



Chapter Operations Manual

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Chapter Operations Manual

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Foreword

Congratulations on accepting the responsibility of directing a chapter of the International Facility Management Association. It takes a special person to dedicate his or her time and talent to the achievement of common IFMA goals.

Strong professional associations are vital to the development of every profession. IFMA's vision is to serve as the resource and representative for facility management and its mission is to provide exceptional products, services and opportunities that support and advance the facility management profession.

IFMA Chapters are run by volunteers and the following story written by noted author Erma Bombeck emphasizes the importance of volunteerism.

"I had a dream the other night that every volunteer in this land had set sail for another country. I stood smiling on the pier, shouting, "Goodbye, phone committees. Goodbye, disease of the months. No more getting out the vote. No more playground duty, bake sales, and three-hour meetings."

As the boat got smaller, I reflected: "Serves them right, that bunch of "yes" people. All they had to do was put their tongues firmly against the roofs of their mouths and make an 'o' sound...no. It would certainly have spared them a lot of grief. Oh, well, who needs them?"

The hospital was quiet as I passed it. The reception desk was vacant. Rooms were devoid of books, flowers, and voices. The children's wing held no clowns, no laughter. The home for the aged was like a tomb. The blind listened for a voice that never came. The infirm were imprisoned on wheelchairs that never moved. Food grew cold on trays that would never reach the hungry.

The social agencies had closed their doors unable to implement their programs of scouting, recreation, drug control; unable to help the retarded, crippled, lonely, and abandoned. Health agencies had signs in their windows: "Cures for cancer, birth defects, multiple sclerosis, heart disease, etc., have been canceled because of lack of interest."

The schools were strangely quiet, with no field trips and no volunteer classroom aides. Symphony Hall and the museums that had been built and stocked by volunteers were dark and would remain that way.

The flowers on the church altars withered and died. Children in day nurseries lifted their arms, but there was no one to hold them in love. Alcoholics cried out in despair, but no one answered. The poor had no recourse for health care and legal aid.

I fought in my sleep to regain a glimpse of the ship of volunteers just one more time. It was to be my last glimpse of a decent civilization." (Reprinted from the Chicago Sun Times, 1976)

This Chapter Operations Manual is designed to guide you, your fellow leaders and your members in all areas of chapter management. In addition, the manual provides important background information about IFMA, its mission, goals, benefits and services . . . information vital to your members of which you, as a leader, should be aware. Please take the time to review this manual. It is organized in an easy-to-follow format and will be your most useful reference in day-to-day chapter operations as well as in planning special events.

Chapters can add value to the IFMA membership experience. As a leader, it is your privilege and your responsibility to see that your chapter communicates effectively with its members, ensuring that the value is received and appreciated.

For planning and implementation purposes, please copy and distribute appropriate sections to your officers and committee members. This manual, combined with the online Chapter & Council Resources available at www.ifma.org, and your Components staff will help assist in your chapter's success.



Overview of the International Facility Management Association

Section 1

A Profile of the International Facility Management Association

General

IFMA is an association dedicated to providing support to facility management professionals through programs in career development, education and research. Founded in 1980, IFMA has steadily grown with the profession. Today IFMA boasts a global membership with members in 60 countries, 131 chapters and 17 councils.

IFMA's Purpose:

IFMA is a member-centric association that exists to guide and develop facility management professionals by providing exceptional services, products, resources and opportunities. In support of its members, IFMA promotes the facility management profession through education, credentialing, government relations, leadership opportunities, publishing, recognizing excellence, research and standards development.

Core Values

IFMA pledges to live the following core values through its role and responsibilities to stakeholders:

Collaboration

We believe that working together toward a common goal is essential to the success of the association.

Communication

We encourage open and frequent dialogue among IFMA staff and the facility management community focused on active listening and earnest response.

Conscientiousness

IFMA staff members are not only guided by the strategy and values, but are also guided by their own conscience and adhere to a disciplined set of personal principles.

Excellence

We recognize the importance of excellence in ourselves and to the association. We develop and deliver information, products and services to standards of the highest quality.

Innovation

We encourage innovation to improve all the ways in which the association pursues its mission.

Integrity

We uphold honesty, ethical practices and environmental responsibility in our involvement with staff, facility management practitioners, business partners, and facility and industry issues.

Knowledge Sharing

We encourage knowledge sharing as a result of our belief that all of us are smarter and more productive than any one of us.

Leadership

We inspire each other to achieve and grow through a shared vision and passion to excel.

Professional Development

We support the development of our people, association and profession through positive relationships, dynamic synergies and innovative growth opportunities.

Recognition

We recognize and celebrate the accomplishments of our people, the association's greatest asset.

Stewardship

We understand that we are stewards of the facility management profession and the resources entrusted to the association by its members.

- See more at: <http://www.ifma.org/about/strategic-plan/core-values#sthash.ijXMFopH.dpuf>.

IFMA's Vision:

Serve as the resource and representative for facility management.

IFMA's Mission:

Advance the facility management profession.

IFMA's Goals

- 1). Continuously improve opportunities to expand and leverage stakeholders collective knowledge and experience. *(Stakeholder Perspective)*
- 2). Provide essentials for facility management professionals to advance their careers. *(Stakeholder Perspective)*
- 3). Magnify the importance of facility management worldwide. *(Stakeholder Perspective)*
- 4) Optimize governance, systems, alignment and lean processes. *(Internal Perspective)*
- 5.) Deliver exceptional value to stakeholders. *(Internal Perspective)*
- 6.) Foster a culture that instills innovation, passion, challenge and meaning among stakeholders. *(Learning and Growth Perspective)*
- 7.) Exercise strong fiduciary responsibility. *(Financial Perspective)*

VISION

Serve as the resource and representative for facility management.

MISSION

Advance the facility management profession.

PURPOSE

IFMA is a member-centric association that exists to guide and develop facility management professionals by providing exceptional services, products, resources and opportunities. In support of its members, IFMA promotes the facility management profession through education, credentialing, government relations, leadership opportunities, publishing, recognizing excellence, research and standards development.

ABOUT THE STRATEGIC PLAN

The strategic plan was developed to provide both IFMA volunteers and staff a clear and common direction as they pursued endeavors to benefit the association, its members and the profession as a whole. When IFMA first began work on the strategic plan, it took a broad look at the needs of the profession and discussed what the association could do in a more far-reaching way to accommodate those needs.

IFMA made a commitment—not only to its members, but to the entire facility management community—to support, represent and advance facility management. As the process is revisited each year, it becomes more refined, targeted and focused on the goals and objectives IFMA has pledged to carry out for the benefit of its members.

Every initiative IFMA undertakes—from promoting the association to providing educational, networking and informational resources to membership—is directly related to the goals and objectives outlined in the strategic plan. As the board identifies changes and trends impacting the profession, IFMA staff responds by developing resources that enhance the value of the association to all segments of the facility management community.

- See more at: <http://www.ifma.org/about/strategic-plan/strategy-map>

The Members

The association's members, represented in 131 chapters and 17 councils worldwide, manage more than 37 billion square feet of property and annually purchase more than US\$100 billion in products and services.

The vast majority of IFMA members serve multi-function roles for their employers. These roles include, but are not limited to: maintenance and operations; administrative services; space management; architectural and engineering services; real estate, facility planning; financial planning; and health and safety. They also increasingly must do more with less in-house staff.

A History of IFMA

The average person did not know what facility management was in 1980. Even the average facility manager did not appreciate that he or she was part of a real profession because there was little consistency in job titles or descriptions. They usually were called property managers, building managers or office administrators. And, there was no organized effort to unite this diverse group.

“People would ask me what I did, I would say I was a facility manager,” Bill Back, then with Texas Eastern Transmission Corp. headquartered in Houston, Texas, USA, said. “‘Facility manager, what’s that?’ was the usual response.” Back described his role as doing about 10 times as much as a building manager.

Office environments were on the verge of change. The popular 1960s freestanding screens were being replaced with sophisticated systems furniture. The introduction of the computer terminal into workstations also presented challenges with computer, wiring, lighting, acoustic and territory problems. The office scene was becoming more complex, and the person in charge, a.k.a. the facility manager, needed guidance. Faced with his company’s growing pains and the demands of workplace evolution, George Graves wondered how he could improve his stature at Texas Eastern Transmission Corporation.

“At that time, there was no other association that addressed facility management,” Graves said. “The closest thing to it was an association interested in buildings and their leases, while we were challenged with that plus office layout, budgets and long-range forecasting just to name a few issues.”

A group of practitioners set out to achieve recognition and credibility for their profession, make facility management a household word. Today, their dream has become a reality through the International Facility Management Association, and the FM title now is recognized by industry colleagues, academia and top management across the world.

December 1978 marked one of the first gatherings. Robert Probst of Herman Miller Research Corp. hosted a conference entitled “Facility Influence on Productivity” at Herman Miller’s Merigold Lodge in Holland, Mich., USA. Probst’s goal for the conference, according to Graves, was to “bring people like us together.” Probst wanted to establish Facility Management Institute to be an educational and research subsidiary of Herman Miller.

Three important figures were introduced during the conference. They were Graves, who would become IFMA’s first president; Charles Hitch, then with the Manufacturers Bank of Detroit; and Dave Armstrong, a professor at Michigan State University who would eventually head FMI. They voiced the need for an organization that was not promoted by vendors, but was made up of facility managers from private industry. While these men would plant the seeds to form IFMA, nothing took root at this meeting.

Nearly a year later, Graves and Hitch hosted a conference for facility management professionals at the Renaissance Center in Detroit, Mich., USA. Armstrong was in

attendance to discuss the objectives of the new FMI. Despite hopes that this meeting would lead to the foundation of a

private-sector organization dedicated to facility management, the conference adjourned with nothing settled.

“I think the organization didn’t materialize in Detroit because we didn’t have the groundwork laid for it,” Graves said. “All we did was get together and talk about it. No concrete steps were taken though everyone there was in favor of it.”

Progress finally was made May 1980, when Graves hosted a two-day meeting at Two Houston Center in Houston, Texas, USA to develop the framework for a facility management association. By the end of that meeting, a new organization—the National Facility Management Association—had a constitution and bylaws, temporary offices and an expansion plan. In the following months, Graves served as president, Hitch as vice-president, Bill Back as secretary and Charles White of Houston Natural Gas as treasurer.

Other people in attendance at the founding were: Judy Farrar of the American Productivity Center; A. C. Brooks of Shell Oil Company; Suzanne Huston of Western Company of North America; Wayne Mills of Pennzoil Company; Andy Pedrazas of Columbia Gulf Transmission; Douglas Sherman of the University of Michigan; and Melvin Schlitt and Robert Snyder, both of Facility Management Institute.

“I think one of the things that helped us expand during our first few months was the fact that Mel and Bob had both been at the meeting in Houston,” Back said. “They went back to FMI and started to conduct two seminars per week. Fortunately, they became our pitchmen. They had people attending those seminars from all around the country, and they made a pitch for the Association every time. That’s when we really started picking up a lot of members.”

FMI was very interested in the new Association, according to Graves, and it agreed to help by offering part-time manpower, donating public relations services, creating a budget and hosting the first annual conference of the National Facility Management Association in Ann Arbor, Mich., USA.

There were 47 participants, 25 of which were members of the Association, at this conference in October 1980. Most of the participants also had attended a seminar held by FMI two days prior to the meeting. The NFMA event was conducted for another two days and included presentations on facility management as well as important business affairs like ratification of the constitution and election of officers. The new officers were: Charles Hitch, president; Richard Arick of Lincoln Life Insurance, vice president; Charles White, treasurer; and Judy Farrar of American Productivity Center, secretary. During that meeting, members present from Houston made a commitment to establish the first local chapter and to host the second annual conference there in October 1981.

“It was [to be] the Association’s first conference which was actually administered by its members,” Back said. “The conference in Ann Arbor was staged primarily by FMI with our name on it. I was pretty scared, my chapter was responsible for the conference in

Houston and, at that time, the Association was not even incorporated. Consequently, if we had not been able to meet our financial obligations, I’d probably still be paying for that sucker today.”

Fortunately, the people who committed to the conference showed up. The second annual conference boasted 87 attendees and 21 speakers. It was there that Anne Falluchi debuted her magazine, *Facilities Design and Management*.

“At some point, if we hadn’t said ‘come on guys, let’s put on our engineer’s caps and railroad this baby through,’ then we would probably still be talking about it. Sometimes you’ve just got to grab the bull by the horns and take some action when the opportunity presents itself,” Back said.

According to Back and Graves, the best was yet to come. Shortly after the 1981 convention, Jim Chambers and a group of Canadian facility professionals joined the Association, and the name was changed to what we know today as the International Facility Management Association.

“With FMI’s help, everything just sort of blossomed,” Graves said. “We have grown so fast in so few years, and I think we’re still just scratching the surface. IFMA is an organization on the move!”

*A list of IFMA’s milestone history is available upon request from chapter support.



IFMATM

International Facility Management Association

Empowering Facility Professionals Worldwide

Chapter Management & Administration

Section 2

As IFMA chapter leaders, you need to have a basic knowledge of association law in order to protect IFMA, your chapter and yourself. It is critical that you review this section carefully! It contains basic legal, financial and operational requirements. The following important areas are covered:

- IFMA's Relationship with its chapters
- Chapter Minimum Standards
- Month-by-Month Operational Timeline
- Chapter Bylaws and Policies
- Antitrust Policy
- Chapter Meeting Requirements
- Re-certification
- Basic Accounting Information
- Record Retention
- Branding guidelines including use of the logo and IFMA name
- Available online chapter reports

IFMA's Relationship with its Chapters & Incorporation

Chapters are a part of IFMA by virtue of an affiliation agreement in which chapters and IFMA agree to specific conditions. When those conditions are met, a chapter is granted a charter. Responsibilities that ensue with the granting of that charter include adherence to the IFMA Constitution and Bylaws, Code of Ethics, Antitrust Compliance Program, and a yearly re-certification. Copies of IFMA's Constitution, Bylaws and Code of Ethics are available on IFMA's Web site at www.ifma.org under About IFMA. A chapter re-certification template upon request from the components team via components@ifma.org.

All chapters chartered in the United States are individually incorporated as 501(c) 6 organizations under the Internal Revenue Code. Each has its own Employer Identification Number (EIN) provided by the IRS. Chapters outside the U.S. are registered within their respective countries. Just as insurance coverage protects chapter leaders from one type of liability exposure, incorporation protects chapter leaders from tax liability and other assessments. CT Corporation System serves as IFMA's registered agent in each U.S. state containing a chapter(s). All federal tax reporting duties are handled by IFMA headquarters and its accounting firm using, in part, information gathered in the chapter re-certification process.

Chapter Minimum Standards

Definition: **Standard** *adj.* – Means of determining what a thing should be.

1. Chapter Officers – Must have a minimum of president, vice president, treasurer, and secretary. IFMA headquarters recommends the chapter have the minimum of the executive committee listed above and a member chair, program chair, and communications chair.

2. Chapter bylaws – IFMA headquarters has a template that has been pre-approved for chapter use. Any changes must be approved by IFMA's board of directors before the changes go to the general membership. This template was developed by a lawyer and professional parliamentarian. Most chapters will adopt this template with no changes.

3. Annual meeting – Each chapter is required to have an annual meeting. The chapter treasurer and secretary must give reports on the state of the chapter.

4. Chapter policies – Chapters can develop and approve policies for their operations. Many times, chapters wish to add such operational items to their Bylaws. Bylaws are purposely broad to allow chapters to operate effectively.

The following Policies are required; templates are available in the Policies Manual Handbook.

- Antitrust Compliance
- Conflict of Interest Policy
- Conflict of Interest Statement of Disclosure
 annual completion by appropriate component leaders
- Governance Policy
- Joint Venture Policy
- Record Retention and Destruction Policy
- Whistleblower Policy

IFMA headquarters strongly recommends the following policies be developed and approved by the chapter's board.

