



## 2013 – 2017 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
<b>Communications</b>	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, have increased blog views by 15% annually.	<b>Champions:</b> <ul style="list-style-type: none"> <li>David Suter</li> <li>Donna Frick</li> <li>Katie Blizzard</li> </ul> <b>Accountability:</b> <ul style="list-style-type: none"> <li>Communications Committee</li> <li>Executive Board</li> </ul>	<ol style="list-style-type: none"> <li>Continue use of social media to promote FM related stories and events.</li> <li>Host annual luncheon or event (e.g. workshop before luncheon). Spotlight website and online resources.</li> <li>Partner with other winning chapters and provide webinars on Best Practices in Chapter Communications.</li> <li>Integrate the use of Constant Contact as part of this committee.</li> <li>Submit original content to the West Coast Regional Insider.</li> <li>Submission location on website – queue for review.</li> <li>Enlist more volunteers to write stories and post topics.</li> <li>Use Facebook as a platform for photos.</li> <li>Publish monthly member spotlight.</li> </ol>
	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 2015, have a paid Web Administration. By July 2018, have an IFMA intranet site set up for member forums.		
	3. Be a leader in Communications among IFMA chapters.	3. Connect with other chapters and offer to help them build up their communications.	3. Submit for Website of Year in 2015 and 2018		

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<b>Membership</b>	1. Grow number of new members	1. Chapter membership increase	1. By July 2018, grow membership annually by 12%	<b><u>Champions:</u></b> <ul style="list-style-type: none"> <li>• Lydia Reyes</li> <li>• Ben Friesen</li> <li>• DJ Lied</li> </ul> <b><u>Accountability:</u></b> <ul style="list-style-type: none"> <li>• Membership Committee</li> <li>• Board of Directors</li> <li>• Communication Committee</li> </ul>	1. Hold Annual Campaign – New Member Blitz. Announce in August. Grand Prize Winner awarded that December at Holiday Social Event. 1A) Create “New Member Welcome Packet” and “Certificate”. Update Annually. Insert IFMA Foundation info. 1B) Call and email each new member in Roundtable area. 1C) Conduct new Member Breakfast every 3 months 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. 3. Research and identify new target area for a new roundtable for FM’s. Add to current Quarterly RT’s. 4. Grow and maintain program 4A) Recruit 5 new FM’s certified CFM, FMP, or SFP’s to help grow program 5. Review Q1, send updates by September to print and distribute at October meeting.
	2. Retain existing members	2. No net decrease	2. Achieve a 80% renewal rate		
	3. Expand roundtable programs	3. Increase roundtable options for FM’s	3. Add a new Roundtable for FM’s in one new geographical area every other year.		
	4. Grow Mentorship Program	4. Expand program for FM mentorship	4. 5 mentorship pairs each year.		
	5. Publish Resource Directory	5. Update and Improve Directory	5. Update Directory in Fall of every year. (Chapters Q1 Fiscal Year)		

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<b>Education &amp; Professional Development</b>	1. Provide and engage stakeholders with opportunities to expand and leverage their collective knowledge and experience.	1. Develop an education program that supports the 11 IFMA competencies.	2. Strive to cover each competency over every 18 month calendar. Add at least 5 new CFM's, FMP's and SFP's to our membership each year	<b>Champions:</b> <ul style="list-style-type: none"> <li>• Lisa Chappell</li> <li>• Kate Mood</li> </ul> <b>Accountability:</b> <ul style="list-style-type: none"> <li>• E&amp;PD Committee</li> <li>• Executive Board</li> </ul>	1. Present informative programs that focus on the latest developments and new technologies for the profession. 2. Provide and manage the CFM, FMP and SFP programs for Chapter Members. Offer one or more CFM, FMP and SFP educational opportunity per year 3. Create one educational event per year targeted specifically for future FM's. Obtain an average approval rating greater than four on surveys under EP&D control for each program
	2. Provide and manage the CFM, FMP and SFP programs for Chapter Members	2. Appoint a leader to coordinate and promote programs. Offer one or more CFM, FMP and SFP educational opportunity per year	2. Cultivate future FM's through offering at least one event targeted toward young professionals each year.		
	3. Cultivate future FM through supporting at least (1) educational event each year.	3. Offer one educational event targeted for young professionals each year.	3. Obtain an average approval rating greater than four on surveys under E&PD control for each program		
	4. Obtain an average approval rating greater than four on surveys (areas under E&PD Control) for each program.	4. Obtain an average approval rating greater than four on surveys (areas under E&PD Control) for each program.			

