



**IFMA Foundation BALANCED SCORECARD**

Updated 11.17.2006

| <i>Perspective</i> | <i>Strategic Objectives</i>  | <i>Measures</i>   | <i>Targets</i>  | <i>Accountability</i>   | <i>Initiatives</i>   |
|--------------------|--|---|---|---|--|
| <b>STAKEHOLDER</b> | 1. Provide scholarships/grants to meet career-development needs of practitioners and to advance the profession | 1.1 Number of annual scholarships and grants given<br><br>1.2 Total monetary value of scholarships and grants given<br><br>1.3 Number of annual scholarship and grant applications<br><br>1.4 Accountability – how many initiatives are met | 1.1 Award +/- 30 scholarships and +/- 10 grants annually<br><br>1.2 Award +/- \$50,000 in scholarships and +/- \$10,000 in grants annually<br><br>1.3 Receive +/- 100 scholarship applications and +/- 30 grant applications annually | Foundation Trustees<br><br>IFMA President/CEO<br><br>Foundation Executive Director<br><br>Foundation KM Chair | 1. 1.1, 1.2, 1.3 Develop and implement a plan to put Foundation scholarship information in the hands of every student pursuing a degree in FM<br><br>2. 1.1, 1.2 Actively seek global diversity among Foundation scholarship and grant recipients<br><br>3. 1.x Expand publicity for those receiving Foundation scholarships by working closer with sponsoring companies |

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| <b>STAKEHOLDER</b>        | <p>2. Promote research and education in the following areas that will advance the FM profession:</p> <ul style="list-style-type: none"> <li>• Career/education focused</li> <li>• Issues with long term perspectives</li> <li>• White papers</li> <li>• Experimental research</li> </ul> | <p>2.1 Number of research projects launched and funded</p> <p>2.2 Cumulative value or impact of directly or indirectly sponsored research and educational initiatives</p> | <p>2.1a Complete 2 directly-sponsored research projects or educational initiatives (LEED-EB, wireless technology, pandemic flu) annually</p> <p>2.1b Fund 1 indirectly-sponsored research project or educational initiative annually</p> <p>2.2a Achieve a favorable rating in opinion survey of FM stakeholders</p> <p>2.2b Have the Foundation's work recognized by at least one outside authority</p> <p>2.3 Initiate a juried publication</p> | <p>Foundation Trustees</p> <p>IFMA President/CEO</p> <p>Foundation Executive Director</p> <p>Foundation KM Chair</p> | <ol style="list-style-type: none"> <li>1. 2.1a Identify at least 2 outside entities to fully fund a minimum of one joint research project annually</li> <li>2. 2.1b Create an annual campaign to solicit project ideas and funding for research and educational initiatives. Add a feature to the Foundation Web site to encourage the submittal of research ideas</li> <li>3. 2.2a Launch a campaign directed at key internal and FM publications to drive home all the good works the Foundation does to support FM</li> <li>4. 2.2b Target outside authorities (institutes, media, think tanks, etc.) who may be interested in receiving Foundation research or in publicizing its availability</li> <li>5. 2.3 Roll out a juried publication at WWP 2007 or EFMC in 2008</li> </ol> |

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| <b>STAKEHOLDER</b> | 3. Advance the stature and influence of the Foundation | <p>3.1 Reach of public relations and communications efforts</p> <p>3.2 Build reputation with close and distant constituents (IFMA members, FM non-members, donors, scholarship sponsors, other foundations, grantors, etc.)</p> <p>3.3 Leverage and enhance effectiveness of strategic collaborations</p> <p>3.4 Grow number of Foundation supporters</p> | <p>3.1a Achieve 5 million positive press impressions and 1 national media coverage</p> <p>3.1b Increase traffic to the Foundation Web site by 50 percent</p> <p>3.2a Increase awareness among key constituents on the importance of supporting and advancing FM research and educational initiatives</p> <p>3.2b Query key constituents via surveys, interviews and focus groups</p> <p>3.3 Increase number and variety of activities with strategic partners (those entities that we share a common mission or goal with for the betterment of the work place, LEED, technology, productivity etc.)</p> <p>3.4 Growth in number of supporters from X to X by end of calendar year 2007</p> | <p>Foundation Trustees</p> <p>IFMA President/CEO</p> <p>Foundation Executive Director</p> <p>IFMA VP Communications</p> <p>IFMA Director Allied Services</p> <p>Marketing General</p> <p>Foundation Marketing Chair</p> | <ol style="list-style-type: none"> <li>1. 3.1a, b Complete public relations and marketing plans</li> <li>2. 3.1b Redesign the IFMA Web site to be more dynamic and worthwhile for the viewer</li> <li>3. 3.2a ,b Develop and implement a number of outreach initiatives to key constituents</li> <li>4. 3.3 Develop plan to drive interaction with new and existing supporters</li> <li>5. 3.3 Define who our strategic partners are</li> <li>6. 3.4 Launch an advertising campaign seeking support of Foundation initiatives among IFMA members and FMJ readers.</li> <li>7. 3.4 Launch aggressive solicitation campaign for key constituents, including IFMA chapters/councils (and scholarship recipients?)</li> </ol> |