- Financial controls;
- Reimbursement of chapter officers for chapter-related expenses;
- Non-members attending meetings and/or programs;
- Use of membership directory (non-members etc.)

5. Minimum of four chapter meetings a year

6. Chapter re-certification – Must be submitted annually. The package must include revenue and expenses and balance sheet, budget for next fiscal year, bank statement, chapter officers and committee chairs including term dates, board meeting minutes, newsletters and programs list.

7. Annual budget – Must be submitted with the chapter recertification package. IFMA headquarters recommends the chapter begin working on the budget four months prior to fiscal year-end.

8. Chapter strategic plan – IFMA headquarters staff can facilitate a strategic planning session using IFMA's Strategic Planning for chapters template.

9. Membership retention and recruitment plan – The chapter should have goals set for membership retention and recruitment.

10. Professional development plan – The chapter should have goals set for the chapter's programs. Programs should be scheduled that directly assist members, both Professional and Associates with their jobs.

Month - by - Month Operational Timeline

EVERY MONTH

- Update chapter web site
- Read the IFMA Wire
- Read Chapter Leader or Component Leader Update emails
- Communicate with chapter membership
- Attend chapter leader conference call
- Contact component liaison
- Send bank statements, board meeting minutes, treasurers reports and program announcements to components@ifma.org

January

- Succession planning
- Begin preparation of your Awards of Excellence submission.
- Verify the chapter's link from IFMA headquarters site.

February

- Continue working on your Awards of Excellence submission.
- Attend chapter leader conference call/webinar

March

- Continue working on your Awards of Excellence submission.
- Review requirements for re-certification.
- The nominating committee is appointed and begins to meet.
- Have chapter leaders attend Facility Fusion volunteer leaders track

April

- Continue working on your Awards of Excellence submission.
- Nominating Committee prepare a slate of officers for July 1.
- Review requirements for re-certification.

- Awards of Excellence nominations due to IFMA
- Officer slate is presented to the board; nominations are accepted from the floor.
- Following this meeting the ballot is distributed to the membership.
 1. include the original slate
 2. include nominations from the floor
 3. include write in space
- Register for IFMA's World Workplace.
- Review requirements for re-certification.

June

- Register for IFMA's World Workplace.
- Announce chapter officers and send the officer roster list to headquarters.
- Form committees, engage members in volunteer opportunities.
- End of fiscal year - June 30.
- Prepare to submit recertification package.

July

- Submit re-certification package.
- Review chapter bylaws.
- Hold chapter annual meeting.
- Register for IFMA's World Workplace.
- Verify the chapter's link from IFMA headquarters site.
- Update board and committee chair info on chapter website and send to components@ifma.org

August

- Select Strategic Planning Committee, and plan retreat.
- Chapter re-certification package due at IFMA headquarters August 10.
- Register for IFMA's World Workplace.

September

- Register for IFMA's World Workplace.
- Submit delegates for House of Delegates meeting.

October

- Attend IFMA's World Workplace.
- Do not schedule a major chapter event for October due to IFMA's World Workplace.

November

- Report on World Workplace to your chapter board and members.

Chapter Bylaws and Policies

Chapter Bylaws

An affiliation agreement and a set of bylaws corresponding to those of the Association must be approved by the members of a chapter and the Association's Board of Directors before a charter can be granted to the chapter as noted in Article VIII, Section 5 of the IFMA Bylaws. These are legal documents that regulate internal corporate affairs and provide a guide to chapter structure and operation to ensure consistency from year to year. Chapter officers are elected to ensure that the chapter complies with its bylaws and policies and to chart the future of the chapter. Contact the components team for a copy of the chapter bylaws template as set forth by the Association.

Bylaw Revision

Most chapters will adopt the bylaws templates as written. It was prepared by a lawyer and professional parliamentarian. When it is determined by a chapter's officers that revision of the bylaws is warranted, the proposed amendment(s) must be submitted to IFMA headquarters for approval prior to submission to the chapter's membership. The chapter should consult with its chapter liaison prior to working on any amendments to your bylaws. IFMA headquarters will advise the chapter on appropriate bylaw amendments and describe the process.

Chapter Policy Manual

It is recommended that each chapter maintain a policy manual. Such a manual is a description of the chapter's day-to-day activities and a record of decisions made by the board of directors. The manual also serves to clarify and expand upon the bylaws. It also serves as a guideline for chapter leaders to ensure consistency from one administration to the next and prevent the need to 'reinvent the wheel'.

Chapter policy may be set by the chapter's board of directors, except in areas addressed by the associations or chapter's constitution and bylaws, and any changes should be noted in the policy manual. Matters in which there is a question of constitutional propriety should be referred to IFMA for review.

It is the responsibility of the chapter secretary to keep accurate records of decisions made by the board in the Chapter Policy Manual. It should be reviewed and updated as needed annually. All current and new chapter officers and committee chairs and should be given an updated policy manual at the beginning of their terms. Provide a copy of the Chapter Policy Manual to IFMA headquarters. The chapter must have set policies on

A chapter policy manual template is available, contact the components team.

Member Compliance

By joining IFMA, members consent to abide by the constitution and bylaws, Code of Ethics and policies of the association and the chapter. In order to assist members in becoming familiar with bylaws and policies, chapters are encouraged to print them in directories, distribute them at meetings and otherwise make them readily available. All new policies and/or reviews of current policies should be published on the chapter site, in the chapter newsletter or via a special mailing.

Contracts

Every year a few chapters end up on the short end of a contract they have signed with a golf course, hotel, restaurant, country club, etc. Not knowing what to look for when your council or chapter needs to engage one of these facilities for a function can cost plenty!

One of the services that IFMA provides to our chapters and councils is a review of such contracts **before they are signed**. This can save you not only a lot of money in the long run, but can also provide you with a real measure of comfort and assurance that you are doing the right thing for your chapter or council. All you have to do is email a copy of the contract to components@ifma.org and we will review it for some of the most common contract issues. IFMA strongly recommends that we review each and every contract prior to being signed by your chapter.

Remember – many IFMA staff have been specifically trained in contracts and review contracts on a regular basis. Of course, there is no charge for this service. A little extra time on your part can save everyone a lot of money and headaches down the road. Please contact the components team for more information.

Antitrust Policy & Compliance

The International Facility Management Association is subject to the antitrust laws of the United States, as are most professional societies. While antitrust issues generally apply primarily to trade associations, IFMA, by its very nature, provides a setting for the occurrence of antitrust transgressions. That being the case, it is important for IFMA chapters to be aware of the related guidelines in order to avoid any antitrust activities.

Federal law prohibits “contracts, combinations and conspiracies in restraint of trade.” The two laws that define the antitrust liabilities of professional societies **the Sherman Act** and **the Federal Trade Commission Act** are very general in their wording and broad in their scope. Over the years, the courts have interpreted the broad language of the statutes and have provided specific examples of unlawful conduct. Some blatantly unlawful acts include: price fixing, refusals to deal (i.e., boycotts), allocation of markets and “tie-in” agreements requiring customers to buy some unwanted product as a condition of purchasing the item desired.

The following basic principles are endorsed by the Board of Directors as a guide for all IFMA members, and are herewith requested of all chapters for adherence:

- IFMA shall make every effort to insure that its actions comply with both the letter and the spirit of the antitrust laws.
- Individuals meeting the requirements of membership as set forth in IFMA’s bylaws shall be welcomed into the chapter on a non-discriminatory basis. All members shall be entitled to the same services on a non-discriminatory basis. No one shall be expelled except for just cause, and then only in such manner as is established in IFMA’s bylaws.

- A chapter shall not indulge or sanction any discussions of current or future fees or prices for public speaking. Chapter meetings and publications will never be a forum for the exchange of information which could lead to the establishment of cooperative arrangements or activities in violation of the antitrust laws.
- A chapter shall conduct all statistical and informational exchange functions on a voluntary basis, and all data collected shall be treated confidentially and in accordance with antitrust laws.
- A chapter shall not enter into or sanction any agreement which restricts competition between members or within the profession. Standards established by IFMA and the chapter shall be formulated so as to ensure that there is no anti-competitive effect on the members or the profession itself.
- Programs sponsored by the chapter shall be conducted in a non-discriminatory manner.
- IFMA and the chapter subscribe to the philosophy that free trade and the interaction of competitive forces yield the best allocation of economic resources, the lowest cost to clients, the highest quality and the greatest progress.

Violating the antitrust laws is a serious offense. Maximum penalty for a corporation convicted under the Sherman Act is a fine of \$10 million or twice the financial gain derived from the crime. Maximum penalty for an individual is three years imprisonment and a fine of either \$350,000 or twice the financial gain derived from the crime. Jail terms and fines for individuals are mandatory under the guidelines. The government may issue civil cease and desist orders and ask that the association be dissolved. Private suits against the violator for treble damages can also be brought.

IFMA Antitrust Compliance Program

What kinds of activities are covered under the Antitrust Compliance Program?

- Meetings;
- Minutes of Meetings; and
- Membership Acceptance and Expulsion.

Meeting Guidelines

Because associations are vehicles for attracting competitors, we must establish policies and procedures that ensure compliance with antitrust laws. Since chapter meetings may be attended by competitors, there are forums where antitrust violations could occur, inadvertently or not. Conscientious antitrust compliance and fairness to participants demands that association meetings be conducted properly. As a safeguard, meeting procedures and subject matter need to be carefully chosen and followed.

While these guidelines appear strict, they will provide reasonable compliance with the letter and spirit of antitrust laws and will put IFMA in a preventative legal position. If there is ever question as to whether or not an item is proper for discussion, discussion should be deferred pending advice from legal counsel.

Chapter Business Meeting Requirements

Meetings should be announced in advance and in writing (delivered via mail or e-mail) with a detailed agenda. Each meeting should be conducted by a designated officer or chairperson, and the prepared meeting agenda should be followed and accurate minutes should be kept.

An agenda of topics to be discussed at each meeting should be prepared by the meeting chairperson or a designee.

- The agenda should be distributed to members with each notice of the meeting.
- The agenda should specify the topics to be discussed and contain sufficient background concerning each topic so that members will be informed as to the purpose of the topic. Also include any past action concerning the topic and any new action sought.
- The agenda must be strictly followed by the meeting chairperson and members. Items not on the agenda should not be considered or discussed. If a member raises an issue that is improper for discussion, it should be pointed out and the discussion ended.

The meeting chairperson or designee has the following responsibilities and duties:

- Set the meeting date.
- Prepare a written agenda.
- Call the meeting to order, direct the meeting in accordance with the topics on the written agenda and adjourn the meeting.
- Terminate discussion of topics not on the written agenda.
- Record the names of each member, speaker, guest or other non-member present at the meeting.
- Prepare minutes of the meeting and ask for review if there are any items in question.
- Prevent any prohibited activities from occurring.

Prohibitions

The following activities are strictly prohibited:

- Secret, unannounced or 'rump' meetings before, during or after announced meetings. If the chapter has paid an administrator, he or she generally should attend all meetings;

- Coercing attendance at meetings;
- Coercing those attending a meeting to participate in the meeting;
- Committing or otherwise binding IFMA to do or not to do something without prior consent by the Association's Board of Directors; and
- Policing the business practices of individual members.

The following topics shall not be discussed at chapter meetings under any circumstances:

- Fees, prices, terms or conditions of sale of professional services to clients;
- Fees, prices, terms or conditions of sale with or from suppliers;
- Agreements, expressed or implied, to deal or not to deal with any party;
- The fee structure of the profession in general and fees or prices charged or paid by anyone in the profession;
- The naming of individual clients or competitors, unless counsel is present, regarding their performance, prices, credit experience or other related topics; and
- Fee or pricing 'suggestions' whether seriously or in jest to any other party.

The following topics shall not be discussed without prior review and approval by IFMA headquarters staff, IFMA Board of Directors and/or legal counsel:

- Resolutions or recommendations;
- Credit reporting;
- Statistical reporting;
- Standards or certification programs;
- Oral or written communications with any government agency;
- Expulsion or denial of membership; and
- Joint research.

Minutes of Chapter Meetings

Minutes are the official record of what has transpired at a meeting. They are important in that they represent the only legal record of any meeting.

Minutes reflect what has occurred, not necessarily what was said. They should not be transcripts of the discussions at meetings but should report only the actions taken by the organization during that meeting.

The components of any good set of minutes will include:

- Date, time and place;
- A statement that the meeting was called pursuant to proper notice;
- A statement that a quorum was present under the bylaws or other governing documents stating that business may be officially transacted;
- The identity of those present, including guests;
- A report of the business transacted, including approval and/or amendment of the previous meeting's minutes, all motions duly presented, actions taken on the motions and declarations of whether the motion passed, failed or was deferred;
- Statements of reports made. The degree of detail included in the minutes depends upon the nature of the report and the action required. If a report is presented in written form, it is acceptable to attach a copy to the minutes and show that the report was received and/or acted upon; and
- Reports of motions requiring special legal treatment such as bank resolutions. These types of reports should be attached to the minutes with notation of reception or action.

In recording minutes, if votes are verbal, a proper recitation would be: 'Upon motion duly made, seconded and unanimously passed it was agreed that...''

If votes are to be recorded, the format is basically the same except that a recitation of votes in favor, against or abstaining would be included for all persons present with voting rights.

In all cases, minutes, after they have been duly approved, should be placed in a permanent book and or stored electronically where they will serve as the official record of action taken by the organization. A copy of the minutes of each meeting should be forwarded to IFMA Component's team along with distribution to chapter officers. Note that meeting minutes are a requirement for chapter recertification and, if not previously provided, they will be requested before recertification can be granted.

Annual Chapter Re-certification

Article VIII, Section 6 of the IFMA Bylaws requires that all chapters be re-certified by the Association each year. Information which must be provided to IFMA for re-certification includes: year-end (1) financial statements; budget for the upcoming year; a list of all chapter programs and topics conducted in the past year; copies of any newsletters published in the past year; copies of all board meeting minutes for the past year; bank statement for the end of the fiscal year; and the Chapter's Strategic Plan. Chapters have the option of submitting these materials in total with their re-certification package or submitting items such as meeting minutes and newsletters as they are produced over the course of the year.

The deadline for re-certification is August 10. The purpose is to ensure that chapters representing the Association are adequately serving their members and conducting themselves in a professional manner. Failure to re-certify will result in de-certification by IFMA, which includes a cut-off of all funding, and may ultimately lead to the dissolution of the chapter and the revocation of its charter. The chapter re-certification template is available in the Treasurer portion of this manual.

Basic Accounting Information

The basic accounting functions defined below will provide your chapter with a clear view of its financial condition.

Financial Statements

The principal purpose of a not-for-profit organization's financial statement is to communicate the ways resources have been used to carry out objectives. Two financial statements in particular should be prepared each month and reviewed at board meetings. They are:

- A **Balance Sheet**: A summary of assets and fund balance intended to present the chapter's current financial position.
- A **Statement of Revenue, Expense and Change in Fund Balance**: A summary of activity for a specific period of time intended to present the results of operations.

An annual budget of the monetary requirements needed to accomplish the goals and objectives of the chapter should be prepared for both revenue and expenses. Also see the job description for chapter treasurers on page 3.10 of this manual.

Annual Audit of Financial Statements

The financial statements for the fiscal year should be audited or reviewed by an independent party. Because this process - if performed by a certified public accountant - can be expensive, consideration should be given to this item when preparing the chapter's annual budget. If budgetary restrictions preclude a formal audit, a review by an independent party is recommended. The chapter may wish to enlist a Past President to serve on the audit committee.

Income and Expense Reporting

Chapters must submit an Annual Statement of Income and Expenses and a Balance sheet to Association headquarters on or before August 10 of each year. This is an important part of the annual chapter re-certification process, which is required under Article XIII, Section 8 of the IFMA Bylaws. Each chapter's fiscal year must comply with that of the Association, which is July 1 through June 30. Present the latest bank statement and prepare a monthly financial statement to present and be reviewed at each board meeting.

