FM Roundtable Discussion – October 25, 2016

Strategic Planning for 2017

• President’s Message
• Part 1 – 2016 Accomplishments/Year in Review
  o FM Roundtable – Detail Future Topics
  o Education Committee Summary
  o Membership Committee Summary
  o Program Committee Summary
  o Success Stories – partnerships/connections built within IFMA
• Part 2 – 2017 Plan/Goals
  o FM Roundtable
  o Education Committee Goals
  o Membership Committee Goals
  o Program Committee Goals
  o 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:
  o Productivity – Accomplish more with less
  o Effectiveness – Become great leaders
  o “Best” Practices – Identify what has worked well for others
  o Innovation – Find new and creative solutions
  o Optimization – Take the resources you have and make the most out of them.
  o Measuring Results – Better production, better quality, great service
  o Save $$$ - Labor, energy, efficient equipment, prolonged equipment life.

Part 1 - 2016 accomplishments/Year in Review

• FM Roundtable - Detail Future Topics
  o 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
  o Sponsorship newsletter
  o Bring-a-Guest to an event (free or at member cost)
  o Public Relations Committee
  o Greater Committee Interaction
• Success stories - Partnerships/Connections built within IFMA

**Part 2 - 2017 Plans/Goals**

• FM Roundtables
  o 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.
  o Continue to extract topics for Programs & Education Committee.
  o Continue to look for other event opportunities. (Historic Tour)
  o Increase attendance (promote- bring a friend)

• Education Committee Goals
  o 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
  o Alternative Approaches
    ▪ Potential for a Skype/Webex type meeting
    ▪ Potential for a morning meeting to gauge interest
  o Continue to provide unique facility locations for these events
  o Re-energize CFM, FMP, SFP by gaining corporate interest and adding individuals

• Membership Committee Goals
  o 2016-2017 initiative is to get (5) new Professional FMs to join our Chapter

• Program Committee Goals
  o 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?