



Chapter Unique Value Proposition

The San Diego Chapter provides a friendly, diverse environment supporting the professional performance of our members through local networking, education, and promotion of facilities management.

2008-2009 Balanced Score Card

<i>Perspective</i>	<i>Strategic Objectives</i>	<i>Measures</i>	<i>Targets</i>	<i>Accountability</i>	<i>Initiatives</i>
STAKEHOLDER	1. Provide and engage stakeholders with opportunities to expand and leverage their collective knowledge and experiences.	1a. Number of new opportunities created. 1b. Membership growth.	1a. Three new opportunities by September 2009. 1b. Membership reaches 300 by January 2010.	CHAMPION: Debra Accountability: Program Committee Membership Committee	<ul style="list-style-type: none"> - Create best practice sharing forums – on line community, roundtables (use IFMA BP forum template). Do two-three each year, maybe first one in October - Online Community – can our Web site do this or can IFMA HQ help - New member mentors/contacts by Membership Committee – calls new member, invites them to next program, answers questions, and provides a connection. - New member breakfasts – introduce committee structure and engage them - Develop industry/interest centers or communities – people volunteer to be the point person on that topic and post information, watch for legislation, agree to answer questions, create online forums for Q&A, and organize conference calls or brown bag lunches. Could attract a corporate sponsor for just that topic.

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STAKEHOLDER	2. Provide resources for facility management professionals to advance their careers.	2a. Number of CFMs and FMPs increase. 2b. Increase average attendance at chapter programs	2a. By July 2010, increase from 39 CFMs to 45; FMPs from 5 to 15. 2b. Average attendance at programs is XX between August 2008 and September 2009.	CHAMPION: Debra Program Committee Board	<ul style="list-style-type: none"> - LEED programming - CFM study groups - Consider hosting competency courses - Have programs that are focused on the competencies - Consider inviting Shari Epstein, Dir. Research, to speak on salary, benchmarking and trends. Sell reports at this meeting. - Have a program that summarizes all the various certifications.

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STAKEHOLDER	3. Advocate the importance of the facility management profession and promote the recognition of the facility management professional.	3a Articles published in local/regional publications 3b New/additional collaborations 3c. Outreach to the C-Suite	3a. Three additional by June 2009. 3b. Two new collaborations by June 2009. 3c. Bosses event by June 2009.	CHAMPION: Debra Board Marketing/PR Committee Program Committee	<ul style="list-style-type: none"> - Support and nurture the UCSD FM Certificate Program (through Past presidents on the advisory board) - Evaluate effectiveness of quarterly Business Journal ads - Identify Marketing/PR chair and develop committee - Leverage IFMA HQ PR Dept for information and resources - Reach out to local HR, do advertising or PR efforts for the newsletter, consider a joint meeting with local SHRM chapter (identify a SHRM contact) to promote FM (maybe this is the Shari Epstein presentation) - California Chamber of Commerce - Have a program to inform bosses about the value of FM - Have a roundtable about where FM has reported. <p>Consider developing an awards program. Recognize achievements. Get BP's in this from IFMA HQ.</p>
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INTERNAL	4. Ensure appropriate human resources and processes are in place.	4a. Volunteer positions identified and filled 4b. Engage members and provide more opportunities for involvement	4a. 95% of volunteer positions filled. 4b. 100 members volunteering in a variety of ways.	Champion: Marcia and Molly	<ul style="list-style-type: none"> - Establish a succession plan to include establishing committee co-chair positions - Fill open Board positions - Brainstorming/networking breakfast to gather ideas and learn best practices from other organizations. - Bring back new member breakfast, new member table, recruitment chair, survey monkey. Increase member touch points/engagement. - Ask members to assist with simple, short term, one time tasks to help and get them engaged. - Develop the volunteer recruitment coordination program. - Resurrect recruitment coordinator - (Molly for now) to gather a list of simple, small jobs and then match them to a member at each event. Have 3-5 tasks to assign. Communicate to the committees. - Proactively solicit volunteers as they join and at new member breakfast. - Ensure new Board members go to IFMA leader's conference. Use it as an incentive to get involved – let members know that this is a perk of leadership. Use testimonials from those that have been previously. - Evaluate process of welcoming new members. Now, the packets are personally delivered. Plan to incorporate new member breakfast and email touches. CC executive officers on new members emails
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INTERNAL	5. Deliver unique value to members and sponsors.	5a. Engage volunteers with the BSC and develop job responsibilities 5b. More FMs at meetings	5a. BSC drives committee structure and responsibilities by June 2009. 5b. Average number of FMs at meetings increases from X in 2007-08 to X for 2008-09	Champion: Marcia and Molly Accountability: Board Program Committee Volunteer Coordinator	<ul style="list-style-type: none"> - Revitalize membership committee to improve recruitment, retention, succession, strengthen, refocus on our members - Attract more professional members to meetings – offer different times, vary locations, target excellent topics, have recaps at meetings - Promote the new BSC/Plan and solicit comments and ideas. Put it on the web, hand it out at a program and review it. - Have a mechanism (link, form) to volunteer to help. Have the committee volunteer form at every single lunch. Mention it at each meeting. Do a prize drawing.

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INTERNAL	6. Foster a welcoming and sharing culture to inspire innovation, commitment, passion and challenge among chapter volunteers.	6a. Membership retention	6a. Membership retention is at 80% by July 1, 2010.	Champion: Debra and Jackie Accountability: Board Volunteer Coordinator Membership Committee	<ul style="list-style-type: none"> - Develop member profiles – have members fill out a form and indicate their credentials, expertise, interests, skills, etc. - Greeters at each program (Board members and/or Membership committee). Use ribbons again. - Highlight a committee at each meeting – committee chair speaks for a few minutes and invites participation - Show the value of volunteering/the benefits of involvement – testimonials - Ice breaker/networking games to get people talking - Enhance awards program – find new awards to attract more volunteers. Rising star award. New volunteer award. Consider changing up the event.

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FINANCIAL	7. Maintain viable fiscal position through good financial management, diversification of revenues and optimized resource utilization.	7a Plan in place to achieve reserve policy 7b. BSC and budget are aligned 7c. Members report awareness of chapter state.	7a. By November 2008, develop plan to achieve reserve policy (to be approved by the Board in August 08) 7b. By August 2009, BSC drives budget process. 7c. By August 2009, members report high level of awareness of the financial state, membership status and strategic plan.	Champion: Gayle and Dave Accountability: Treasurer and Executive Board	<ul style="list-style-type: none"> - PayPal as a way to streamline payment process. - Chapter financial audit - Develop chapter financial reserves policy - Conduct a financial planning meeting driven by new BSC/strategic plan. - Periodically evaluate financials of each committee – are they spending what they budgeted. Monthly or bi-monthly financial reports. - BOD to discuss the Hospitality Chair position and the process of planning/executing the programs. Need to watch costs carefully – this is a large part of the chapter budget. - Research a chapter debit card or corporate Amex. - Consider a Board members only web site where we can store this information. Electronic files for record retention and succession/board orientation. Create electronic archives.