Incorporation

The Association files incorporation papers for each North American chapter in the state or province in which it is located. The Association works with the appropriate authorities of the countries in which it has international chapters to ensure that the chapters are properly registered.

Filing for incorporation as a not-for-profit association reduces the personal liability of chapter officers.

Reports Required by Federal, State or Provincial, and Local Agencies

The Association files federal group tax returns for its chapters in the U.S. and Canada based on the financial statements submitted. It also files individual federal tax returns for its international chapters. However, states, provinces and municipalities also may require separate reports from not-for-profit organizations active within their jurisdictions. It is the responsibility of the chapter to determine and perform any such filing requirements on a timely basis.

Tax Status

The International Facility Management Association is a not-for-profit, incorporated association chartered in the state of Michigan and conducting business in the state of Texas. IFMA has received a tax exempt status from the U.S. government as a professional society under Section 501(c) 6 of the Internal Revenue Code. Refer to the group exemption letter from the Internal Revenue Service available through the Component's team.

Financial Statement Preparation and Presentation

In order to prepare a financial statement at any given point, each chapter should maintain comprehensive accounting records that conform to generally accepted accounting principles. Each chapter will work on a cash basis not accrual.

Journals

The IRS requires each chapter to maintain the following:

- **Cash Receipts Journal**
Used to enter all incoming moneys deposited into the cash accounts and to classify the revenue on the proper account.
- **Cash Disbursements Journal**
Used to enter all disbursements made through the checking account and to classify the expenses to the proper object account.
- **General Ledger**
Used to summarize the activity of the journals and accumulate the totals in each individual object account. The year-to-date balances in the general ledgers are the same figures that are used to prepare the financial statement.

Additional subsidiary journals which your chapter might require include, accounts receivable from members, accounts payable, an inventory of fixed assets and investment records. A chapter's board of directors should determine which subsidiary journals the chapter requires.

From the balances of the general ledger, each chapter should prepare a financial statement for presentation to its board of directors within the time frame set by each individual board. Each chapter is required to submit an annual financial statement to IFMA headquarters for the July 1-June 30 fiscal year for inclusion in the Association's group filing under Internal Revenue Form 990, Tax Return for Organizations Exempt from Income Taxes. This information should be submitted to IFMA on or before August 10 following the close of the fiscal year. In order to maintain IFMA's tax exempt status under the group exemption, there will be **NO** exceptions to this reporting requirement.

For preparation of Form 990, the financial statement must conform to the standard reporting format as outlined in this section. This format should be used as a guideline in the preparation of the financial statement because such information must be reported on the group return in a manner consistent for all chapters.

The financial statement should include:

- A Balance Sheet; and
- A Statement of Activity – Revenue & Expenses

The Balance Sheet should be dated as of June 30 and should summarize the assets and fund balances of the chapter as of that date. A sample format for this report may be found in the appendix of this manual. The Statement of Activity should be dated for the 12 months ending June 30 and should include the activity for that period with reconciliation between the beginning and ending fund balances. In reporting information from this statement, the IRS requires that revenue and expenses be broken down into the following categories:

- **Program Services**

This represents revenue and expenses that can be directly attributed to a specific program, function or activity. For example, revenue received from registration fees for a meeting would be classified as program revenue, while the expenses for conducting the meeting would be classified as program expenses.

- **Membership**

This represents revenue and expenses that can be directly attributed to membership development and retention programs.

- **Administrative Costs**

This represents revenue and expenses that cannot be associated with a single program but are indispensable to the production of programs and to the chapter's existence, including expenses for the overall direction of the chapter's general board activities, business management, general record keeping, budgeting and related purposes.

Developing Chapter Internal Controls

Establishing internal controls allows for the proper handling of chapter funds. The president and treasurer should work together to account for funds in such a manner that there are no questions about handling of all cash receipts and disbursements.

Internal controls are necessary to protect not only the treasurer, but also the chapter board. The segregation of duties as detailed may seem impossible due to a lack of personnel but adequate procedures can be initiated.

Duties should be adequately separated (i.e.: different persons prepare checks, sign checks, reconcile bank accounts and have access to cash receipts). Set established policies as to what the chapter will be reimbursed for.

Important Oversight Action Items:

- Make changing the bank signature authorities a **PRIORITY** for your chapter as soon as elections are complete.
 - o Remove former leaders
 - o Add new officers as the chapter Board feels appropriate. We suggest that at least three should have access/authority but that you probably need no more than four or five with access (for our largest chapters).
 - o **NEVER** allow the account(s) to have just one person with access/signature authority
- **Officers with bank account access (online) agree to monitor use of chapter credit cards on a regular basis to look for inappropriate charges and withdrawals. This is a critical action item!**
- **Officers with bank account access (online) agree to monitor chapter checking and savings account(s) regularly for inappropriate expenses. This is a critical action item!**

Cash Disbursements

- Ensure that all disbursements are properly supported by evidence of receipt and approval by the president for related goods and services.
- Disbursement by checks is strongly preferred because of the paper trail it will provide.
- Chapter credit/debit cards are used by some chapters. Chapters should be aware that another layer of controls will be required if credit/debit cards are used including close and frequent monitoring of bank and/or credit card accounts. Chapters that have a chapter credit/debit card should adopt a credit card use policy that is to be signed by any officers allowed to use the card. There is a sample credit card use policy in the chapter Policy Manual Handbook, Section 8
- Perforate, stamp or use other procedures to prevent reuse of vouchers like petty cash slips and others.
- Approve payment only on original invoices, bills of lading and all other requests for payment.
- Require dual signatures on all checks above a predetermined amount (chapter board should approve a threshold).
- Prepare monthly bank reconciliations.
- Financial statements and treasurer's report need to be a **required agenda item** at each Board meeting. Ensure that your Board understands the importance of their scrutiny of these reports and that they will be asked to vote in the affirmative at the meeting **that they have reviewed** and approve the treasurer's report.

Billing and Receivables

- Promptly endorse all checks "for deposit only."
- Bill and record all goods shipped and services performed.

- Bill using serially numbered invoices.
- Use fee schedules or contractual terms covering goods and services for computing billing amounts and budgeting. All exceptions to price list amounts must be approved by the chapter president.
- Periodically balance detailed receivable records with the general ledger control accounts.
- Gain the chapter president's approval for non-cash credits such as bad debt write-offs and receivables.
- Periodically prepare an aged trial balance of receivables and take follow-up action on overdue balances.
- Adequately separate duties so that the person who maintains the invoices does not have access to cash and cannot approve credit to members, authorize non-cash credits to receivables or authorize shipments of goods or performance of services.
- The president should always review the chapter finances before signing.

Guidelines for Chapter Record Retention Schedule

| ITEM | Retention Period |
|---|------------------|
| IFMA-Specific Items | |
| Yearly Chapter Re-Certification Package (which will include financial statement and budget) | Permanent |
| Chapter Charter, Constitution & Bylaws | Permanent |
| Board Minutes | Permanent |
| Historical Records, including officer rosters, newsletter, program announcements | Permanent |
| General Accounting Records | |
| General Ledger | Permanent |
| Cash Receipts Book | 5-7 Years |
| Cash Disbursements Books | 5-7 Years |
| Audit Reports | 5-7 Years |
| Fixed Assets Records | Permanent |
| Bank Statements, Cancelled Checks, and Signature Cards | 5-7 Years |
| Paid Invoices | 4 Years |
| Employee/Officer Expense Reports | 4 Years |
| Petty Cash Records | 4 Years |
| Tax Records | |
| Withholding Tax Statements (W-2s, W-3s) | 7 Years |
| Payroll Tax Returns | 5 Years |
| State Income Tax Returns | Permanent |
| General Administrative Items | |
| Contracts & Leases (after termination) | 7 Years |
| Postage Meter Record Book | 1 Year |
| Payroll Records | Permanent |
| Employee Insurance & Pension Records | Permanent |
| General Correspondence, including email, can be kept electronically or hard copy | 18 Months |

IFMA RECORD TYPES

| <u>CODE</u> | <u>DESCRIPTION</u> | <u>CODE</u> | <u>DESCRIPTION</u> |
|--------------------|---------------------------|--------------------|---------------------------|
| A | Associate | CA | Chapter Administrator |
| ED | Head, FM Program | FM | Former Member |
| FP | Former Professional | L | Lifetime |
| M | Professional | NM | Non Member |
| PM | Potential Member | R | Retired |
| S | Student | SL | Corporate Sustaining |
| WA | Associate Waiting | WM | Member Waiting |
| WR | Retired Waiting | WS | Student Waiting |
| WSL | CSP Waiting | YP | Young Professional |



IFMATM

International Facility Management Association

Empowering Facility Professionals Worldwide

Chapter Executive Board

Section 3

The Role of the Executive Board

The board is the main decision-making body of the chapter; therefore a board member must be well informed, prudent and responsive to the needs of the chapter.

The Role of the Executive Board

The board must ensure the continuity of the chapter by:

- * Planning for the future;
- * Keeping the chapter fiscally sound; and
- * Establishing and reviewing policies and procedures that support the chapter's mission, vision, core principals and strategic plan.

Who and How Many?

IFMA requires that all members of its chapters also be members of the Association. Your bylaws specify your chapter's particulars regarding board members, terms of office, nominations, elections, etc. If you do not have a copy of your bylaws, contact the IFMA Components team and have a copy sent to you.

In smaller chapters, board members often must serve as committee chairs, and sometimes as the entire committee. Larger chapters may have both the resources and the need to delegate committee assignments while maintaining board oversight.

Who Votes?

The member of the chapter's executive board votes along with any directors appointed by the chapter's president. Committee chairs of the chapter do not vote unless they are named directors.

An Informed Board Member is an Effective Board Member

It is important that board members undergo training and orientation in order to gain a thorough understanding of their responsibilities. The board makes a significant contribution to chapter activities. By no means should it be a "rubber stamp" group that automatically approves any business placed before it without discussion and consideration. A chapter's success depends largely upon its board members' knowledge of their roles and acceptance of their responsibilities. But board members must not only understand the structure and operation of IFMA and their chapter, they must also be sensitive to human needs and wants as well. As leaders of a volunteer organization, board members must be able to motivate people on an emotional level.

Responsibilities of an Executive Board Member

- **Periodically review your chapter's bylaws, strategic plan and other important documents to understand the objectives of your chapter and the Association and how they relate to your role.**
- **Become acquainted with chapter business and policies by reading the minutes of past board meetings.** This allows you to learn the what, when, why and how of board accomplishments and actions.
- **Attend board meetings well-informed about the issues on the agenda and be prepared to discuss them.** Consult with the president prior to the meeting if you have any questions about an item.
- **Formulate policies in the best interest of your chapter based on your knowledge of its needs.**
- **Support board actions, policies and positions adopted by the board.**
- **Make decisions on resource allocation and financial issues with full knowledge of your chapter's capabilities and limitations based on an annual budget.**
- **Approve, establish, prioritize and evaluate chapter programs and services to make sure they serve the mission of the chapter.**
- **Become familiar with the basics of association law as it applies to your duties.** Develop a basic knowledge of IRS regulations and antitrust laws that apply to chapter activities. Know the extent and limits of your liability as a volunteer leader. Most of this information is available in this manual as well as the annual Component Management Workshop Webinar.
- **Make use of information contained in IFMA publications to stay abreast of issues that affect your chapter and its members.** Foremost among these are the chapter resources available on www.ifma.org. Other information of interest may be found in Chapter Leader Updates, *FMJ* and in other periodic communications from IFMA's board and staff. Pass relevant information along to appropriate individuals, committees and/or the general membership.
- **Make sure a board member, administrator or committee chair has access to the chapter reports and knows how to use them.** For information on gaining access, instructions for use and benefits contact the IFMA Components Team.
- **Take advantage of IFMA development and networking opportunities.** Plan to attend the Chapter Leader Conference Call and monthly webinars; and encourage your officers to do the same. These are an excellent opportunity to meet other council and chapter leaders.
 - IFMA's World Workplace
 - IFMA's Facility Fusion
 - Chapter leader teleconferences

Characteristics of an Effective Volunteer Leader

An important resource in your efforts to move your chapter forward comes from the close working relationships you build with your fellow chapter leaders.

Each leader brings a unique combination of experience, knowledge, contacts and commitment to the position. When people work together, individual talents are multiplied and the group develops clarity of thought, purpose and vision that no single person can achieve alone. Because so much of the success of a chapter depends upon group action and cooperation, an understanding of group dynamics is a necessity.

Here are a few simple rules that will help you interact better in a group situation and will allow the group to function more effectively:

- Come to meetings well-informed and prepared to make a contribution.
- Set an agenda and adhere to it. Limit disruptions and avoid aimless discussion.
- Be sensitive to the feelings of others and diffuse tension with skillful diversions.
- Encourage free-flowing discussion.
- Express your views clearly, and keep comments short and to the point.
- Listen actively.
- Be tolerant of different viewpoints.
- Help others to express and expand upon their ideas.
- Keep records, and make progress reports.
- Recognize and reinforce the importance of the task at hand.
- Attend chapter leader teleconferences.
- Develop a relationship with your chapter liaison at IFMA headquarters.

Chapter Executive Board

A board is a group of people who are legally charged to govern the chapter. The board is responsible for setting strategic direction, establishing board policies and objectives and hiring and evaluating the chapter administrator. These officers shall be elected annually and shall take office as directed in the chapter's bylaws. Chapters may combine the offices of secretary and treasurer. **All members in good standing may hold office on the executive board.**

Attached are job descriptions for each position.

- **President**
- **President - elect**
- **Vice President(s)**
- **Secretary**
- **Treasurer**
- **Past President**

Chapter Board of Directors:

From the Chapter Appendix to Bylaws template -

The Chapter's Board shall at a minimum consist of four members including the President, Vice President(s), Secretary, Treasurer and Immediate Past President. The maximum number of board members is set in each individual chapter's bylaws. (The chapter may choose to combine the duties of the Secretary/Treasurer.) The chapter may choose to include on the board additional directors whose duties and responsibilities shall be as approved by the Association's Board. Non-officer directors are appointed by the President and serve until the commencement of the next Presidential term.

Chapter President

Description

The President is the chief executive officer of the chapter, performing all duties expected of the office as required by the bylaws and the board of directors. The president is an ex-officio member of all standing and special committees (except the Nominations Committee) in the chapter and is the primary liaison between the local chapter and IFMA headquarters. Generally, the president may succeed him or herself, but shall not serve more than two consecutive terms as dictated by the chapter's bylaws. After the president completes his or her term, it is important that he or she remain on the chapter board of directors as past president in an advisory capacity.

Leadership

As president, your first concern is leadership. You are the overall coordinator of your chapter and set the example for excellence with your resourcefulness, tact and inspiration. Be sure to delegate authority as well as responsibility. Strike a balance between allowing others the freedom to do their jobs and maintaining overall control of your chapter. You have the final responsibility for the work that is done, and you should be aware of all officer duties and responsibilities.

- **Set the tone and specific goals for your administration.** Establish and set specific goals for your term of office. Strive to improve the chapter and motivate its members. Working with your executive committee, decide from the beginning what your plan will be for reaching your goals. This should include:

Membership growth: Determine efforts the chapter will make to promote IFMA membership and encourage prospective members to join. Determine how the chapter will retain existing members.

Publicity: Create a plan for building awareness through media coverage. Notify your local media of meetings and special events well in advance, and invite them to attend. Have your program and membership committees work with the media and other community organizations. IFMA can provide a media list for your city upon request.

Education: Familiarize yourself with IFMA's core competencies. Encourage members to become certified. Develop a calendar of programs that will foster both personal and professional growth within your chapter's membership. See the Education section of this manual.

- **Build a program plan for your term of office.** Hold a board of directors' retreat or operational planning session to strategize the chapter's plans for the upcoming year. Prepare a master calendar, and communicate to all chapter members and the IFMA Components team.
- **Work with the treasurer to prepare an annual budget as well as a forecasted budget.**

- **Preside over chapter board meetings.** You, or a designated board member, should preside over every meeting of your chapter to ensure continuity. Each meeting should follow a previously published program and adhere to *Robert's Rules of Order*. Begin and end the meeting on time, and keep meetings concise and on track.
- **Delegate responsibility, and provide support.** While you have overall responsibility for all chapter functions, many of them will have to be delegated to your fellow officers and their committees.

