

2009 - 2010 BALANCED SCORECARD

Updated July 15, 2009

Perspective	Strategic Objectives	Measures	Targets	Accountability	Initiatives
STAKEHOLDER	1. Provide scholarships/grants to meet career-development needs of practitioners potential FMers and to advance the profession	1.1 Number of annual scholarships and grants given 1.2 Total monetary value of scholarships and grants given 1.3 Number of annual scholarship and grant applications 1.4 Student Awards & Recognition programs	1.1 Award +/- 25 scholarships and +/- 10 grants annually 1.2 Award +/- \$62,500 in scholarships and +/- \$10,000 in grants annually 1.3 Receive +/- 60 scholarship applications and +/- 20 grant applications annually 1.4 Award International Student of the Year, Poster Winner and Student Genius competition winners	IFMA President/CEO Executive Director Foundation KM Chair Director, Academic Affairs Foundation EC & Trustees	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 or related fields supporting the Built Environment 2. 1.1, 1.2 Develop a plan to actively seek global diversity among Foundation scholarship and grant recipients 3. 1.1,1.2 Expand publicity for those receiving Foundation scholarships by working closer with sponsoring companies, accredited degree programs, and the Built Environment community 4. 1.1, 1.2 Increase dollar value of individual scholarships 5. 1.4 Formalize International Student of the Year Award program. 6. 1.4 Execute, Judge and award Student Poster & Genius competitions.

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STAKEHOLDER	<p>2.a Oversee the Accredited Degree Program in order to advance the FM profession and contribute to a more productive and sustainable Built Environment.</p> <p>2.b Promote education and research in areas that will advance the FM profession</p>	<p>2.1a Sustain and grow FM higher education</p> <p>2.2a Revise ADP standard to accredit associate, bachelors, and master's degrees.</p> <p>2.3a Achieve recognition from CHEA as a recognized accrediting body</p> <p>2.4a Develop a program to introduce FM career opportunities to high school students and counselors</p> <p>2.5a Develop a vehicle for Chapters and Councils to adopt an FM higher education program</p> <p>2.1.b Initiate a juried publication</p> <p>2.2b Publish a minimum of 2 Research papers Annually</p> <p>2.3b Develop & maintain an American Education Directory</p> <p>2.4b Advance FMpedia as knowledge tool</p>	<p>2.1a Through re-accreditation and "adopt a FM program" maintain FM programs at all schools already accredited or those who become accredited</p> <p>2.1b Grow number of accredited programs globally to 18 by 2011 and 25 by 2015.</p> <p>2.1c Influence the initiation of FM programs in higher institutions in the following US states: CA-2011, FL-2011, IL-2011, VA/MD/DC-2011, OH-2012, NJ-2012, MC-2012</p> <p>2.2a Revise the present ADP standard to accredit FM programs in high education institutions at all degree levels except doctorate -03/2010</p> <p>2.2b Foundation Trustee approval 04-2010</p> <p>2.3a Seek eligibility as a recognized accrediting body by CHEA – 07/2010</p> <p>2.3b If eligibility is granted apply to be a CHEA recognized accrediting body 07/2010</p> <p>2.4a Develop a pilot program for providing FM career information to students and counselors – 09/2010</p> <p>2.4b Evaluate pilot program in 2.3a, revise and implement resultant initiative 09/2011</p> <p>2.5a Work with Chapter and Council leaders to develop a program to adopt a FM higher education institution 01/2011</p>	<p>Director, Academic Affairs</p> <p>IFMA President/CEO</p> <p>IFMA Foundation EC & Trustees</p> <p>Executive Director</p>	<ol style="list-style-type: none"> 1. 2.1a Maintain ADP programs 2. 2.1b Grow ADP programs 3. 2.1c Influence the initiation of new FM higher education programs 4. 2.2a&b Revise and adopt ADP standard 5. 2.3a&b Become a CHEA recognized accrediting body 6. 2.4a&b Develop a high school, or equivalent, FM career opportunities program 7. 2.5a Create a program for Chapters and Councils to adopt FM higher education institutions. 8. 2.1b Launch Juried Publication 9. 2.2b Publish a minimum of two Research papers: <ul style="list-style-type: none"> • Sustainability Guides • Cut it Out • 2nd Edition Green Cleaning and/or Office Churn 10. 2.3b Publish first American FM Directory, On-line 11. 2.4b Develop plan for FMpedia advancement and funding.