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<b>Community Service</b>	1. Increase awareness of IFMA SD in the community through volunteer work and monetary donations.	1. a. Link website of SDYS to IFMA San Diego.  b. Monthly newsletter articles about SDYS from SDYS.	1. a. Increase visibility of IFMA donation activities on SDYS website.  b. Increase visibility of community service activities on IFMA website.	<b>Champions:</b> <ul style="list-style-type: none"> <li>• Vicky Kate</li> <li>• Doug Stocker</li> <li>• Juli Harris</li> <li>• Sheryl Wolfe-Chaffee</li> </ul> <b>Accountability:</b> <ul style="list-style-type: none"> <li>• Community Services Committee</li> <li>• Executive Board</li> </ul>	1. a. Add new links to the website for SDYS. b. Add section to keep IFMA members updated on the progress of the charity contributions to SDYS.  2. a. Advertise opportunities for ongoing volunteer time at SDYS locations as determined by SDYS staff needs. b. Continue Annual event: Christmas decorating at emergency children's shelter. c. Initiates: <ul style="list-style-type: none"> <li>• Canned food/clothing Drive</li> <li>• Textile Recycling as fundraiser (spring &amp; fall)</li> </ul> 3. a. Fund raising for SDYS at Christmas Luncheon and IFMA's annual golf tournament. b. Create structure for ongoing SDYS fundraising by IFMA Community Service Committee.
	2. Provide opportunities for IFMA members to give back to the community with in kind volunteer opportunities	4. Increase by 2 the volunteer work projects and ongoing outreach opportunities.	2. a. Organize spring, summer, and fall SDYS work party.  b. Quantify in kind donations annually.		
	3. Provide direction for IFMA member monetary donations directly to SDYS.	3. Increase the direct donations from IFMA members for SDYS annually.	3. Increase direct monetary donations from IFMA members to SDYS by 10% annually.		

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<b>Finance</b>	1. Sustain strong financial position established in past 5 years	1. Maintain adequate reserves	1. Manage to reserves of 50% of previous year's expenditures.	<b>Champions:</b> <ul style="list-style-type: none"> <li>Chapter Treasurer (Gayle Lorenc)</li> </ul> <b>Accountability:</b> <ul style="list-style-type: none"> <li>Executive Board</li> <li>Committee Chairs</li> <li>Chapter Administrator</li> </ul>	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"> <li>Monthly – Financial Report</li> <li>Annually: <ul style="list-style-type: none"> <li>May – Draft FY (Jul-Jun) budget</li> <li>Jul – Finalize budget and prepare Recertification Submittal</li> <li>Aug – Report to general membership</li> <li>Sep – Set sponsorship program levels</li> <li>Nov – Internal audit</li> <li>Jan – Mid-Yr review and Chapter Dues submission.</li> <li>Mar – Submit Dues Revision</li> </ul> </li> </ul>
	2. Diversification of revenue sources.	2. Support efforts of key revenue committees (Golf, Sponsorship, Membership) evaluating program effectiveness.	2. Sustain 100% collective net return on fund raising events and programs.		
	3. Optimize resource utilization	3. Balanced, optimal use of Chapter funding and volunteer efforts (administration, communication, education, community service).	3. Conduct ongoing cost benefit evaluations of Chapter programs. Offset costs with revenue to maintain 50% reserve.		