As president, you are an ex-officio member of all standing and ad hoc committees. Except for the executive committee, which you chair, you appoint all committee chairs. You also may delegate oversight of various committees to other executive committee members.

It is your duty to ensure that the chapter officers and committee members understand their duties and assignments function properly and keep accurate records for their successors. Distribute officers' job descriptions, and make sure they understand their role and duties. You should be ready to assist and provide direction to the other chapter leaders so they can perform their jobs as effectively as possible.

- **Create an action plan for succession of leadership.** Develop a plan to ensure a smooth transition from one board to the next. Work with board members to identify, educate and cultivate interested and capable members toward assuming future leadership possibilities. Succession management resources are available online within the chapter and council leader resources section of the IFMA Web site.

Administration

As president, you also have administrative responsibilities.

- **Become familiar with both the association's constitution and bylaws and those of your chapter and review them periodically.** Ensure that the chapter is operating in compliance with Association, state and local laws and regulations. As the presiding officer, you are the final authority on matters of procedure and policy. The constitution and bylaws provide detailed information on membership, dues and fees, meeting frequency, etc. Encourage proper procedures to be used for chapter elections, i.e., that eligibility to hold office is enforced.
- **Prepare in advance for each chapter meeting.** Your leadership will determine the amount of preparation that goes into a chapter meeting, which in turn will determine the quality of the meeting. Prior to each meeting, confirm that all necessary arrangements have been made for the meeting. Also confirm with the secretary and treasurer that all materials and information needed for the business portion of the meeting are in order.

- **Appoint these two committees during your term.**

Nominating Committee. Three months before your chapter's elections, appoint a nominating committee of at least three members, one of whom is a past president. This committee will select candidates for chapter offices and, with the consent of the candidates, report the names to the membership prior to the election. Additional nominations should be allowed from the general membership.

Audit Committee. About three months before the close of your term in office (also at midpoint if desired) appoint a committee of at least three members to make a complete audit of the chapter's finances. Their findings should be reported to the executive committee, copied to IFMA headquarters and made a part of the permanent record. Yearly audits ensure a successful transition.

- **Call for regular chapter committee reports.** To keep the necessary parties informed, all committees should report regularly to the chapter on their activities. The treasurer also should provide regular updates on the chapter's financial situation. He or she must provide an original copy of the most recent bank statement at board meetings.
- **Sign all agreements and formal instructions.** Co-sign all checks with the chapter treasurer if there is not a chapter administrator.
- **Send all contracts and agreements to IFMA headquarters for review prior to signing.**
- **Send financial statement to IFMA headquarters to assure timely filing of the chapter's annual re-certification package for the year ending June 30.** President is to sign the chapter re-certification package which is normally due on August 10th.

Chapter Representative

As president, you need to understand and promote your chapter's identity within the Association. You may also be called upon to speak for your chapter and the Association in various capacities, representing them at outside activities.

- **Representation within the association:**
 1. **Attend (or send delegates to) the association's Annual Meeting and House of Delegates Meeting.** IFMA's constitution and bylaws mandate these important meetings. Held during World Workplace, the Annual Meeting is the association leadership's formal opportunity to report to the membership on the events of the previous year and plans for the future. The House of Delegates is IFMA's legislative body and is made up of local leaders like you. You will have the opportunity to submit items for discussion and to possibly vote on items placed on the agenda.

These meetings provide forums to discuss strategic initiatives and for representatives to interact with the association's Board of Directors and staff.

These meetings also provide an excellent opportunity for involved leaders to hear from staff, officers, and fellow delegates. The Annual Meeting will include review and approval of the previous year's meeting minutes and reports from IFMA's leadership. The House of Delegates will address agenda items that were submitted in advance by chapter and council leaders. The Chair may request a consensus opinion on recommending appropriate issues to the Board for consideration. Additional items from the floor will be addressed if time allows. All Association members are invited to attend the House of Delegates Meeting but only registered delegates may make motions or vote. Guests may request to be recognized if they wish to speak to an issue. Alternate delegates, when not serving as delegates, have the same rights as all other association members. No proxies are allowed. The President shall provide a summary of the action taken by the House of Delegates to the board of directors and association staff for review.

4. Represent your chapter and the Association in the community. You may be asked to speak about IFMA and/or facility management at community meetings and events. Such events can be an excellent opportunity to increase public awareness about the association and the profession. At the same time, good judgment is called for regarding how and when IFMA should be represented. Any questions about the propriety of an event should be directed to your chapter liaison.

Executive Committee

You chair your chapter's executive committee, which includes the vice president(s), secretary, treasurer and the immediate past president. This committee should meet consistently and conduct all chapter business except that which may be delegated to committees or is important enough to bring before the general membership.

- **Prepare a written agenda for board meetings and distribute them to board members at least seven days prior to the meeting.**
- **All executive committee actions should be reported to the membership at chapter meetings as information items or, if necessary, for approval.**

This committee, second only to the general membership in authority, has the primary role in maintaining a high standard of excellence in the chapter. The executive committee should:

- Coordinate the efforts of all other committees, including receiving regular committee reports;
- Work closely with IFMA headquarters; and
- Conduct chapter business.

Resources and Suggestions

Remember, you can't do it all by yourself. Don't hesitate to ask questions and assign duties to others.

- Keep chapter officers and members involved in chapter activities.
- Keep in regular contact with chapter officers and committee chairs. They are there to help you.
- Benchmark other chapters and network with other chapter leaders as much as possible.
- Take advantage of IFMA's Web site, www.ifma.org -especially the Chapter Leaders Resource area.
- Plan ahead!

Chapter Vice President

The duties of a chapter vice president vary widely from chapter to chapter. Assignments and job responsibilities are usually based on chapter tradition and are at the discretion of the president. Some general duties may include:

- **Preside in the absence of the president.** The vice president should work closely with the president and be prepared to step in should the president be unable to complete his or her term of office. In an ideal succession planning process, you should be capable of being elected president when the current president's term expires and conducting a seamless transition. It is imperative that he/she studies the chapter's bylaws and keeps up-to-date on all chapter activities. Additionally, the vice president will be the presiding officer at chapter and executive committee meetings should the president request or require you to do so.
- **Be available for advice and assistance.** Your knowledge of IFMA and the chapter makes you an important link between the chapter leadership and its members. Be available before and after meetings, especially to new members, and keep current on membership issues.
- **Attend executive committee meetings.** As a member of the executive committee, be receptive to innovative ideas that advance the chapter. As requested by the president, submit periodic reports outlining progress and problems in the chapter and its various committees.
- **Oversee the chapter programs in coordination with other officers.**
- **Help prepare the chapter's annual re-certification package.**
- **Assist the president in carrying out the business of the chapter.** Within the chapter's framework, there are many job responsibilities that can be appropriately delegated to the vice president/president-elect.

Chapter President-Elect

Many chapters choose to have a president-elect as a specific position in order to ensure officer succession and continuity. Assignments and job responsibilities are usually based on chapter tradition and are at the discretion of the president.

Chapter Treasurer

As treasurer, you have primary responsibility for management and control of chapter funds as well as the overall fiscal health of the chapter. You are responsible for the handling and reporting of all financial transactions and for preparing financial statements for the board and the general membership at specified times. All bills must be handled properly in order to maintain the integrity and positive image of the chapter. The job requires careful organization and close cooperation with the chapter president. Some of your duties include:

- **Provide the bank with a new signature card.** Immediately upon taking office, complete and forward to the bank a new signature card to authorize withdrawals over your signature, that of the new president and any others the president might designate.
- **Pay bills promptly.** When an invoice is received, both you and the chapter president should review it for accuracy. The president then authorizes payment by initialing and dating the invoices. You should pay bills by check in order to keep a record of all transactions.
- **The chapter must operate on a cash basis not accrual.** Do not use accounts payable or accounts receivable when reporting.
- **Bring petty cash to all general membership meetings and special functions.**
- **Promptly process all moneys received from fees for chapter meetings and other functions properly.** Have attendees sign in and verify that receipts match registrations. Many chapters charge meeting fees for non-members to create an incentive to join. If your meetings involve advance meal guarantees, compare the advanced registration list with sign-up list at the meeting and invoice those who made reservations but did not attend.
- **Confirm that the chapter is under IFMA's group determination policy.** A chapter that has authorized IFMA to file reports on its behalf under the IRS group determination does not have to file a Form 990 separately, but is responsible for state income tax according to state law. It is your responsibility to prepare and file the required forms for state income tax returns.
- **Submit a report of the treasurer's office at board meetings and an annual meeting.** Include a financial statement of incoming cash, checks paid and a correct balance in writing for presentation at each board meeting. Provide an original bank statement at every board meeting.
- **Provide a treasurers report at the annual meeting**

- **Submit financial data to IFMA headquarters for the chapter's annual re-certification.**
- **Should receive the bank statements and do the reconciliation.** The administrator can serve as a co-signer with the treasurer. The treasurer is responsible for adhering to the checks and balances the chapter has established.
- **Do not accept membership applications and/or dues.** Depositing them in your chapter's account for later disbursement to IFMA headquarters is prohibited. IFMA headquarters provides a monthly reimbursement of chapter dues based on new and renewing members from the previous month.

Records and Reports

It is important for you to keep an accurate and complete record of all financial transactions using professional accounting procedures, with regular professional financial supervision. It is recommended that you work with a CPA or have a CPA review financials and tax forms annually or a local audit committee if appropriate.

- At the start of your term, work with the chapter president to prepare a budget for the coming year. This budget should be based on the financial records and experiences of previous administrations and projected programs and activities planned for the year. Submit the budget to the executive committee for approval and recommendation for adoption by the membership, and then monitor that budget closely throughout your term. The chapter's budget must be included in the chapter's annual re-certification.
- Keep complete and accurate records of all financial transactions. Keep a record of all income and expenditures. Make a reconciliation of deposits, expenditures and cash on hand each month. This will provide current information for recording transactions.
- Present a regular verbal and written financial report. This report should be based on your monthly reconciliation of transactions and summarized into a written report to accompany the chapter secretary's report and should be compared with the budget.
- Submit chapter accounts for audit near the end of your term. Prepare a closing financial statement, and submit it to the president, the incoming treasurer if applicable and place a copy of this statement in the chapter's permanent files. A financial report should be presented to the chapter membership at the first meeting of the new term.
- Prepare your successor for office. Transfer all accounts, records and undistributed funds to your successor. Explain the duties of the office, and offer your assistance as the new officer learns his or her duties.

- As the outgoing treasurer you are responsible for completing the chapter's re-certification, however do prepare your successor for the task when they too will need to complete the chapter's re-certification.
- Chapter dues remittance is direct deposited into the chapter's bank account by IFMA approximately the last Tuesday of each month. A dues remittance report will be e-mailed to the chapter's executive board near the end of the month. The deposit and report are for new members and renewals for the previous month.
- Chapter Dues – the chapter can choose to change their dues once a year. There is an application the chapter board must complete and submit to their chapter liaison before March 30 each year. The dues change if approved takes effect on July 1 of the same year.

Guide to Developing a Budget

Use this simple formula for developing your budget.

List all possible expenses:

Membership

- Postage
- Printing
- Supplies
- Web site development and maintenance

Meetings & Programs

- Food and beverage
- Speakers honorarium and gifts
- Facility rental

Golf Outings

- Food and beverage
- Course fees

Educational Seminars

- Food and beverage
- Speakers honorarium and gifts
- Facility rental

Publications

- Newsletter printing and postage
- Directory printing and postage

Administrative

- Administrative fees
- Donations/gifts/community Service
- IFMA conference(s) expenses (including travel)
- Scholarships
- Accounting/legal/re-certification fee

- Conservatively estimate the total number of attendees at chapter meetings and events using historical information as a guide.
- Plan to make a profit on each chapter function.
- Calculate expected expenses and revenue.
- Record your budget, including any changes and final figures, get it approved by the chapter's executive committee and place it in your chapter's permanent files.
- For a chapter budget template contact your chapter liaison.

Chapter Secretary

As secretary, you are the central focus for records and correspondence for your chapter. By keeping clear and accurate records of chapter activities and publications, you can render an invaluable service to your chapter. Among your duties are:

- **Maintain accurate and current records.** These include, but may not be limited to, the membership roster, accurate meeting attendance records and board meeting minutes. Secure a central storage location for all chapter records and forms, including chapter historical documents.
- **Communicate pertinent information to members and officers alike.** Distribute copies of letters, chapter minutes, special information, meeting announcements, invitations, newsletters, etc. in a timely and efficient manner. See that notice is sent at least seven days in advance of all meetings of the chapter and the board.
- **Record and be prepared to read the minutes of chapter, executive committee and board meetings.** Perform roll call and record the attendees of all board meetings. Include in the meeting minutes an accurate record of all motions, amendments and votes. Specify the type of meeting (regular or special), the date, the name of the chapter and the name of the presiding officer. This will become the basis for the chapter's historical record. Do not use tape recorders to record meeting minutes; there are important antitrust implications in doing so. Mail or e-mail typed copies of chapter meeting minutes to IFMA via components@ifma.org.
- **At business meetings, supply the president with a list of action items, unfinished business, announcements and correspondence.** Read the minutes of the previous month's meeting at the next chapter's meeting. When the minutes are approved, record as follows: "Approved as read (or as corrected)" and include the date and your signature. Make sure that chapter meeting and executive committee minutes are transcribed and distributed in a timely manner.
- **Read and become familiar with IFMA's constitution and bylaws and those of your chapter.** The secretary is the custodian of the chapter's constitution and bylaws. A copy of IFMA's constitution and bylaws is available on IFMA's Web site at www.ifma.org.
- **Co-sign all agreements and formal instruments, except those pertaining to the treasurer.**
- **Submit a report of the secretary's office at an annual meeting.**

- **Forward requested materials and information to IFMA.** Communicate regularly with the IFMA Components Team. Submit copies of board meeting minutes, newsletters, bank statements, treasurers reports, chapter master calendar, election reports, etc. for inclusion in the chapter's annual re-certification. This should be sent to IFMA's components team at components@ifma.org on a regular basis.

Reports and Correspondence

- **Provide IFMA Components Team. of officers and committee chairs no later than 10 days following your chapter's elections.** Include the officers' names and all pertinent contact information. This is important to ensure that the new officers are covered in IFMA's Directors and Officers liability insurance.
- **Maintain general chapter correspondence as directed by the chapter president.** Copies of all letters, news releases and other correspondence written on behalf of the chapter should be kept in an orderly file and made available to members upon request. Include a record of chapter programs. This is an important part of your chapter's historical record.

Immediate Past President

Duties

As immediate past president, you are still an active member of the chapter's executive board and have the opportunity to be a valuable asset to the new chapter administration, since you have experience and perspective on chapter operations. Your involvement is invaluable to your chapter's continued success.

- **Advise the executive committee.** As a member of the executive committee, advise and assist newer officers to help prevent mistakes and minimize pitfalls. Oversee the audit of records upon transfer to new officers.
- **Chair the nominating committee.** You chair the committee that recommends candidates for chapter office. Those who do not fulfill their responsibilities in lower offices should not be recommended for higher office. Prepare a list of nominees for office no later than 90 days before assumption of office. The nomination and election process should proceed as directed by the chapter's constitution and bylaws. See Article VI of the Chapter Appendix to the IFMA Bylaws for reference.
- **Report election results to the chapter membership.**
- **Ensure the transfer of "official documents."** When a new chapter president is elected, it is important that the following information is shared with the incoming president.
 - a. Chapter policy manual (template available)
 - b. Chapter financial and account information

- c. Chapter paperwork (incorporation information, Employment Identification Number, etc.)
 - d. Current year chaptewards of Excellence submittal applications and contents
 - e. Current year strategic planning documents/succession plans
 - f. Dues information
 - g. Current calendar and mailing schedule
- **Some chapters have Past President Committees.** Some things past presidents committees could become or focus on are:
 - Historian committee
 - Nominating committee (some can serve on)
 - Anniversary celebrations
 - Audit and Re-certification and end of fiscal year

Warning – there have been issues with some past president committees with some chapters. Be careful that the past leaders serve in an advisory capacity and allow the current and future leaders to fulfill their responsibilities and vision for the chapter.