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STAKEHOLDER	3. Advance the stature and influence of the Foundation	<p>3.1 Develop and implement a clear and comprehensive marketing strategy</p> <p>3.2 Expand the reach of public relations and communications efforts</p> <p>3.3 Build reputation with close and distant constituents (IFMA members, FM non-members, donors, scholarship sponsors, other foundations, grantors, etc.)</p> <p>3.4 Leverage and enhance effectiveness of strategic collaborations</p> <p>3.5 Grow number of Foundation supporters</p> <p>3.6 Expand marketing effort to better reach young leaders & professionals.</p>	<p>3.3a Increase awareness among key constituents on the importance of supporting and advancing FM education, research and scholarship initiatives</p> <p>3.3b Query key constituents</p> <p>3.4 Increase number of liaisons and variety of activities with allied industry bodies (those entities that we share a common mission or goal with for the enhancement of the Built Environment - BOMA, FMA Australia, MELT FM, BIFM, EuroFM, GlobalFM, SAFMA, FMANZ, KFMA, TEFMA, RICS, PCA, etc.) Target 10 reciprocal web links on our site by 06/2010</p> <p>3.5 Growth in number of supporters (sponsors over \$1,000) from 38 to 80 by end of calendar year 2010</p> <p>3.6 Develop Social Media channels</p>	<p>IFMA Foundation EC & Trustees</p> <p>IFMA President/CEO</p> <p>Executive Director</p> <p>IFMA VP Communications</p> <p>IFMA Assoc Dir of Marketing</p> <p>Foundation Fundraising and Marketing Chair</p>	<ol style="list-style-type: none"> 1. Develop marketing plan to drive interaction with new and existing supporters. Conduct an audit and prepare a register of marketing collateral versus current and future needs. 2. Develop a repeatable and consistent Foundation story. 3. Continue building brand awareness through consistent graphics and increased exposure (Booth, pin, brochure, etc). 4. Develop format for Annual Performance Report 5. Develop vibrant Liaison/Ambassador program 6. Enhance the IFMA Foundation Web site and IFMA Foundation marketing materials to be more dynamic and worthwhile for the viewer 7. Develop and implement a number of outreach initiatives to key constituents (e.g. survey, interviews, focus groups) 8. Define key strategic partners (domestic and international organizations) 9. 3.5 Launch campaign for key constituents, including IFMA chapters/councils, scholarship and grant recipients, FIBs & Fellows, Research Underwriters, Corporate Donors, etc., through Event, General and other creative Fundraising plans, including "Rock the Foundation" into a sustainable annual focus event. 10. 3.6 Launch Facebook & Twitter pages. Promote LinkedIn. Plan YouTube video.

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OPERATIONAL EXCELLENCE	4. Efficiently deliver professional quality Foundation products and services	4.1 Efficient use of information technology 4.2 Productive work environment 4.3 Establish appropriate staffing levels 4.5 Maintain bylaws and operating policies and procedures 4.6 Improve Trustee communications and interactions with enhanced feedback and approvals.	4.1 Explore efficiencies that can be gained from greater utilization or training with regard to existing technology investments and assets 4.2 Understand level of effectiveness of current work environment, programs and products. 4.3 Monitor staffing levels 4.5 Perform bi-annual reviews to sustain current & accessible documentation 4.6 Improved coordination and resource allocation to support objectives.	Foundation EC & Trustees IFMA President/CEO Executive Director IFMA VP Administration Past Chair – IFMA Foundation	1. Conduct an audit and prepare a register of current operational assets versus current and future needs. 2. 4.2a Match staffing needs to potential outcomes 3. 4.2b Expand and support the Liaison/Ambassador Program to achieve better geographical coverage. 4. 4.2c Formalize process for evaluating effectiveness of programs and products delivered (feedback, surveys, debriefs, etc., with goal of continuous process improvement 5. Update Foundation Bylaws, policies, and procedures 6. Develop an “integrated communications chart” to clarify how the Trustees obtain feedback and seek approval.