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Sponsorship	1. Increase Annual Sponsorship Revenue to \$50K over 5 years.	1. Promote Sponsorship and search out new sponsors throughout the year.	1. Sponsorship Revenue increases \$2.5 each year	<b>Champions:</b> <ul style="list-style-type: none"> <li>• Keith Chrapczynski</li> </ul> <b>Accountability:</b> <ul style="list-style-type: none"> <li>• Executive Board</li> <li>• Committee Chairs</li> </ul>	1. Conduct Annual Sponsorship Drives. 2. Reach out to all current sponsors and develop a closer relationship. 3. Conduct Annual Sponsorship Drives. 4. Propose alternative sponsorship option to Board to promote additional sponsorship to smaller companies. 5. Goals by year January 2014, \$40,500 January 2015, \$43,000 January 2016, \$45,500 January 2017, \$48,000 January 2018, \$50,000
	2. Maintain existing sponsorships with current vendors.	2. Communicate with existing sponsors on a regular basis.	2. Communicate with sponsors on a monthly basis.		
	3. Encourage Sponsors to take advantage of the benefits included in their sponsorship package.	3. Sponsors utilize more program benefits throughout the year.	3. Create Annual Schedule for the sponsors identifying which months they use their benefits.		
	4. Consider an additional entry level sponsorship	4. Propose an entry level sponsorship (\$1,000)(?) and present to board for consideration	4. Board decision whether they wish to approve or not in fall of each year.		

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<b>Sustainability</b>	1. Increase the value and usability of the Sustainability web page	1. Membership surveys	1. One(1) Annually	<b><u>Champions:</u></b> <ul style="list-style-type: none"> <li>• Terry Spain</li> <li>• Bill Golightly</li> <li>• Carol Whitmore</li> </ul> <b><u>Accountability:</u></b> <ul style="list-style-type: none"> <li>• Executive Board</li> <li>• Committee Chairs</li> </ul>	1a. Add new resource links and update existing ones 1b. Periodically assess web page structure and optimize as appropriate 1c. Add sections to list community events and educational opportunities related to sustainability 1d. Perform semi-annual reviews of all resource links; maintain a minimum of fifty high-quality, high-assay resources
	2. Publicize sustainability-related events in the surrounding community	2. Quantity of postings and variety of event hosts	2. Average increase of three(3) new event hosts annually, minimum average of two(2) new postings per month by June 30, 2014.		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
	3. Promote SFP Accreditation and provide guidance on the accreditation process	3. Number of accredited chapter members	3. Minimum of one newly accredited annually.		3a. Publicize upcoming SFP preparatory classes 3b. Provide chapter, local, and national statistics pertaining to SFP accreditation 3c. Guide interested candidates through the accreditation process 3d. Offer full or partial SFP scholarship(s) to subsidize the cost of accreditation
	4. Improve awareness of non-IFMA educational opportunities	4. Quantity of postings and variety of education providers	4. Average increase of three(3) new education providers annually, minimum average of five(5) new postings per month by June 30, 2014.		4a. Establish methodologies for "mining" upcoming class information 4b. Create directory of sustainability education providers 4c. Post educational opportunities on web page and announce at chapter meetings
	5. Sponsor the development of sustainability-related content and educational presentations related to sustainability	5a. Meeting Presentations 5b. Web Site/newsletter content	5a. One per year 5b. One per year		5a. Present on a rotating slate of sustainability-related topics at luncheon and/or breakfast meetings 5b. Develop web site and newsletter content as timely and appropriate

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<b>Foundation</b>	1. Provide conduit of information between the Foundation and the Chapter.	1. Foster relationship with regional Foundation Rep.	1. By July 2014, conduct at least two fundraising drives to raise \$500.	<b><u>Champions:</u></b> <ul style="list-style-type: none"> <li>Jolie Lucas</li> </ul> <b><u>Accountability:</u></b> <ul style="list-style-type: none"> <li>Executive Board</li> </ul>	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. Conduct fundraising event (raffle?) at luncheon or other event to raise funds specifically targeted for Foundation. 5. Request annual Foundation sponsorship by board. 6. Conduct annual Foundation fundraising efforts with support from chapter.
	2. Encourage chapter support of the Foundation.	2. Increase annual chapter sponsorship. Support school career fairs.	2. A. By July 2015, develop plan for an annual or perpetual chapter fund-raising effort for Foundation. (Annual raffle? Silent auction? Portion of golf tournament? Etc.)  B. By July 2018, fundraising levels will enable chapter to double sponsorship to \$7000 with fundraising efforts supporting half (\$3500).		