Chapter Oath of Office

CHAPTER NAME

International Facility Management Association

(The outgoing chapter president or other appropriate professional IFMA member should administer this oath of office at the Chapter meetings where new officers will be taking charge of chapter leadership and business. The new officers should stand together facing the membership with their right hands raised; the outgoing chapter president should recite the oath.)

“I _____ name _____ accept the duties and responsibilities as an officer of the _____ chapter name _____ chapter of the International Facility

Management Association for _____ name of office _____ and will to the best of my ability, execute my duties in accordance with the bylaws, Constitution and Code of Ethics of the _____ chapter name _____ and the International Facility Management Association.”

“Please signify acceptance by saying, “I do”.

New chapter officers:

“I do.”

Directors & Officers Liability Insurance

IFMA holds directors and officers liability insurance coverage (commonly known as D & O) for chapters and councils. Directors and Officers liability insurance is typically written to protect an organization from lawsuits for wrongful acts arising when directors or officers breach their responsibility to represent prudently the interests of their organization.

American international Group (AIG) Insurance Company through Securance Corporation includes IFMA's North American chapters and councils in the coverage for the association's international board of directors. In addition, the company has increased both the scope as well as the limits of liability.

This insurance program is designed to cover chapter and council volunteers, administrative *employees*, and their spouses. Please note that actions by contract administrators are not covered according to the terms of the policy. *We recommend that chapters and councils who have obtained the services of a contract administrator contractually require that person to obtain separate coverage individually or for their company.* The new program differs somewhat from traditional policies in that coverage is now available for any and all volunteers even though they may not actually be serving on the chapter or council's board of directors (i.e. committee and task force members) as well as those volunteer's spouses.

There is no cost to the chapters and councils for this coverage.

Should you have any questions on this insurance program or need contact information for IFMA's insurance agent please contact the components team via components@ifma.org at IFMA.

Securance Corporation Agency (Insurance)

3100 S Gessner, Ste. 225

Houston, TX 77063

Phone: 713-977-6606

Contact: Robert Thomas at bthomas@securancecorp.com



Chapter Committees

Section 4

Committee Structure

Committee chairpersons are appointed by, and serve at the discretion of, the chapter president. For standing committees, a minimum of a one-year commitment is the norm with a possibility of reappointment by the next administration. Although usually given great latitude in how to go about accomplishing assignments, committee chairs typically cannot:

- Appoint new committee members without the approval of the president and/or board of directors;
- Remove any committee member without the approval of the president and/or board of directors;
- Involve the chapter in substantial, long-range financial commitments; or
- Alter chapter policies and procedures.

About Committees

1. Committees are established when it's apparent that issues are too complex and/or numerous to be handled by the entire board.
2. For ongoing, major activities establish standing committees; for short-term activities, establish ad hoc committees that cease when the activities are completed. Standing committees should be included in the chapter bylaws.
3. Committees recommend policy for approval by the entire board.
4. Committees make full use of board members' expertise, time and commitment and ensure diversity of opinions on the board.
5. They do not cut out the responsibility of each board member; they operate at the board level and not the staff level.
6. Committees can meet monthly, every two months or every three months. If meetings are not held monthly, attempt to have committee conference calls during the months between formal committee meetings.
7. Minutes should be recorded for all board meetings and for executive committee meetings.

Committee Chairperson

When you chair a committee, a great deal depends on you. The decisions of your chapter's board of directors are based on the information and recommendations supplied by its committees. Your committee can do a great deal to contribute to the success of the chapter if you provide strong leadership.

Your specific responsibilities include:

- Develop an understanding of the history, purpose and strategic plan of the Association and your chapter and the role your committee plays within the chapter's structure.

- Complete unfinished projects if you are an incoming chair of a standing committee, or become aware of the specific tasks to be performed if you chair a special committee.
- Don't be a committee of one. Committees are purposely designed to tap the abundant resources of the members. Don't overlook what other members have to offer.
- Be a leader and a listener.
- Begin new projects only after consulting with chapter officers.
- Review past committee activities and accomplishments.
- Consult with chapter officers, past and present committee members and IFMA Components Team to establish the committee's goals.
- Periodically evaluate the performance of committee members, individually and as a group, revising procedures and assignments as necessary.
- Develop and hold the interest and enthusiasm of the committee members through orientation, open communication, appropriate assignments, explicit directives, periodic follow up and recognition of effort.
- Notify your committee members of upcoming meetings as much in advance as possible. Provide an agenda and the minutes of the last meeting. Impress upon them the importance of reading the material and coming to meetings prepared.
- Conduct meetings efficiently by following established procedures and a detailed agenda. Provide for free-flowing but orderly discussion, allowing all views to be heard within a reasonable amount of time.
- Facilitate the decision-making process by summarizing what has been discussed at the meeting and moving the committee toward a consensus.
- Work closely with the chapter president or the chapter officer with oversight over your committee. Provide them with meeting minutes and/or committee reports that are accurate, timely and to the point.
- Work within budget for projects.
- Continually recruit new committee members.
- Prepare your successor.

Selecting the Committee

Select your committee members carefully and make it a requirement of the chapter that they become an IFMA member. Choose the members you think have the most to offer in terms of a variety of experiences, interest in the committee, knowledge of the subject, time availability and ability to work with others. Work with the succession management committee and or volunteer coordinator to identify human resources, needs and potential volunteers. After discussing candidates with the chapter president, personally invite members to join your committee. Forward your recommendations to the president for official appointment. Many good people do not volunteer either out of apprehension or lack of knowledge. Most chapters allow members of any classification to serve on most committees.

The usual rule of thumb is one committee per member. Members, even highly involved ones, who serve on multiple committees, may dilute their effectiveness. Of course, this is a luxury that may depend upon the size of your chapter and the number of interested volunteers. Committee members usually are asked for a one- or two-year commitment with the option of reappointment.

The size of a committee is dependent upon the size of the chapter and will vary with its responsibilities and amount of volunteerism. The general size range is four to eight members. Larger committees may be needed for some areas, but smaller ones usually reach consensus and take action more quickly. Remember, in some areas such as member recruitment and retention, the entire chapter should be considered *de facto* members.

Your committee meetings will be most productive if members have a clear understanding of their responsibilities and duties before the meeting takes place. Brief them on your expectations and put them to work. Give them assignments of increasing responsibility and complexity. Don't be afraid to delegate responsibilities, set deadlines and expect results. Most importantly, make sure that your committee members are recognized and appreciated for their efforts and time commitment. Committee work should be task focused.

Types of Committees

The following descriptions are intended to portray various functions that are often conducted by board committees. Note that the following list is not intended to suggest that all of these committees exist within the chapter; it is ultimately up to the board to determine which committees should exist and what they should do for the organization. Committees and their assignments are often specified in the chapter bylaws.

Many chapters will be comprised of a number of both standing and ad hoc committees. Standing committees are established in the bylaws and have an ongoing responsibility to act and advise in a number of special areas, such as

membership, education (programs, certification), communications (newsletter, web), etc.

Ad hoc committees, or task forces, are established for a specific project such as an awards banquet or fundraiser. Once the work is completed, the committee is disbanded.

Standing Committees

The following lists standing board committees - committees that exist year round. Note that the following list is not intended to suggest that all of these committees should exist; it is ultimately up to the organization to determine which committees should exist and what they should do.

- Associate Committee**
- Communications Committee**
- Credentialing Committee**
- Education Committee**
- Historical Committee**
- Hospitality Committee**
- IFMA Foundation Chapter Ambassador**
- Membership Committee**
- Newsletter Committee**
- Program Committee**
- Publicity Committee**
- Sponsorship Committee**
- Succession Planning Committee**
- Sustainability Committee**
- Web Site Committee**
- Young Professionals Committee**

Ad Hoc Committees

The following lists are ad hoc board committees or task forces, i.e., committees that exist to accomplish a specific goal/task and then are disbanded. Note that the following list is not intended to suggest that all of these committees should exist; it is ultimately up to the chapter to determine which committees should exist and what they should do.

- Audit Committee (required)**
- Awards Committee**
- Community Affairs Committee**
- Golf Tournament Committee**
- Nominating Committee (required)**
- Special Events Committee**

Standing and Ad Hoc Committees

Audit Committee:

- Plans and supports audit of major functions, e.g., finances, golf tournaments, fundraisers; and
- Reports to the chapter board of directors.

Awards Committee:

- Prepares the chapter's submissions for IFMA's Awards of Excellence; and
- Honors members, and recognizes achievement in professional and chapter activities.

Communications Committee:

- Reports to the board at all meetings;
- Coordinates all communication for the chapter; and
- Coordinates and distributes blast e-mails to all membership as needed.
- Oversees newsletter, publicity, and Web site committees;

1. Newsletter Committee:

- Publishes a hard-copy or electronic chapter newsletter;
- Distributes newsletter to chapter members on a regular basis;
- Includes IFMA headquarters in the distribution of the newsletter;
- Features articles that enhance the membership's knowledge and understanding of the facility management profession;
- Promote interest and enthusiasm for chapter activities;
- Communicates news of and about the chapter's members; and
- Reports to the board at all meetings.

2. Publicity or Public Relations Committee:

- Promotes the chapter and all functions hosted by the chapter;
- Prepares and distributes press releases and media advisories on chapter activities to the local media; (can contact IFMA for a local media contact list)
- Supplies IFMA with any promotional material developed; and
- Actively researches ways to publicize the IFMA name and the FM profession.
- Coordinates chapter social networking presence such IFMA's Online Community, Face book, LinkedIn, Twitter and YouTube

3. Website Committee:

- Develops and maintains the chapter Web site;
- Includes link to IFMA headquarters site-especially for membership information;
- Follows IFMA website guidelines.
- Reports to the board at all meetings.

Community Affairs Committee:

- Assists chapter in developing community involvement.

Education Committee:

- Oversees Credentialing and Programs Committees; and
- Reports to the board at all chapter meetings.

1. Credentialing Committee:

- Promotes the CFM, FMP and SFP designations
- Coordinates study sessions
- Coordinates mentoring program

2. Program Committee:

- Develops educational programs pertinent to facility management.
- Promotes educational programs pertinent to facility management.
- Plans the program time, location and logistics (meals, set-up, and A/V needs).
- Meets with speaker(s) to coordinate the program.
- Submits program promotional material to web site, and/or newsletter/communication committees.

Golf Tournament Committee:

- Responsible for coordinating annual chapter golf tournament; and
- Plans budget and reports to the board.

Historical Committee:

- Maintains chapter historical records;
- Catalogs and keeps a record of all chapter information;
- Sends copies of all records to IFMA headquarters for chapter files; and
- Ensures historical records are handed off to next committee chair, which includes but is not limited to:

| | |
|-------------------|---------------------|
| Financial records | Strategic plan |
| By laws | Re-certification |
| Constitution | Awards submittals |
| Vision | Banking information |
| Mission | Officer/elections |

IFMA Foundation Chapter Ambassador:

- Participate in chapter level fundraising activities for the foundation, consistent with the vision and strategy of the IFMA Foundation and its Board of Trustees.
- Develop an action plan for the chapter and coordinate activities with the regional IFMA Foundation liaison if available in your region.
- Receive up to date information regarding foundation activities from the regional IFMA Foundation liaison as well as the regional IFMA Foundation liaison chair, where applicable, and communicate them to the chapter leadership / chapter members to increase awareness of the foundation and its activities. If there is no regional IFMA Foundation liaison, please contact the IFMA Foundation.

- Coordinate with the regional IFMA Foundation liaison and/or the regional IFMA Foundation liaison chair to acknowledge and recognize individual, company, chapter, and other support.
- Coordinate with the regional IFMA Foundation liaison or IFMA Foundation directly, if none exists in your area, to develop and coordinate fundraising activities in conjunction with World Workplace, in particular, the foundation events at World Workplace.
- Make presentations at chapter meetings on behalf of the IFMA Foundation.
- Participate in regional IFMA Foundation liaison conference calls.
- Share feedback from the chapter level to the Regional IFMA Foundation Liaison and/or the Regional IFMA Foundation Liaison Chair.
- Provide ideas for research and educational activities to the regional IFMA Foundation liaison and/or the regional IFMA Foundation liaison chair.

Membership Committee:

- The primary responsibility for the Membership Committee is membership growth and retention;
- Prepare a strategy to retain members;
- Prepare a strategy to identify and attract prospective members while retaining current members;
- Communicate the benefits and advantages of membership in IFMA and in the chapter;
- Reports to the board at all meetings;
- Instructs and supports prospective members in the process of becoming a member;
- Ensure there is an adequate supply of membership applications and information available at all chapter functions;
- Welcomes new members;
- Participates in IFMA headquarters listserv.
- Orients new members.
- Oversees Hospitality Committee.

1. Hospitality Committee:

- Welcomes new members, potential members, and guests at all functions;
- Welcomes and introduces new members to the chapter officers and committee chairs;
- Responds to personal and professional events in members' lives; ensures that "cliques" do not develop; and
- Reports to the board at all chapter meetings.

Nominating Committee:

- Chaired by Immediate Past President.
- Must have minimum of three active members on the committee
- Identifies needed board member skills, prepares slate of officers and oversees election process according to bylaws preparing and distributing ballots, tallying votes and announcing winners.

Special Events Committee:

- Plans and promotes holiday and other social events for the chapter.

Sponsorship Committee:

- Develops and coordinates a sponsorship program for the chapter;
- Actively recruits potential sponsors;
- Markets sponsorship opportunities;
- Lists benefits clearly;
- Ensures all benefits are given; and
- Supplies IFMA headquarters, via Components team, with a copy of sponsorship program and benefits.

Strategic Planning Committee:

- Develops a three to five year long-range strategic plan to enhance the ability of the chapter leadership to serve its members;
- Utilizes IFMA's strategic planning process for chapters;
- Sends copy of completed strategic plan to IFMA for chapter records; and
- Provides copy of the strategic plan to the Historical committee for chapter records. IFMA offers facilitation of the strategic plan process.

Succession Planning Committee:

- Review and use the Succession Management Tools and Resources available online in Chapter and Council Leader Tools and Resources
- Identify a Volunteer Coordinator
- Actively engage members in chapter volunteering
- Develop clear position descriptions, expectations, and time commitments for all volunteer positions
- Identify organizational needs
- Identify the talent pool
- Nurture and recognize volunteers

Sustainability Committee:

- Provide guidance and present a united front for chapter sustainability activities;
- Act as advocate for chapter and member sustainability initiatives;
- Initiate chapter events regarding sustainability;
- Organize sustainability-related educational presentations including instructional seminars and webinars;
- Prepare materials for web site and newsletters;
- Track local legislation for sustainability mandates that will affect the profession;
- Keep up with trends in the sustainability arena and report accordingly;
- Stay consistent and true to the ethics and purposes of IFMA and the chapter.

Young Professionals/Emerging Leaders Committee:

- Organizes events for younger members/members new to the profession
- Considers and recommends chapter services specifically for this group to the Chapter Board
- Develops opportunities for mentoring
- Keeps informed about activities of IFMA's young Professional Committee
- Promotes YP events at World Workplace and Facility Fusion

Holding Successful and Productive Committee Meetings

Before each committee meeting, prepare an agenda and send a copy to all committee members early enough to allow sufficient time for them to make plans to attend and prepare for the meeting. The agenda should include all topics of discussion as well as the date and starting and adjournment times. Background material may be included.

