<ol style="list-style-type: none"> 1. Report foundation issues to the chapter board at board meetings. 2. Write newsletter article promoting Foundation. 3. Enlist assistance from membership and/or Academic Development committee. 4. Request annual Foundation sponsorship by Board. 5. Enlist assistance from Foundation and other chapters (such as Inland Empire) who have made advances and can provide advice.
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Job Bank (Sub of Communications)	<ol style="list-style-type: none"> 1. Provide a platform and resources for members to help them find a job. 2. Provide a platform for current and potential membership organizations to post open and upcoming positions within the industry. 3. Use Job Bank as a strategic marketing tool to gather new members through organizations. 	<ol style="list-style-type: none"> 1. Have ongoing bank of potential jobs available to members or candidates interested in facilities. 2. Have automated email go out to poster of job once approved within 24 hours of posting. 3. Automated email that goes out monthly to poster of job with updates on "clicks", interest in position and confirmation if position is still available. 4. Email blast showing opportunities that have become available with link to Job bank. 	<ol style="list-style-type: none"> 1. Have an average of 1 new posting per week. 2. Have 3-5 core organizations funneling available positions into the bank. 3. Bank should have 15-20 active postings that are less than 60 days old. 4. After 6 months of implementations, develop 3 success stories to share with membership. 	<p>Champions:</p> <ul style="list-style-type: none"> • Jeff Niles • Ryan Fehr <p>Accountability:</p> <ul style="list-style-type: none"> • Executive Board • Communications Chairs 	<ol style="list-style-type: none"> 1. Connect Job bank to IFMA career website so local jobs posts nationally. 2. Open up discussions with membership on creating marketing program to use Job Bank as a way to funnel new members into organization. 3. Work with Education Committee to discuss how members obtaining credentials can increase earning potential and are aware of new jobs available in Job Bank that may align with new skills learned.

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Membership	<ol style="list-style-type: none"> 1. Grow number of new members. 2. Retain existing members. 3. Increase attendance at roundtables. 3. Target specific large companies with multiple FM's for recruitment. 	<ol style="list-style-type: none"> 1. Chapter membership increase. 2. No net decrease. 3. Increase roundtable attendance to 20 FM's per location. 4. Engage San Diego companies with multiple FM's on staff. 	<ol style="list-style-type: none"> 1. By June 30, 2018, grow membership to 415. 2. Achieve a 80% renewal rate. 3. Set topics for each roundtable, and bring in guest speakers to increase educational value and attendance. 4. By June 30, 2018, add 3 new large companies to our membership roster with multiple FM members each. 	<p><u>Champions:</u></p> <ul style="list-style-type: none"> • Lydia Reyes • Ben Friesen <p><u>Accountability:</u></p> <ul style="list-style-type: none"> • Membership Committee • Board of Directors • Communication Committee 	<ol style="list-style-type: none"> 1. Hold Annual Campaign – New Member Blitz – “IFMA Mania”. Grand prize winner awarded that December at Holiday Social Event. <ol style="list-style-type: none"> 1B) Call and email each new member prior to Roundtable Event. 1C) Conduct new Member Breakfast every 4 months. 2. On a monthly basis: (Goal is 7 total touches – international and local chapter). <ol style="list-style-type: none"> 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. 3. 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. 4. Research and target key SD County companies. Call and recruit new FM's to join.

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Special Events Committee	<ol style="list-style-type: none"> 1. Coordinate and execute social and networking events for IFMA San Diego Chapter. 	<ol style="list-style-type: none"> 1. Coordinate a minimum of (2) networking events per year. 2. Coordinate logistics for various IFMA events. 	<ol style="list-style-type: none"> 1. Consistent monthly meetings. 2. Create awareness of IFMA SD through networking and social events. 3. Increase sponsorship opportunities within events. 	<p>Champions:</p> <ul style="list-style-type: none"> • Marcy Harold <p>Accountability:</p> <ul style="list-style-type: none"> • Executive Board 	<ol style="list-style-type: none"> 1. Event coordination and communication. 2. Increase attendance, awareness and sponsorship with each event. 3. Execute (2) Leverage Your Beverage events per year 4. Logistics and planning of Holiday party.