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| <b>OPERATIONAL EXCELLENCE</b> | 4. Optimally and efficiently deliver Foundation products and services | 4.1 Efficient use of information technology<br>4.2 Productive work environment<br>4.3 Establish appropriate staffing level<br>4.4 Time to process contributor transactions | 4.1 Explore efficiencies that can be gained from technology investments<br>4.2 Understand level of effectiveness of current work environment<br>4.3 Monitor staffing levels<br>4.4 Reduce processing time by 25 percent (from receipt of funds to acknowledgment letter) | Foundation Trustees<br><br>IFMA President/CEO<br><br>Foundation Executive Director<br><br>IFMA VP Membership and Administration<br><br>IFMA Director Allied Services<br><br>Dyonyx (association's IT service provider) | 1. 4.1 Explore donor management software or iMIS modules that can manage, prioritize and schedule donors for solicitations<br><br>2. 4.2 Match staffing needs to potential outcomes |

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| <b>PEOPLE</b><br><i>(Learning and Growth)</i> | 5. Provide exceptional volunteer and staff experiences that are rich and meaningful for both and advance the work and mission of the Foundation | 5.1 Provide excellent volunteer training (trustees) and leadership experiences<br><br>5.2 Motivate individuals to become committed and involved<br><br>5.3 Evaluate trustee experience and satisfaction levels<br><br>5.4 Provide opportunities for staff to enhance roles and develop skills<br><br>5.5 Capture training, best practices and BOT knowledge – document on extranet | 5.1 Achieve a high rating on leaders' and trustees' evaluations of Foundation staff and headquarters support<br><br>5.2 Achieve a high rating on member satisfaction among chapter/council leaders who provide scholarships or do fundraising<br><br>5.3 Establish an appropriate staff development plan and budget<br><br>5.5 Train BOT on effective use of extranet | Foundation Trustees<br><br>IFMA President/CEO<br><br>Foundation Executive Director<br><br>IFMA Senior Management Team<br><br>Foundation Finance Chair | 1. 5.1 Refocus and align resources to volunteer needs based upon survey results and strategic plan<br><br>2. 5.2 Develop a process or system for engaging and recruiting IFMA stakeholders to become Foundation trustees or champions of Foundation pursuits<br><br>3. 5.3 Develop a mentoring program for trustees<br><br>4. 5.4 Seek global diversity when recruiting trustees<br><br>5. 5.5 Create a staffing and training plan |

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| <b>FINANCIAL</b>   | 6. Demonstrate excellent stewardship of financial resources by securing, managing and expanding sources of revenue | <p>6.1 Alignment of budget with strategic planning documents</p> <p>6.2 Rate of return for monies invested</p> <p>6.3 Size of total asset base</p> <p>6.4 Revenue diversity</p> <p>6.5 Corporate involvement</p> <p>6.6 Foundation grants</p> <p>6.7 Member's Choice support</p> <p>6.8 Involvement of Foundation scholarship recipients</p> | <p>6.1a Completion of alignment</p> <p>6.1b Achieve an Expense to Program ratio of 75/25 by 2011</p> <p>6.2 Achieve rates of return on money invested to target of 3% points above inflation factor when evaluated on a 3-5 yr basis</p> <p>6.3 Increase unrestricted assets to one million dollars by 2011</p> <p>6.4a Add a minimum of one new revenue stream in 2007 and one more in 2008</p> <p>6.5 Add 5 new corporate contributors by the end of 2008</p> <p>6.6 Pursue two foundation grants in 2007 for a minimum of \$25,000 and obtain at least one grant by 2008</p> <p>6.7 Achieve 50% participation by 2010 from Foundation check-off on IFMA membership renewals (2006 participation rate is approximately 33 percent)</p> | <p>Foundation Trustees</p> <p>IFMA President/CEO</p> <p>Foundation Executive Director</p> <p>UBS Financial Services</p> <p>Marketing General Inc.</p> | <ol style="list-style-type: none"> <li>1. 6.x Determine long range growth strategy and evaluate best use of financial resources</li> <li>2. 6.2 Manage investments following the Foundation's investment policies to achieve desired ROIs</li> <li>3. 6.3 Develop and implement a plan to increase the unrestricted asset base to \$1,000,000 by 2011</li> <li>4. 6.4a Develop a plan to add at least two new revenue sources by 2008</li> <li>5. 6.4b Create a campaign to encourage donations from IFMA, Foundation and FM stakeholders who previously have not contributed</li> <li>6. 6.5 Work with IFMA's Corp Development to identify and pursue prospects</li> <li>7. 6.5, 6.6 Identify and pursue foundations of IFMA Corporate Sustaining Partners</li> <li>8. 6.6 Develop and implement a grant-writing plan<br/>6.7 Strengthen Foundation solicitation on IFMA membership renewal forms showing benefits of contributing and follow up each donation with a timely thank you</li> </ol> |