Meeting Preparation

1. What is the purpose and objective of the meeting? The desired outcomes?
2. Is a meeting necessary?
3. Who should attend?
4. What is the make-up of the group and their likely chemistry?
5. What is the agenda content and topic flow?
6. What is the meeting environment?
7. Has the appropriate structured pre-work been assigned?

Tips for Working with Groups

- **Don't neglect the physical setting.** Make sure the meeting is on neutral ground, that the room is quiet and without distractions. The room should also be well ventilated and well lit.
- **Don't let the committee get too large.** As the size of a group increases, quiet members may become even more reticent, and it becomes more difficult to give proper recognition to individual contributions. Eight members is usually considered the upper size limit for a working group.
- **Pay attention to seating arrangements.** Ideally, everyone should be able to see everyone else. Some other things to consider when planning seating arrangements are:
 - **Face-to-face seating facilitates opposition.** Be careful who is seated across from the chairperson as this person may confront him or her.
 - **Side-by-side seating makes disagreement difficult.** Seating a friendly member next to an antagonistic one can dilute confrontation.

- **Begin and end the meeting with an idea that unites the group.** This creates an atmosphere of goodwill. If the group does not reach a decision by the end of the meeting, refer to past accomplishments as a reaffirmation of its ability.
- **Plan your agenda carefully.** Place items requiring mental energy, bright ideas and clear heads high on the agenda as the early part of a meeting tends to be more lively and creative than the end of the meeting.
- **Hold back on significant or controversial items until other business is out of the way as these items may take a great deal of time to resolve.** The built-in interest of these items will ensure lively discussion even toward the end of the meeting.
- **Handle conflicts carefully.** When a conflict of ideas becomes a clash of personalities, turn to a neutral member to diffuse the confrontation.
- **Enlist the opinions of all participants.** From new members to the most senior.
- **Choose the strongest advocates to champion a project or cause.** They will work the hardest to prove the solution correct.
- **Get a verbal commitment from each participant.** This commitment, made in front of the group, leads to a greater degree of follow through.
- **Do not ignore the social dimension of a work group.** Be sure to schedule an appropriate number of refreshment breaks.
- **Recognize the members who worked hard and accomplished their objectives.** Always remember that you are working with volunteers for whom recognition is the only tangible reward.
- **Don't be afraid to try something new.** It may work for the current situation.

Nominating Committee

Per IFMA Chapter Appendix to Bylaws:

Nominating Committee Procedure: A Nominating Committee chaired by the Immediate Past President shall prepare a list of qualified nominees no later than 90 days before the above assumption of office date. This list shall provide at least one name for each elective position on the Board and shall be presented to the chapter not later than the regular meeting 60 days before the assumption of office date. At this time, qualified voting members may present nominations from the floor.

Elections shall be made by written ballot delivered in a manner chosen by the committee to the qualified voting members. The Nominating Committee shall prepare the ballot, which shall include the original list of nominees and those nominated from

the floor. Write-in space for each office shall be included in the ballot. Each qualified voting member of the chapter shall be provided with a ballot at least four weeks prior to the ballot count date as set by the chapter Board of Directors. Ballots shall be returned in the manner and timeframe specified by the Nominating Committee.

Tabulation: The Nominating Committee chaired by the Immediate Past President shall designate the method of validation and counting of ballots. A plurality shall elect to office. In case of a tie, the election shall be determined by lot. Results shall be reported to the members by the Chapter's Immediate Past President.

The chapter Secretary shall immediately notify the Association's President of the results of chapter elections of Officers and Directors, including a complete listing of the Chapter Officers and Directors for the coming year with their addresses and phone numbers.

Chapter officers, committee chairs and committee members are **required** to be members of IFMA and the chapter.

Below is a suggested timeline for the nomination, election and installation of chapter officers.

Chapters that change in July

January – Chapter board of directors should appoint a Nominating Committee of at least three members, chaired by the immediate past president.

February – Nominating committee should prepare a list of qualified nominees. Board of Directors should set dates for ballots to be distributed, ballot count and announcement of election results.

April – Committee should present a list of nominees to the Chapter membership. Qualified voting members may present nominations from the floor.

May – Committee should prepare the ballot.

June – Distribute ballots to all qualified voting members (must be at least two weeks prior to the ballot count date).

Announce election results (must be at least 15 days prior to officer installation).

Send new officer list with addresses and phone numbers to IFMAs.

Have instillation ceremony.

Chapters that change in January

August – Chapter Board of Directors should appoint a Nominating Committee of at least three members, chaired by the Immediate Past President.

September – Nominating committee should prepare a list of qualified nominees. Board of directors should set dates for ballots to be distributed, ballot count, and announcement of election results.

October – Committee should present a list of the nominees to the chapter membership. Qualified voting members may present nominations from the floor.

November – Committee should prepare the ballot.

December – Distribute ballots to all qualified voting members (must be at least two weeks prior to the ballot count date).

Announce election results (must be at least 15 days prior to officer installation.
Send new officer list with addresses and phone numbers to IFMA.
Have installation ceremony.

Developing Committees or Task Forces

1. Ensure the committee has a specific charge or set of tasks to address, and ensure board members understand the committee's charge.
2. Have at least one board member on each committee.
3. Board members should only serve on one to two committees at a time.
4. In each board meeting, have each committee chair report the committee's work since the prior board meeting. These may be presented in written format in order to expedite meetings.
5. Consider having the chapter administrator (where appropriate) participate in committee meetings.
6. Committee chairs are appointed by the chapter president; consider asking committee members to volunteer for committee chair. Allow for new committee chairs each year. While the individuals experience and knowledge may be valuable, it does tend to make a chapter stagnate when they have the same people every year performing the same responsibilities.
7. The chapter president should serve as ex-officio to any relevant committees



IFMATM

International Facility Management Association

Empowering Facility Professionals Worldwide

Chapter Membership, Growth & Retention

Section 5

Chapter Membership Chairperson

As the chair of your chapter's membership committee, you have the primary responsibility for membership growth and retention. There are a number of basic tasks that are incumbent upon you for a successful term; the methods for accomplishing them are limited only by your imagination.

- **Oversee the processes of serving the membership and maintaining members.**
- **Keep membership and guest mailing lists accurate.** Utilize the online chapter reports and work with IFMA staff as appropriate.
- **Prepare a strategy for building new membership.** Working with the chapter president and the Components team at IFMA determine how your chapter can attract prospective members. Contact IFMA Components about any association-wide membership activities and encourage your members to participate.
- **Hold a membership recruitment contest within your chapter.**
- **Network within the association.** Get to know your counterparts in other chapters and their membership ideas. Review the Awards of Excellence entries of chapters with winning membership programs. Utilize the online chapter leader community. Contact IFMA's Components Team for ideas and best practices.
- **Search actively for prospects and follow up with inquiries quickly.** Network with fellow members, vendors and friends in the profession to identify new businesses in the area, existing businesses with new FM personnel or ones that have never been represented in your chapter. Contact the local Chamber of Commerce and utilize the Corporate Sustaining Partners list from IFMA's website. Those who take the initiative to contact IFMA are obviously motivated to join, so respond promptly with an application, an invitation to your next function and a genuine interest in them before their interest in IFMA has a chance to fade. Supply the IFMA Components Team with the prospect list and place on your chapter's mailing list.
- **Greet members and guests at every meeting or event.**
- **Make guests at chapter functions feel welcome, and encourage them to join.** Ask for business cards from all guests. Introduce guests to members. Assign a mentor to new or potential members. Encourage each guest to join the association. Have the president recognize guests and give them distinctive nametags that identify them. Always keep an adequate supply of

membership applications and other IFMA literature on hand and display at every meeting.

- **Discuss having an IFMA orientation as a chapter function with your program chair, request PowerPoint presentation from the Components Team.** Follow up with a letter within two weeks of the visit personally inviting them to the next meeting or function. Monitor attendance for frequent “personal guests”; your chapter may wish to develop a policy regarding how many meetings a person may attend without joining. Note: most chapters have different meeting fee schedules for members and non-members, with members receiving a discount.
- **Develop a new member packet.** Include such materials as a nametag, calendar, website address, the latest chapter newsletter, chapter pin, , chapter board and committee contacts, chapter mission and vision, and personal letters from the chapter
- **Make every effort to retain the members already in your chapter.** Members will stay in your chapter when there are interesting and varied programs, professional growth, a friendly atmosphere, opportunities for involvement, recognition of achievements and enthusiastic leadership. Show interest in the members and they will maintain their involvement. Follow up with members who have failed to renew their memberships. See IFMA’s retention process in the IFMA section of this manual.
- **Encourage members to participate in all functions.** In surveys, IFMA members consistently list networking as the most valued benefit of their membership. Those not participating in your meetings or other informational opportunities are missing out on this benefit and may be at risk of dropping out. Compare attendance lists to your membership roster and contact those whom you have not heard from recently to let them know they are missed. If your resources and the chapter’s size permit, have your committee call each member to remind them of an upcoming event.
- **Use IFMA resources to stay informed.** Read the regular reports provided by IFMA for information on new members, membership changes and members at risk of being dropped. Read IFMA’s *FMJ*, *The Wire* and chapter leader email updates. Attend leadership training events, utilize IFMA’s website, attend Facility Fusion volunteer leader track sessions and network with your counterparts in other chapters for ideas and inspiration. Utilize the online reports for retention.
- **Contact chapter support staff for assistance.** The Components Team is available to assist you with basic chapter operations questions, chapter reports, leader’s teleconferences, chapter re-certification, etc. IFMA’s Members Services Team processes all applications, renewals, membership

updates, returned mail, etc and you can contact them regarding specific applications, renewals etc. via ifma@ifma.org

- **Attend chapter leader webinars with IFMA headquarters.**

Membership Dues and Fees

A completed membership application must be submitted in order for a new member to be accepted into the Association. The membership is then renewable each year on the anniversary of the date the application was approved by the association.

Remittance of chapter dues is done on a monthly basis to most chapters. European chapters receive this quarterly. This remittance reflects the total dues income from the previous period. All remittance will be held for failure to file chapter re-certification. Chapters have the option of charging additional fees, in addition to the association dues listed below for customization/localization of benefits and services. The fee-for-services option provides flexibility for chapters seeking to enhance their member benefits or add new benefits. Chapters must submit their fee-for-services request by March 1. Once approved, fees may be adjusted once a year and go into effect July 1.

| Classification: | Association Dues (U.S.) * Base Membership |
|---|---|
| Member | \$179 |
| Associate | \$179 |
| Student | \$10 |
| Retired | \$100 |
| Young Professional | \$99 |
| FMJ mailed: \$42 | |
| Council Membership: \$55 per council | |
| Communities of Practice: \$25 per community | |

* Membership dues payable in U.S. funds. Non-U.S. members may pay equivalent dues in their local currency.

*** Refer to www.ifma.org for current chapter dues.

New Member Resources

Once a new member's name is entered into the association's official record, they immediately have access to the member's only section of www.ifma.org. New members also receive a welcome email from the association including their login and password.

1. Retention starts within minutes with an immediate e-mail to the new member. The e-mail includes information on benefits and how to access benefits on-line.
2. An e-mail entitled "How are you doing?" is sent to members in their 6th month of the membership year. This e-mail asks for any feedback or suggestions.
3. First notice invoices for membership dues are mailed two months prior to the members paid thru date. For example in January, first notices are sent to members who are paid thru March 31.
4. Second notice e-mails for membership dues are sent one month prior to the member's paid thru date. For example in February, second notice emails go out for members who are paid thru March 31.
5. Third notice e-mails for membership dues are sent the second week of the same month of the member's paid thru date. For example during the second week of March, reminder emails are sent to people who are paid thru March 31.
6. Retention calls are made to all members that have not renewed their membership by their paid thru date. A list is run on the 2nd of the month of all members that did not renew by the previous months paid thru date. For example on April 2nd, a list is run of all members that are paid thru March 31. That list is forwarded to ComNet. ComNet is an outside marketing firm that has the telemarketing capabilities to make multiple attempts and almost guarantee actual contact with our members. Their auto-dialer will make at least 10 attempts to catch our members at their desk before they leave a voice mail message as a last resort. ComNet either, takes the renewal over the phone and offers a free publication to any member that renews at that time over the phone, finds out if the member intends to renew and if they need an invoice sent to them, or if the member has decided that they will not renew, ComNet asks for the reason that they have made this decision.
7. Final notice e-mails for membership dues are sent the second week of the month after of the member's paid thru date. For example during the second week of April, reminder emails are sent to people who are paid thru March 31.
8. Members that have not renewed or that are not in process of renewing are dropped approximately seven weeks after the membership has expired. A Membership Expiration of Membership and Exit Survey e-mail is sent to all members who are dropped. For example on May 25, the email is sent to members who are paid thru March 31.
9. "We Want You Back Letter." This letter is e-mailed to professional members whose memberships expired 5 months ago and one year ago and asks the former professional member to rejoin IFMA.

Retention Tips:

Have response letters ready. IFMA Components Team can assist you in developing these letters. See the chapter letter templates at the end of this section. Types of letters you should consider preparing should include:

- A cover letter to accompany an application for prospects who contact you directly
- A letter to a prospect whose name was submitted by a current member
- A letter to a guest who attended a chapter function
- A follow up to a mailing from IFMA headquarters generated by the prospect's request
- New member welcome

Have a member of your committee assist at the meeting registration table to identify non-members as they arrive.

Publish the names and phone numbers of membership committee members in the chapter newsletter and/or website and encourage members to contact them with referrals. Have referral cards available at chapter meetings.

Work with the program committee to develop a "bring a friend" meeting where members who bring a non-member get in free or some other incentive is provided.

Plan an extended membership campaign with advertising, prizes and recognition or partner with an IFMA membership campaign. Contact the Components Team for information on any current campaigns.

Publish a chapter benefits brochure – template available in the component leaders section of the website.

An annual membership contest, campaign or drive is recommended. The contest should be imaginative and exciting in order to hold the interest of the members whom you must turn into active contestants in order for the program to succeed. While the content of a campaign may vary immensely based on available resources there are some basic steps to consider:

- **Build up the prospect list for your chapter using all available sources.**
- **Assemble a campaign committee and determine a budget.**
- **Decide on a campaign name or theme.** It should be catchy and easy for your members to identify with and remember.
- **Make the contest rules uncomplicated and comprehensive.** People are apt not to participate in something they do not understand. Have the rules cover all the scenarios you can think of, but add a disclaimer that conflicts will be resolved by an impartial third party to deal with the unanticipated.

- **Be imaginative.** Mail prospects a penny “for their thoughts,” or a string to tie around their finger to remind them to come to the next meeting. Make sure your promotional pieces are in keeping with the dignity and image of the association, but do not be afraid to use humor.
- **Have more than one prize.** If one member runs away with the contest early on, others may be discouraged from competing. Multiple prizes ensure that more people have a chance to win. Also, consider giving away a prize by raffle with any member reaching a pre-determined level eligible in addition to prizes for top performers.
- **Publicize the contest well before it begins so that participants are familiar with its conditions and ready when it gets under-way.** But do not advertise it too far in advance as some members may “sandbag” by withholding prospective members to better their chances in the contest, which is a disservice to both the prospect and the chapter.
- **Make it easy for prospects to respond.** Design promotional items to make a direct sale. Include a membership application form; it is the easiest way for an interested prospect to say yes. Encourage a response of any kind.
- **Issue regular progress reports so that contestants can track their standing in the campaign and questions can be resolved before the conclusion.**
- **If the campaign covers an extended period of time, consider interim prizes at various intervals to maintain interest and awareness.**
- **Issue a final report at the end of the campaign.** Make sure that top performers are recognized and rewarded and thank everyone who participated, especially the committee that organized and conducted the campaign. If the campaign meets or exceeds its goals, advise IFMA’s component team for association-wide publicity. If it falls short of its goals and/or exceeds its budget, conduct a thorough post mortem to identify elements that should be changed to increase the likelihood of future success.
- **Celebrate all successes.** Recognize members who sponsor new members. List them on the Web site and/or newsletter.
- **Follow up is necessary after the campaign.** Some prospects will be favorably inclined toward joining the association, but will be hesitant when it comes to actually signing up. Don’t let their interest lapse.