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<b>Academic Development</b>	<ol style="list-style-type: none"> <li>Disseminate information about FM as a career choice to local K-12 and higher education.</li> <li>Develop and foster relationships between IFMA SD and local academic institutions.</li> </ol>	<ol style="list-style-type: none"> <li>Present plan to board for approval.</li> <li>Introduce IFMA to school counselors.</li> <li>Support school career fairs.</li> <li>Establish junior IFMA chapter to mentor.</li> <li>Support local university in establishing an accredited degree program.</li> </ol>	<ol style="list-style-type: none"> <li>By December 2013, have at least one committee meeting to develop plan and identify target schools.</li> <li>By July 2014, have at least two guidance counselors attend IFMA meeting.</li> <li>By July 2014, attend at least two classes or career events.</li> <li>By July 2016, have an established relationship with at least one school and enough students interested in FM to form an FM Club (or piggy-back onto an existing ACE program).</li> <li>By July 2018, support at least an accredited associate's degree program.</li> </ol>	<p><b><u>Champions:</u></b></p> <ul style="list-style-type: none"> <li>Jolie Lucas</li> </ul> <p><b><u>Accountability:</u></b></p> <ul style="list-style-type: none"> <li>Academic Development Committee</li> <li>Executive Board</li> </ul>	<ol style="list-style-type: none"> <li>Establish committee.</li> <li>Identify at least one high school and one higher ed institution to initiate program.</li> <li>Invite guidance counselors to IFMA Lunch meetings.</li> <li>Meet with target schools (meet with counselors, teachers and/or attend career fairs).</li> <li>Propose club or affiliation with identified school personnel.</li> <li>Coordinate with IFMA International to get support for high school level club.</li> <li>Match up support/mentorship to club by chapter members.</li> <li>Meet with target schools (meet with counselors, teachers and/or attend career fairs).</li> </ol>

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<b>Government Affairs</b>	1. Provide members with objective analysis of federal, state and local current, pending and proposed legislation relevant to facility management.	1. Identify and provide analysis on legislations.	1. By July 2014, provide analysis on three relevant legislations for posting on IFMA SD website.	<u><b>Champions:</b></u> <ul style="list-style-type: none"> <li>• David Timber</li> <li>• Doug Stauffer</li> </ul> <u><b>Accountability:</b></u> <ul style="list-style-type: none"> <li>• Governmental Affairs Committee</li> <li>• Executive Board</li> </ul>	1. Review news sources likely to cover state and local legislation such as trade journals, S D Daily Transcript, and websites for news on initiatives, pending and current legislation. 2. Provide synopses to Communication Committee for possible posting on IFMA S D website. 3. Promote interest in government affairs. 4. Select one member to attend the Public Policy Forum in Sept. 2014.
	2. Provide means for San Diego members to communicate with other chapters	2. Increase chapter awareness of legislative process and key industry groups	2. Increase GA Committee membership by two members		

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<b>Marketing &amp; Public Relations Committee</b>	Create new and exciting ways to promote IFMA.	<p>Quantify memberships via San Diego Transcript.</p> <p>Increase IFMA exposure by reaching out to other local publications.</p> <p>A Focus to promote IFMA via its members such as “Whos Who in Construction” and “40 under 40”</p> <p>Increase awareness of CFM Programs. For example, other committees should make Marketing Committee aware of their committee promotions.</p>	<p>Consistent monthly meetings.</p> <p>Create press release for every IFMA event.</p> <p>Continue San Diego Transcript subscription.</p>	<p><b><u>Champions:</u></b></p> <ul style="list-style-type: none"> <li>• Lauren Slatinsky</li> <li>• Jennifer Alexander</li> </ul> <p><b><u>Accountability:</u></b></p> <ul style="list-style-type: none"> <li>• Marketing Committee</li> <li>• Executive Board</li> </ul>	<p>Begin consistent communication with all committees.</p> <p>Exposure of IFMA and select members.</p>