



FM Roundtable Discussion – October 25, 2016

Strategic Planning for 2017

- President's Message
- Part 1 – 2016 Accomplishments/ Year in Review
 - FM Roundtable – Detail Future Topics
 - Education Committee Summary
 - Membership Committee Summary
 - Program Committee Summary
 - Success Stories – partnerships/connections built within IFMA
- Part 2 – 2017 Plan/Goals
 - FM Roundtable
 - Education Committee Goals
 - Membership Committee Goals
 - Program Committee Goals
 - Other
- Part 3 - Open Discussion

President's Message

- Develop opportunities in education, communication, programs, service, and special events to help the FM's achieve their highest potential.
- Help FM's by:
 - Productivity – Accomplish more with less
 - Effectiveness – Become great leaders
 - "Best" Practices – Identify what has worked well for others
 - Innovation – Find new and creative solutions
 - Optimization – Take the resources you have and make the most out of them.
 - Measuring Results – Better production, better quality, great service
 - Save \$\$\$ - Labor, energy, efficient equipment, prolonged equipment life.

Part 1 - 2016 accomplishments/Year in Review

- FM Roundtable - Detail Future Topics
 - Future Topics

- Facilities Management Systems
 - Asset Management
 - Data Tracking
 - Human Resources/Talent Management
- Program Extraction
 - Education Committee
 - Lease Coordination
 - Project Closeout/FM Systems
 - Contract Negotiations
 - AND More
 - Programs Committee
 - Historic Cruise/Tour Event
 - Effective Meeting Strategies
 - Incorporating AV Systems
 - AND More
- Education Committee Summary - Over 212 people in attendance and over 400 hours of continuing education by members
- Membership Committee Summary
 - SEW total Membership – 209 members as of 9-25-16.
 - Professional – 120
 - Associate – 76
 - Young Professional – 7
 - Lifetime - 4
 - Retired –1
 - Fellow – 1
 - 2016-2017 initiative to get five (5) new professional FM's to join Chapter
 - We created prospecting packets to go out and market IFMA:
 - Professional FM prospect package
 - Office Manager prospect package
 - Associate member prospect packet
- Program Committee Summary - Over 173 people in attendance and over 340 hours of networking
- Communications Committee Summary
 - Rolled out new website in 2015
 - Constantly auditing and enhancing features
 - In conjunction with PR subcommittee, market on Social Media
 - UP NEXT: Forum for our members
- Special Events Committee Summary
 - Beer & Wine Tasting (39 attendees)
 - Brewers Game (40 attendees)
 - Golf Outing (21 sponsors/80 golfers); money raised from Golf Outing funds local scholarships & professional development of Chapter Members

- Other Value Adds
 - Sponsorship newsletter
 - Bring-a-Guest to an event (free or at member cost)
 - Public Relations Committee
 - Greater Committee Interaction
- Success stories - Partnerships/Connections built within IFMA

Part 2 - 2017 Plans/Goals

- FM Roundtables
 - Continue to schedule quarterly FM Roundtables (Q4- to include all members and be strategic planning)
 - If you have suggestions on location, topics, etc please contact me.
 - Continue to extract topics for Programs & Education Committee.
 - Continue to look for other event opportunities. (Historic Tour)
 - Increase attendance (promote- bring a friend)
- Education Committee Goals
 - Establish Calendar of Events (6 planned) for 2017 by end of First Quarter including; all topics were identified in FM Roundtable
 - Time Management/Email Prioritization
 - Real Estate Portfolio Management
 - Virtual Reality
 - Construction Delivery Methods
 - Service Contracts
 - HR/Talent Management
 - Lease Coordination
 - Project Closeout/FM Systems
 - Contract Negotiations
 - Alternative Approaches
 - Potential for a Skype/Webex type meeting
 - Potential for a morning meeting to gauge interest
 - Continue to provide unique facility locations for these events
 - Re-energize CFM, FMP, SFP by gaining corporate interest and adding individuals
- Membership Committee Goals
 - 2016-2017 initiative is to get (5) new Professional FMs to join our Chapter
- Program Committee Goals
 - Goals
 - Continue to coordinate with other committees
 - to provide complimentary programs and social events
 - Increase attendance by offering a variety of programs that are relevant to FM's.

- Continue to provide strong networking opportunities and unique social events to build relationships within SEW IFMA
- Use data and input from members and surveys to develop programs at locations/venues of interest to FM's
- Future 2017 Events
 - Jan. 2017 MillerCoors Green Cleaning Initiative
 - Feb. 2017 Hunzinger virtual design-construction coordination
 - Mar. 2017 JCI Facility Benchmarking-pending confirmation JCI
 - Apr. 2017 Social Mobcraft Brewery-TBD
 - Summer/Fall Historical walk or boat tour-TBD

Part 3 – Open Discussion

- Special Events
 - Golf outing – fewer golfers than years ago; consider partnering with another association to increase attendance; or consider alternating years with a different event that would also raise funds:
 - Fishing
 - Pheasant/trap
 - What do other associations do?
 - Tradeshow – could be a good source to raise funds
- Membership
 - Increase interaction among members
 - More experienced FM's mentoring the Young Professional Group (currently at 7)
 - Reach out to ULine for FM's members
- Education / Certifications
 - Lunch & Learn program on certification testing
 - Promote certifications:
 - Show designations on name badges
 - Make sure WAM uses designations for members
 - Get more involvement for CFM & FMP classes with Madison & Green Bay chapters
 - Hold classes with Madison & Green Bay chapters; rotate onsite for each chapter with others video conferencing
 - Connect w/CBRE, JLL to get commitment for group of their FM's
 - Get more FMP's involved to continue on as CFM's
 - Consider subsidizing costs of designations for members with the Professional Development & Scholarship funds available
- Mentoring Program
 - Outreach to UWM, MSOE students to develop interest in FM career
 - Develop High School FM program for seniors
 - Reach out to Marsha @ UWM
 - STEM is looking for “problems” to solve; IFMA could provide a “problem”
 - AkitaBox currently works w/Brown Deer schools

- Interest from group of Roundtable attendees to spearhead mentoring program
- Strategic Planning
 - Ensure there is continuity through the years
 - WAM needs to assist with continuity
 - Consider having past presidents meet
- Are we trying to do too much?