It is important that you and your volunteers have a good working knowledge of the benefits and advantages of membership in IFMA and in your chapter. Volunteers also should know common resistances that will be offered by prospects and how to overcome them. Marginal prospects can be turned into members with reasonable persistence by bringing the advantages of membership to their attention.



Professional Development & Credentialing

Section 6

Chapter Professional Development Chair

In your role as professional development chair, you will work closely with your chapter's leaders to develop the critical monthly functions that define your chapter. You will oversee the educational programs and tours for your chapter, as well as professional development. Your job is to inform, educate and entertain your members, who are your customers. There are a variety of measures you can take to ensure a successful term in office.

- **Learn your chapter's needs and wants and plan ahead.** Chapters should plan an educational calendar with at least a skeletal list of programs for the coming year. Plan an annual program of membership meetings for the year and present it to the board for comment and approval. Follow the professional development vision and philosophy of your chapter.
- **Poll your members for their program preferences.** Sample surveys are available from IFMA contact the components team for copies. There are a variety of inexpensive or free online survey options that are very user friendly.
- **Publicize your programs.** Publish an educational calendar and notices of each meeting well in advance. This is especially important for chapters that meet at varying times and/or places from month to month. Make sure that inevitable changes to the schedule are publicized thoroughly to avoid confusing and angering your members. Inform the local media and related associations about your meetings. Many chapters have a public relations committee to handle these duties. Publicize to members as well as to your chapter's potential members. Make sure announcements have the date, time and place and identify the chapter correctly. Keep the chapter Web site up-to-date. Include the benefit of attending – what the attendee will take away from the meeting on all program announcements.
- **Coordinate the logistics of all meetings and programs.** Schedule the meeting location as far in advance as possible. Coordinate site, catering and any other special arrangements for each program. Provide audio/visual equipment or any other materials needed for the program presentation or requested by the speaker.
- **Coordinate and plan a CFM Exam Prep Workshop™ and/or study group for interested members.**
- **Coordinate and plan for best practices/benchmarking sessions with interested members.**
- **Emphasize networking as well as education.** In surveys IFMA members consistently rate the opportunity to network with their fellow professionals as

the most highly valued benefit of membership. Your chapter was chartered to provide information and professional development services to its members. While strong educational programs are the backbone of fulfilling this charter, make sure to allow ample social time for members. This time also is important for making new and prospective members feel welcomed.

- **Network within the Association.** Get to know your counterparts in other chapters and their program ideas. Ask to be placed on their distribution lists for meeting announcements, etc. Review the Awards of Excellence entries of chapters with successful programs. Contact IFMA's Components Team. Attend chapter leader education teleconferences.
- **Provide variety.** Reserve at least a couple of meeting slots for programs other than standup presentations on a single subject. Facility tours are popular, as are presentations by local dignitaries or celebrities. Work with your chapter's membership chair on a prospective member orientation meeting, bring-a-friend meeting, a bring-your-boss meeting or some similar function. You may also consider sporting events, golf outings, cruises or other social events. Note, however, that extraordinary functions may require an additional insurance rider. Contact IFMA Components Team with any questions.
- **Develop contacts with individuals and groups outside of your chapter.** You can bring greater diversity to your programs and satisfaction to your members if your chapter is a part of the broader community. Get to know your counterparts within civic groups and other local associations. Consider joining with nearby IFMA chapters and/or local chapters of related associations to conduct programs that would be beyond the capacity of your chapter alone.
- **Advertise that the chapter's programs qualify for CFM® Maintenance Points.**
- **Encourage/Persuade chapter members to attend all IFMA conferences and events.**
- **Encourage chapter members to explore the FM Knowledge Center, IFMA's online learning resource.** IFMA's FM Knowledge Center features competency course modules developed from the eleven facility management competencies and performance skills, as well as workshops and FM resources. Designed by IFMA-recognized FM professionals, our course modules can help: CFM candidates fill educational gaps; FMP® (Facility Management Professional®) certificate holders expand their knowledge base; and Professionals in related fields obtain valuable Continuing Education Units. Each course is formatted for self study, with an IFMA-approved instructor "on call" to take questions and share real-world experience. All IFMA self-study course modules are approved for Continuing Education Units

(CEU). Learners may print course completion certificates and will have 24-hour access to course completion records.

- **Partner with IFMA on an expanded educational program.** From one-day to four-day programs, IFMA makes its extensive menu of world-class programs and speakers available for local presentations. IFMA staff is available to answer any questions you may have in planning your event. IFMA recommends that chapters have the IFMA components team review contracts prior to the chapter signing.

Tips on Handling Program Presenters

Here are a few things to keep in mind when selecting, preparing and accommodating program presenters.

- **Select a speaker with verifiable knowledge of a topic of interest to your members as well as the ability to present it.** If possible, check references from past speaking engagements to ensure that a prospective speaker can perform as advertised. Get information not only on the speaker's competence in the subject matter at hand, but also on his or her skills as a presenter. A dull speaker, however well-informed, can make for a highly forgettable meeting. Also, let the speaker know what kind of audience to expect and the type of program expected by the audience.
- **Use "in-house" talent as much as possible.** Your own members do interesting and noteworthy things every day. Tap this readily available resource while keeping the above admonition in mind. Consultants and vendors also have much information to share. While they will inevitably make reference to their own experiences and products in a presentation, impress upon them the need to minimize commercialism and avoid the appearance of endorsing a particular product or service. It is also great practice for members needing to practice presenting/public speaking.
- **Schedule the speaker well in advance and confirm the engagement in writing.** Follow up by phone or e-mail a few days prior to the meeting and reconfirm the date, time, location, etc., as well as pick-up and drop-off arrangements and any other courtesies that are needed.
- **Confirm any requirements for room set-up and audio/visual needs in advance and make appropriate arrangements.** Check with officials at any physical meeting site to verify that they can meet the speaker's needs.
- **Review any financial arrangements with the speaker in advance.** Make sure that there is a mutual understanding of any fees and expenses to be paid by the chapter, that they fall within your program budget and that they

are approved by the chapter's officers. A confirmation letter or e-mail is a good opportunity to state these particulars in advance and in writing.

- **Have meeting attendees rate the speaker for future reference.** Place evaluation forms on chairs prior to the meeting and encourage attendees to hand them in at its conclusion. Use the form as an opportunity to rate not only the speaker, but also the topic, meeting facility, time, location, audio/visuals and food service to keep current on your members' views.

Chapter Credentialing Chair

The purpose of the chapter credentialing committee, or credential chair, is to promote IFMA credentials to chapter members and to local professionals as well as encouraging members to sit for the CFM exam or to obtain the SFP or FMP credentials. Depending on the size of the chapter, the Credentialing committee may be a sub-committee of the professional development committee. A complete CFM, SFP and FMP program will include the following components: visibility, recognition, recruitment and support.



CFM® – IFMA's Certified Facility Manager®

The most respected global credential in facility management.

Visibility

Ensure that the CFM credential and program are visible within the chapter.

- Have a section on certification on your Web site. Visit the following chapter Web sites for ideas: www.ifmagny.org ; www.ifmaatlanta.org ; www.ifma-chicago.org
- Include a link to the IFMA certification section: www.ifmacredentials.org
- Put the link to the online CFM Competency Self-Evaluation Exercise on your Web site. This can be found at ifmacredentials.org/cfm
- Utilize the CFM ads provided by IFMA for your newsletter and Web site.
- Promote chapter study groups.

- Regularly include articles on the CFM program in the newsletter.
- Have brochures available at every chapter meeting. Can get from chapter liaison.
- Assign CFMs to be mentors within your chapter

Recognition Suggestions

Chapter recognition of current CFMs demonstrates the value of the credential to potential CFM candidates as well as to the recipients.

- Publicly congratulate new and renewing CFMs at a chapter meeting. Refer to the chapter's CFM report on www.ifma.org.
- Invite spouses/employers to attend the meeting to see them recognized.
- Ask CFMs to wear special ribbons or name tags to set them apart. Ribbons are available from IFMA headquarters.
- Profile new CFMs in the chapter newsletter and Web site.
- Publish the list of CFMs on the Web site.
- Send press release from chapter to local publications
- Send a personal note of congratulations from the chapter president to new and renewing CFMs (samples are available).
- Plan CFM-only functions such as a breakfast, luncheon, or tour.
- Present recipients with CFM logo memorabilia such as key chains (a variety of products are available through the IFMA bookstore.).
- Invite CFMs to share the value of the credential through testimonials or newsletter articles.

Recruiting New Candidates

Chapter programs to recognize CFMs pay dividends in many areas. One important area is the recruitment of new CFM candidates. Potential candidates see the concrete rewards received by CFMs, and facility professionals who are less familiar with the program are encouraged to seek further information about the credential.

The chapter also needs a plan to identify, recruit and support candidates until they successfully complete the exam. Each chapter operates differently – but walking through the general steps below will help you develop the best plan for your chapter and its members.

- How many of your members appear to be eligible to become CFM candidates? Refer to the [education/experience guidelines](#) in the CFM brochure or online at www.ifmacredentials.org/CFM.
- What percentage of your members have the CFM?
- Set a tangible goal for your chapter based on your research. Do you want 5% of eligible members to become candidates? Or 10%?

- Develop a plan to recruit and support candidates until their successful completion of the exam.

Recruitment and support strategies

- Visibility and opportunity. Whenever possible, have a CFM information table at chapter meetings – with a CFM available to discuss preparing for the exam.
- Ask current CFMs for brief remarks on the value of the CFM at meetings.
- Make sure there are always articles about CFM in the chapter newsletter.
- Recruit individual CFMs to serve as mentors to candidates and advertise their availability at meetings, on the Web site, and in the newsletter.
- Organize a chapter CFM study group based on the needs of your members.
- Consider having the chapter sponsor the CFM Exam Review course.*
- Inform candidates of all candidate support tools available.*

* Please refer to the following section, Candidate Support Tools, for details

Candidate Support Tools

IFMA provides several support tools for CFM candidates. The IFMA Web site provides additional information on each tool.

- **CFM Self-Evaluation** – To evaluate readiness for the exam, download the [Complete List of Competencies](#) . This document gives detailed information about the scope of knowledge and experience covered on the CFM Exam. In reviewing this document, make an honest assessment of your competence and experience in each of the performances
- **Online course modules** – Fill knowledge gaps by taking course modules online that address different competency areas.
- **IFMA FM Learning System™** -. Developed by IFMA and a team of subject matter experts, this program encompasses current knowledge, best practices and trends in facility management, covering all core competencies. In addition to preparing professionals for the CFM Exam, the Learning System is an excellent professional development tool and an indispensable on-the-job resource. The IFMA FM Learning System offers flexible study options that can be tailored to individual learning needs and preferences.
- **CFM Exam Prep Workshop™** – This workshop is designed to assist facility professionals seeking certification with preparation for the competency-based examination. Workshops can be combined with competency areas to tailor a course to your area and members. There is a flexible format and the workshop can be scheduled for one or two days and scheduled as a stand-alone or in conjunction with FM Learning System course. Contact IFMA's Professional Development Department for more information.

Chapter support for CFM Maintenance

To maintain the integrity of the credential, CFMs are required to attain 120 CFM maintenance points every three years in at least two of the following four categories:

- I. Practice
- II. Continuing education
- III. Professional involvement
- IV. Development of the profession

Processing fees

US\$210.00 (member) / US\$265.00 (nonmember)

A detailed list of the many ways CFMs may earn points is on the IFMA Web site at <http://www.ifmacredentials.org> on the [CFM Maintenance Form](#).

Chapters can assist members to maintain the CFM by offering high quality educational programs and providing verification of attendance to the CFM. Valuable maintenance points can also be obtained by taking course modules online.

CFMs also receive a ½ CFM maintenance point for each chapter meeting attended.

Chapter Programs can be utilized for CFM Maintenance Points. The chapter should provide written documentation of participation which can be submitted to document the candidate's attendance. In order to qualify for maintenance points, the program must relate to one or more of the FM competency areas. It is not necessary to get approval of the program for it to qualify towards maintenance points.

CFM® support for IFMA chapters

IFMA is committed to supporting chapter CFM programs. The following resources are available to all chapters.

- CFM brochure in PDF form on the IFMA Web site, <http://www.ifmacredentials.org>.
- Candidate Support Tool – the CFM Competency Self Evaluation. Refer to the Candidate Support Tool section for complete information.
- If you would like to share information on your chapter projects please contact ifma@ifma.org or call the professional development department at IFMA.

- Chapter press release (template available on the Web site)
- CFM power point presentation available upon request. Contact credentials@ifma.org or call the professional development department at IFMA to request.

CFM Leader Activities – Planning Template

July/August

This is your planning time as you gear up for the year.

Identify committee members

- Multiple helpers keep volunteer activities from becoming a burden.
- Who volunteered last year?
- Which chapter CFMs are go-getters?
- Ask them and set up a planning meeting.

Meet with previous chair and committee

- Review last year's program. What worked – what didn't?
- Set annual committee goals and programs.
- Use these goals to set assignments and timelines for committee members.

Sample goals might be

- To have 10% of eligible members become CFM candidates.
- Hold quarterly CFM orientations to familiarize members with the process.
- Contact current CFMs and ask them to serve as mentors.
- A CFM article in every newsletter - ask your CFMs to share why certification is important; have recent CFMs describe the process, etc.
- CFM study sessions – schedule for interested members.
- Web site – make sure certification is visible and current.
- Hold annual recognition event for CFMs.
- Recognize new CFMs at chapter meetings and in the newsletter.
- CFM® presence and visibility at every chapter event – CFM ribbons to identify CFMs
- Send press releases from the chapter for each new CFM.
- Have certification be the topic of a chapter meeting.
- Form a mentoring program for current CFMs to mentor up-and-coming members looking to achieve an IFMA Credential.

Communicate your goals to the chapter

- Meet with professional development and membership committees to synchronize goals and efforts.

- Publish the goals in the chapter newsletter and Web site.
- Discuss them at chapter meetings.
- Print them and have them available on a CFM table (along with CFM brochures) at all chapter meetings.

Newsletter and Web site

- Plan a series of articles on CFM – one for each newsletter.
- Make sure CFM is visible on your Web site. If you don't have a section on certification – talk to the Web master! Provide a link to IFMA's Web site on certification.
- Ask chapter CFMs for testimonials to include in newsletters and on the chapter's Web site.
- Consider including a monthly CFM question and answer in the newsletter.

September - June

Chapter Planning

- Have CFM ribbons for CFM nametags for easy recognition
- Encourage chapter members to ask them about certification
- CFM table with brochures
- Schedule certification as a meeting topic

Newsletter

- CFM article or testimonial or profile of new CFM
- CFM question
- Announce CFM mentor program and give contact information
- Study group info
- CFM self-assessment ad
- CFM quarterly orientation – where and when

Website

- Information on mentors, study groups, etc.

Recognition

- Welcome new CFMs
- Send chapter press release to local newspaper; CFM's company newsletter if appropriate
- Hold recognition event

Candidate Support

- Chapter study group
- Mentors



The FMP® Program- The Facility Management Professional® Designation

Preparing new and transitioning facility professionals for the demands of today's dynamic workplace.

Visibility

Ensure that the FMP credential and program are visible within the chapter.

- Have a section on certification on your Web site. Include a link to the IFMA FMP section: ifmacredentials.org/fmp
- Put the link to IFMA's online courses and IFMA course offerings on your Web site.*
- Utilize the FMP ads provided by IFMA for your newsletter and Web site.*
- Regularly include articles on the FMP program in the newsletter.
- Have brochures available at every chapter meeting.
- Assign CFMs to mentor FMP Candidates within your chapter

* Please refer to the FMP Support section on page 14 of this section for IFMA Chapters for detailed information on these resources.

Recognition Suggestions

Chapter recognition of current FMPs demonstrates the value of the credential to potential FMP candidates as well as to the recipients.

