



Strategic & Operations Plan

2008/2009 Status Report
2009/2010 Plan

September 9, 2009

Overview

Progress has been made on all four of the key Council Goals for the period of October 2008 until August 2009. The details below show the progress and remaining work to do on each goal.

A new set of goals will be created that leverages on the progress and sets some new directions for the Council in the FY of 2009/2010, ending June 30, 2010.

Status Report - 2008/2009 (Fiscal Year ending June 30, 2009)

Goal 1

Support and advance the visibility, value and impact of the FM consulting community.
(Stakeholder Perspective)

Objectives:

1. Provide effective networking opportunities for all facility management CC stakeholders.
2. Promote the FM consulting profession
3. Quantify the value of FM consultants
4. Build a FM Consultants community

Results:

- ✓ Resource Directory up and running, albeit not well populated at present.
- ✓ Our Best Practices have been produced as webinars – four to date.
- ✓ Member presentation and events where they participated are shown on the website.
- ✓ WWP visibility was high in Dallas and will continue in Orlando.
- ✓ We did not make a formal effort to gain WWP submittals, but there were several members who presented in Dallas.



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Goal 2

Manage the council to foster professional development growth, enhance benefits, and propagate the FM consulting profession. (Stakeholder Perspective)

Objectives:

1. Establish a solid succession planning process for leaders.
2. Modify monthly Board meetings – the agenda to focus on plans, successes, and goal adjustments, and minimize “administrivia” by using written reports and consent agenda items
3. Populate the practice/geography table
4. Utilize the annual meeting at WWP as a forum to evaluate the progress of, and to make adjustments to, the Strategic Plan

Results:

- ✓ Leader succession plan is in place and was modified due to real-time circumstances.
- ✓ Board meetings are well focused – need to assure follow up on action items.
- ✓ Demographics table was done once or twice, but needs to be updated and evaluated quarterly.
- ✓ Updated members attending WWP Dallas on Strategic Plan progress.

Goal 3

Instill a passion for excellence in our Global members through educational and professional opportunities, mentoring, knowledge, and leadership development. (People Perspective)

Objectives:

1. Provide professional development tools, information, opportunities for membership (Trends, cutting edge)
2. Provide exceptional volunteer experiences that are rich and meaningful for the volunteers and advance the work of the council.
3. Provide volunteers with the resources and support that enables them to excel while achieving the council mission.

Results:

- ✓ Our global geographic focus shows up on the Board Conf Call agendas, in our webinars and in attendance at WWP 2008 in Dallas.



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- ✓ Webinars have been presented live in N.A. to date, although they are viewable on-line by any member.
- ✓ Articles have not been posted, but references to them have been.
- ✓ Mentoring has occurred in an informal manner.
- ✓ Our face-to-face and on-line balance seems to be about right. We did not formally attend the 2009 Spring Meeting, but several members were presenting and thus we had a presence.
- ✓ The Community Server tool is being widely used and seems to be effective.

Goal 4

Engender fiscal responsibility in the council that serves its immediate needs, while adequately planning for the future. (Operational Perspective)

Objectives:

1. Maintain viable fiscal position through good financial management, diversification of revenues and optimized asset utilization.
2. Provide fiscal responsibility by creating reserve funding for council continuance.

Results:

- ✓ Active management of expenses kept the 08/09 budget adequately balanced. Adjustments made to the 09/10 budget.
- ✓ We did not have any "revenue events" in 08/09.
- ✓ Donation was made to the Foundation at WWP Dallas. Also planning to do so at WWP 2009.

Strategic and Operational Goals for 2009/2010 (Fiscal Year ending June 30, 2010)

Goal 1

Support and advance the visibility, value and impact of the FM Consulting Community.

Objectives:

1. Increase members listed on the Resource Directory to 100 or more by end of 2009, and by 200 or more by the end of the FY, June 30, 2010.



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2. Increase the number of references to new member's articles and presentations to a total of 25/year.
3. Investigate PR opportunities with IFMA staff to show the benefits and success stories of our members.
4. Continue the WWP presence with a booth, programs and extensive networking and recruiting activities.

Goal 2

Provide a variety of professional development programs throughout the globe to grow our membership and to support the changing needs of members.

Objectives:

1. Institute the Toolkit catalog by 12/1/09. Create a usage methodology to know how many are using the tools. Set a usage metric on 3/1/2010 for measuring adequate use by members.
2. Produce "consulting operational webinars" at an annual rate of 3-4/year.
3. Work with the EMEA global liaison and others to evaluate the member growth opportunities and then set a goal for increasing membership.
4. Recruit a Global Liaison for Asia Pacific by 12/1/09.
5. Utilize our website calendar to show seminars and conferences of interest to FM consultants.

Goal 3

Maintain the operational effectiveness and fiscal management.

Objectives:

1. Review the budget monthly and make real-time changes to assure the income/expense is balanced at year-end.
2. Get at least 2 sponsors for the Council by 2/1/10
3. Utilize more meeting technology where effective – web conference calls for Board meetings, on-line file collaboration, and possibly RSS feeds of useful information to our members.
4. Adopt a strategy on the need and use of social networking tools adopted by IFMA.