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Sponsorship	<ol style="list-style-type: none"> 1. Increase Annual Sponsorship Revenue by 20% each year. 2. Maintain existing sponsorships with current vendors. 3. Encourage Sponsors to take advantage of the benefits included in their sponsorship package. 	<ol style="list-style-type: none"> 1. Promote Sponsorship and search out new sponsors throughout the year. 2. Communicate with existing sponsors on a regular basis. 3. Sponsors utilize more program benefits throughout the year. 	<ol style="list-style-type: none"> 1. Sponsorship Revenue goal for 2017 is \$41,400. 2. Communicate with sponsors on a monthly basis. 3. Maintain Annual Schedule for the sponsors identifying which months they use their benefits. 	<p>Champions:</p> <ul style="list-style-type: none"> • Kristen Finneran • Karen Trapane <p>Accountability:</p> <ul style="list-style-type: none"> • Executive Board • Committee Chairs 	<ol style="list-style-type: none"> 1. Reach out periodically to membership to communicate the value of sponsorship to the chapter, encouraging them to utilize sponsor companies. 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). 3. Conduct Annual Sponsorship campaigns beginning in October to recruit new sponsors. 4. Gather testimonials from current sponsors to demonstrate the ROI of sponsorship to membership at large.

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Succession Planning	<ol style="list-style-type: none"> 1. To connect members to volunteer opportunities on Board as committee chair or Executive Board. 	<ol style="list-style-type: none"> 1. Annually in May, identify candidates for the Executive Board and submit slate of officers for board approval. 2. On-going placement of members to committees. 	<ol style="list-style-type: none"> 1. All committee positions are filled. 2. Executive Board positions are filled. 	<p>Champions:</p> <ul style="list-style-type: none"> • Marcia Fisher <p>Accountability:</p> <ul style="list-style-type: none"> • Executive Board 	<ol style="list-style-type: none"> 1. Connect interested people in the committee positions and board positions. 2. Seek out new members for committees if needed. 3. Seek out potential candidates for Executive Board. 4. Slate of officers to be submitted in May for June election ballot to go out to the chapter.

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Sustainability	1. Increase the value and usability of the Sustainability web page.	1. Chapter Membership surveys.	1. One (1) Annually.	<u>Champions:</u> <ul style="list-style-type: none"> • Mike O'Brien <u>Accountability:</u> <ul style="list-style-type: none"> • Executive Board • Committee Chairs 	1a. Add new resource links and update existing ones on a quarterly basis.
	2. Publicize sustainability-related events in the surrounding community.	2. Quantity of postings.	2. One (1) new postings per month.		1b. Assess web page structure and optimize as appropriate on a quarterly basis.
	3. Improve awareness of non-IFMA educational opportunities.	3. Quantity of postings and variety of education providers.	3. Identify three (3) new education providers, five (5) new postings per month by June 30, 2016.		1c. Add sections to list community events and educational opportunities related to sustainability on chapter calendar.
	4. Sponsor the development of sustainability-related content and educational presentations related to sustainability.	4a. Meeting Presentations. 4b. Web Site/newsletter content.	4a. One per year. 4b. One per year.		1d. Perform semi-annual reviews of all resource links; maintain a minimum of fifty high-quality, resources by category.
					2a. Establish methodologies for "mining" upcoming event information.
					2b. Develop network of "sustainability affiliates" for information exchange.
					2c. Post events on web page and announce at chapter meetings minimum 2 per month.
					3a. Establish methodologies for "mining" upcoming class information.
					3b. Create directory of sustainability education providers.
					3c. Post educational opportunities on web page and announce at chapter meetings.
					4a. Present on a rotating slate of sustainability-related topics at luncheon and/or breakfast meetings.
					4b. Develop web site and newsletter content as timely and appropriate.

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Venues & Menus	<ol style="list-style-type: none"> 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. 	<ol style="list-style-type: none"> 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. 	<ol style="list-style-type: none"> 1. 70% customer delight. 2. Communication process in place September 2017 	<p><u>Champions:</u></p> <ul style="list-style-type: none"> • Chiloh Baty • Lauren Francis • Linda Crawford <p><u>Accountability:</u></p> <ul style="list-style-type: none"> • Member Surveys • Education Com: Kate Mood; Lisa Chappel • Board of Directors: Gayle Lorenc • Maintain Budget Compliance: Gayle Lorenc 	<ol style="list-style-type: none"> 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.