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<p>PEOPLE <i>(Learning and Growth)</i></p>	<p>5. Provide exceptional volunteer and staff experiences that are rich and meaningful for both and advance the work and mission of the Foundation</p>	<p>5.1 Provide excellent volunteer training platform and leadership experiences for Trustees</p> <p>5.2 Establish Trustee expectation and standards</p> <p>5.3 Motivate individuals to become committed and involved</p> <p>5.4 Evaluate Trustee experience and satisfaction levels</p> <p>5.5 Provide opportunities for staff to enhance roles and develop skills</p> <p>5.6 Capture training, best practices and BOT knowledge – document on extranet</p>	<p>5.1 Achieve a high rating on leaders' and Trustees' evaluations of Foundation staff and headquarters support</p> <p>5.2 Achieve a high rating on member satisfaction among chapter/council leaders who provide scholarships or do fundraising</p> <p>5.3 Establish an appropriate staff development plan and budget</p> <p>5.4 Train BOT on effective use of extranet</p> <p>5.5 Maintain succession plan matrix including current board strengths & weaknesses</p>	<p>Foundation EC & Trustees</p> <p>IFMA President/CEO</p> <p>Executive Director</p> <p>IFMA Senior Management Team</p> <p>Foundation Chair</p> <p>Foundation Finance Chair</p> <p>Past Chair – IFMA Foundation</p>	<p>1. 5.1 Maintain a succession plan matrix that includes evaluating current board strengths and weaknesses and matches needs with available candidates skill sets, interests, and ability to align to Foundation's strategic plan.</p> <p>2. 5.4 Develop a new Trustee orientation and ongoing mentoring program</p> <p>3. 5.5 Seek global diversity when recruiting Trustees</p> <p>4. 5.5b Implement BOT meeting survey to gain feedback on meeting content, experience, and usefulness.</p>

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FINANCIAL	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. Plan to balance budget to cover fixed expense requirements.</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 Member's Choice support</p> <p>6.7 Sale of KM products, books, papers, etc.</p> <p>6.8 Involvement of Foundation scholarship recipients</p>	<p>6.1a Completion of alignment - ongoing</p> <p>6.1b Achieve an Expense to Program ratio of 80/20 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 temporarily & unrestricted assets to one million dollars by 2015</p> <p>6.4a Add a minimum of one (1) new revenue stream in 2009 and one more in 2010 to enhance existing revenue stream</p> <p>6.4b Update funding/donation matrix</p> <p>6.5 Add five (5) new corporate contributors (minimum of \$10k) by the end of 2010</p> <p>6.7 Achieve 40% participation by 2010 from Foundation check-off on IFMA membership renewals</p>	<p>Foundation EC & Trustees</p> <p>IFMA President/CEO</p> <p>Executive Director</p> <p>Director, Academic Affairs</p> <p>Foundation Chair</p> <p>Foundation Finance Chair</p> <p>Investment Advisor</p> <p>IFMA Assoc Dir of Marketing</p> <p>Foundation Marketing / Fundraising Chair</p>	<ol style="list-style-type: none"> 6.1 Determine long range growth strategy and evaluate best use of financial resources 6.2 Manage investments following the Foundation's investment policies to achieve desired ROIs 6.3 Develop and implement a plan to increase the temporarily & unrestricted asset base to \$1,000,000 by 2015 6.4a Develop a plan to add at least two new revenue sources by 2010 6.4b Create a campaign to encourage donations from IFMA, Foundation, Corporate, and FM stakeholders who previously have not contributed 6.5 Work with IFMA's Corp Development to identify and pursue prospects 6.6 Identify and pursue foundations of IFMA Corporate Sustaining Partners