- Publicly congratulate new FMPs at a chapter meeting. Refer to the FMP report available in the Reports on www.ifma.org .
- Invite spouses/employers to attend the meeting to see them recognized.
- Ask FMPs to wear special ribbons or name tags to set them apart.
- Profile new FMPs in the chapter newsletter and Web site.
- Publish the list of FMPs on the Web site.
- Send a personal note of congratulations from the chapter president to new and renewing FMPs.

- Plan FMP-only functions such as a breakfast, luncheon, or tour.
- Present recipients with FMP logo memorabilia such as key chains (a variety of products are available through the IFMA bookstore.).
- Invite FMPs to share the value of the credential through testimonials or newsletter articles.

Recruiting New Candidates

Chapter programs to recognize FMPs pay dividends in many areas. One important area is the recruitment of new FMP candidates. Potential candidates see the concrete rewards received by FMPs, and facility professionals who are less familiar with the program are encouraged to seek further information about the credential. These FMPs are the future leaders of facility management and your chapter, and some will eventually obtain the FMP.

The chapter also needs a plan to identify, recruit and support candidates until they successfully complete the designation process. Each chapter operates differently – but walking through the general steps below will help you develop the best plan for your chapter and its members.

- How many of your members appear to fit into the category of an FMP candidate? Refer to the requirements in the FMP brochure.
- What percentage of your members have the FMP?
- Set a tangible goal for your chapter based on your research. Do you want 5% of eligible members to become candidate? Or 10%?
- Develop a plan to recruit and support candidates until the successful completion designation.

Recruitment and support strategies

- Visibility and opportunity. Whenever possible, have a FMP information table at chapter meetings – with a FMP available to discuss preparing for the exam.
- Ask current FMPs for brief remarks on the value of the FMP at meetings.
- Make sure there are always articles about FMP in the chapter newsletter.
- Recruit individual FMPs to serve as mentors to candidates and advertise their availability at meetings, on the Web site, and in the newsletter.
- Consider having the chapter sponsor courses toward the completion of the FMP.*
- Inform candidates of all candidate support tools available.*

* Please refer to the following section, Candidate Support Tools, for details.

Candidate Support Tools

IFMA provides several support tools for FMP candidates. The IFMA Web site provides additional information on each tool.

- **FMP Self Study Program**- offered in a flexible learning format, these courses help FMP participants meet program requirements, and acquire the FMP credential. Learn more at ifmacredentials.org/fmp
- **FMP Instructor Led Courses**-these courses are offered at IFMA Headquarters and other events throughout the year and are also offered by IFMA chapters. Successful completions of these courses allow candidates to apply for the FMP credential. The course calendar can be found at ifma.org/professional-development .

FMP support for IFMA chapters

IFMA is committed to supporting chapter FMP programs. The following resources are available to all chapters.

- FMP brochure in PDF form on the IFMA Web site. Go to ifmacredentials.org/fmp
- Monthly program updates through C3..
- Publicize chapter projects through C3. If you would like to share information on your chapter projects please contact ifma@ifma.org or call the certification department at IFMA.
- FMP power point presentation available upon request. Contact ifma@ifma.org or call the certification department at IFMA to request.



The SFP™ Program- The Sustainability Facility Professional® Designation

Optimize facility management performance for a better tomorrow

Visibility

Ensure that the SFP credential and program are visible within the chapter.

- Have a section on certification on your Web site. Include a link to the IFMA SFP section: <http://www.ifmacredentials.org/sfp>
- Put the link to IFMA's online courses and IFMA course offerings on your Web site.*
- Utilize the SFP ads provided by IFMA for your newsletter and Web site.*
- Regularly include articles on the SFP program in the newsletter.
- Have brochures available at every chapter meeting.
- Assign SFPs to mentor SFP Candidates within your chapter

* Please refer to the SFP Support section on page 14 of this section for IFMA Chapters for detailed information on these resources.

Recognition Suggestions

Chapter recognition of current SFPs demonstrates the value of the credential to potential SFP candidates as well as to the recipients.

- Publicly congratulate new and renewing SFPs at a chapter meeting. Refer to the SFP report available in the Reports on www.ifma.org.
- Invite spouses/employers to attend the meeting to see them recognized.
- Ask SFPs to wear special ribbons or name tags to set them apart.
- Profile new SFPs in the chapter newsletter and Web site.
- Publish the list of SFPs on the Web site.
- Send a personal note of congratulations from the chapter president to new and renewing SFPs.

- Plan SFP-only functions such as a breakfast, luncheon, or tour.
- Present recipients with SFP logo memorabilia such as key chains (a variety of products are available through the IFMA bookstore.).
- Invite SFPs to share the value of the credential through testimonials or newsletter articles.

Recruiting New Candidates

Chapter programs to recognize SFPs pay dividends in many areas. One important area is the recruitment of new SFP candidates. Potential candidates see the concrete rewards received by SFPs, and facility professionals who are less familiar with the program are encouraged to seek further information about the credential. These SFPs are the future leaders of facility management and your chapter, and some will eventually obtain the SFP.

The chapter also needs a plan to identify, recruit and support candidates until they successfully complete the designation process. Each chapter operates differently – but walking through the general steps below will help you develop the best plan for your chapter and its members.

- How many of your members appear to fit into the category of an SFP candidate? Refer to the requirements in the SFP brochure.
- What percentage of your members have the SFP?
- Set a tangible goal for your chapter based on your research. Do you want 3% of eligible members to become candidate? Or 5%?
- Develop a plan to recruit and support candidates until the successful completion designation.

Recruitment and support strategies

- Visibility and opportunity. Whenever possible, have a SFP information table at chapter meetings – with a SFP available to discuss preparing for the exam.
- Ask current SFPs for brief remarks on the value of the SFP at meetings.
- Make sure there are always articles about SFP in the chapter newsletter.
- Recruit individual SFPs to serve as mentors to candidates and advertise their availability at meetings, on the Web site, and in the newsletter.
- Consider having the chapter sponsor SFP courses.*
- Inform candidates of all candidate support tools available.*

* Please refer to the following section, Candidate Support Tools, for details.

Candidate Support Tools

IFMA provides several support tools for SFP candidates. The IFMA Web site provides additional information on each tool.

- **SFP Self Study Program**- offered in a flexible learning format, these courses help SFP participants meet program requirements, and acquire the SFP credential. Learn more at ifmacredentials.org/SFP
- **SFP Instructor Led Courses**-these courses are offered at IFMA Headquarters and other events throughout the year and are also offered by IFMA chapters. Successful completions of these courses allow candidates to apply for the SFP credential. The course calendar can be found at ifma.org/professional-development .

SFP support for IFMA chapters

IFMA is committed to supporting chapter SFP programs. The following resources are available to all chapters.

- SFP brochure in PDF form on the IFMA Web site. Go to ifmacredentials.org/SFP
- Monthly program updates through C3..
- Publicize chapter projects through C3. If you would like to share information on your chapter projects please contact ifma@ifma.org or call the certification department at IFMA.
- SFP power point presentation available upon request. Contact ifma@ifma.org or call the certification department at IFMA to request.

Developing Your IFMA Component Professional Development Plan

Each IFMA Component was chartered to provide information, services and professional development for members. The manner in which educational programs are conducted will help evaluate the component progress toward meeting this overall commitment. Education has a unique meaning to each IFMA member. In order to fulfill the education needs of IFMA Component members, these needs must first be determined in order to develop a plan for presenting educational opportunities. The potential for achieving other Component Unit goals will be enhanced if quality, professional and pertinent programs are conducted.

- I. Identify the IFMA Component educational and membership needs.
 - A. Conduct a more specific needs assessment on educational needs.
 - B. Define the educational goals for the current fiscal year.
- II. Offer a minimum of 6 educational programs per year that are at least 45 minutes long.
 - A. Determine solid educational topics/activities relevant to the chapter's goals and objectives based on your strategic plan.
 - B. Identify budget needs.
 - C. Determine the date & location for each educational activity.
 - D. Select/secure speakers for all scheduled programs.
- III. Determine a means to evaluate all educational programs.
 - A. Evaluate programs individually.
 - B. Evaluate the effectiveness of your Component Unit's overall educational plan.
 - C. Respond to the changing educational needs of members as needed.
 - D. Share evaluation results with Component Unit members.

As an IFMA Component Unit education leader, you are in a position to create one of the most coveted types of opportunities – the opportunity to learn! The education opportunities that you organize, whether it's a workshop, seminar or luncheon, will benefit your members in so many ways.

Needs Assessment and Tips

Ways to Collect Information:

Face-to-Face Interview

- Enables the interviewer to establish rapport with the respondent
- Allows the interviewer to observe as well as listen
- Permits more complex questions to be asked than in other types of data collection

- Some uses: to get before-and-after data about a lesson module; to gather opinions on a specific learning or teaching technique

Telephone Interview

- Takes less time than a personal interview
- Most effective when the number of questions is relatively small and time available to gather data is short

Written Questionnaires and Surveys

- Least costly but slowest method of collecting data
- Requires precise question design

Focus Groups

- Groups of 6 – 10 people with a facilitator
 - Enables the interviewer to establish rapport with the group
 - Allows the interviewer to observe as well as listen
 - Permits more complex questions to be asked than in other types of data collection
 - Quick way to get feedback from multiple persons at once
-

Selecting a Question Format

Important considerations in deciding on the format of questions include how the question is to be delivered (mail, telephone, face to face), the type of information the respondent is expected to provide and the possible alternative responses.

Making these decisions will result in the selection of open -ended, fill-in-the blank, binary-choice, scaled-response or unscaled-response questions. Of course, depending on the type of information desired, a structured interview questionnaire will generally have a combination of these types of questions.

- **Open-ended** --Because open-ended questions provide no structure for the answer, they should be tightly focused to elicit the kind of information the researcher wants to get. And, because they require accurate and time-consuming transcription, their use should be limited to initial research where the number of respondents is small and the object is to refine the research direction and determine more precise questions that can be structured another way.
- **Fill-in-the-blank**--This type of question has a simple answer, usually a name, frequency, or quantity, which is the kind of information these questions are good at obtaining.
- **Binary**--These are good for obtaining factual information that falls into the yes-no, true-false category answer.
- **Scaled-response**--These consist of a list of alternative responses that increase or decrease in intensity in an ordered fashion (example: 1 to 5) rating and ranking.

• **Unscaled-response**--With this type of question, the respondent is asked to choose from one or more options in a list; this type of question should include an "other" or "not applicable" category so that the responder is not forced to select an answer with which he or she is not completely satisfied.

Suggested Types of Educational Programs

While developing an education plan, it is imperative for education leaders to remember that members have different learning styles, are at different career stages and have varied needs. A plan should offer different activities based on the appropriateness of materials to be presented and the level of participant expertise. A variety of program presentations increases interest level and spontaneity.

The following are suggested formats for you to consider:

- **LECTURE:** A one-way formal presentation in which a speaker addresses the audience.
- **PANEL DISCUSSION:** A strategy where an interviewer asks questions of one or more resource persons while participants listen.
- **FORUM:** A facilitated think-tank discussion, with the facilitator, experts, and attendees taking responsibility for the development of the content and the outcomes.
- **CASE STUDY:** A strategy where participants describe and analyze a real-life situation.
- **SMALL GROUP DISCUSSION/ROUNDTABLES:** A strategy where a larger group is divided into smaller groups to enable participants to discuss selected topics.
- **QUESTION & ANSWER SESSION:** A strategy which enables participants to ask questions of resource persons, and which is usually facilitated by a moderator.
- **BROWN BAG LUNCHEs:** A program that is held in conjunction with a lunch.
- **REGIONAL MEETINGS:** Joint educational programs conducted with two or more chapters.
- **RETREAT:** An educational program held in an isolated location without interruption.
- **BREAKFAST CLUBS:** A program that is held in conjunction with a breakfast.
- **TECHNOLOGY LABS:** A hands-on training program utilizing technology.
- **TELECONFERENCE:** A program that links people remotely by telecommunication devices such as televisions or computers.

Resources for Finding Speakers

Referrals: Ask your friends and colleagues from other IFMA Component Units about good speakers they have experienced or heard about.

IFMA Speaker List: Contact your Chapter Liaison to obtain a listing of speakers in a specific topic area or region. IFMA has a list of education speakers; those who teach our courses, i-sessions, webinars, etc. These speakers are usually paid and teach based on IFMA's core competencies. IFMA also has a list of event speakers; those who present at IFMA events (WWP, Management Summit, Industries Forum, etc.). These speakers are unpaid and speak on a variety of FM related topics.

Industry Association Conferences: Check out association websites for speakers presenting at their upcoming conferences and programs.

Some associations you might try are:

- IFMA (www.ifma.org)
- American Society of Association Executives (www.asaenet.org)
- Canadian Society of Association Executives (www.associationplace.com)
- Building Owners and Managers Institute (www.bomi-edu.org)
- American Association of Architects (www.aia.org)
- International Interior Design Association (www.iida.org)
- Association for Facilities Engineering (www.afe.org)
- Local Better Business Bureau
- Local Chamber of Commerce

Speaker Associations: Check out the following websites, many have speaker listings:

- National Speakers Association (www.nsaspeakers.org)
 - Canadian Association of Professional Speakers (www.canadianspeakers.org)
-

Speaker Selection and Preparation

Prior to selecting speaker:

- Conduct needs assessment to gather members' needs
- Select program topics based on results of needs assessment
- Plan budget for annual programs
- Select site for each program
- Seek potential speakers through known resources
- Request Call for Proposals from prospective speakers
- Conduct brief phone interview with prospective speakers; view videotapes and submitted materials if available
- Contact references for brief phone interview
- Discuss topic and needs, explain objectives of the session with prospective speakers

- Explain to prospective speakers the level of customization to the audience

Once speakers are chosen:

- Conduct in-depth phone interview with speaker, acknowledging selection of speaker.
- Provide more detail on audience, including demographics, level of expertise, etc.
- Confirm that both parties agree on all arrangements and compensations, if any.
- Provide detailed logistical information
 - a) Hotel/Air Reservations
 - b) A/V Requirements
 - c) Audio/Video Tape Consent
- Send rejection letters or make calls to those not chosen for speaking
- Gather any information needed from speakers for their sessions (handouts, learner outcomes, etc.)
- Make logistical arrangements with site location
- Submit any materials needed for publication to announce upcoming program(s) in brochures or newsletters
- Arrange speaker travel/hotel arrangements if applicable
- Order/prepare attendee items such as notebooks or other materials to be given on-site
- Prepare name badges for attendees
- Arrange for program evaluations by preparing information or having them printed

Once programs are completed:

- Compile evaluation results
 - Send thank you letters to speakers with evaluation results
 - Track program results throughout the year
-



Chapter Communications, Marketing & Public Relations

Section 7

Communications Chairperson

As the communications chairperson, you will oversee the internal and external communications for the chapter in such areas as seeking public relations opportunities for the chapter, organizing public relations campaigns and publicizing chapter meetings, activities and accomplishments. Activities that may fall under this office include:

- Newsletter;
- Local chapter benefits brochure (annual update);
- Periodic member survey (sq. ft managed, seated population, membership demographics profiles)(annual);
- Meeting announcements;
- Directory of members (annual);
- Periodic purchases of chapter pins;
- Manage Web site for the chapter;
- Manage calling tree for members;
- Manage literature for the chapter, such as stationary, form letters, etc. as needed; and
- Coordinate administrative needs for the chapter, i.e. mailing address, telephone number, etc.

Suggested duties include:

- Identify and cultivate relationships with key media representatives (i.e., local business editors);
- Know the IFMA talking points and provide to all members;
- Publicize and promote meetings, projects and events;
- Publish a monthly chapter newsletter; and
- Work with all officers in compiling the Chapter Awards of Excellence submittal.

IFMA Chapter and Council Web site Guidelines

The internet is a powerful resource for leads and exposure. IFMA appreciates the time and money chapters and councils devote to capitalize on its marketing advantages. However, because it is important that all IFMA-related websites be consistent and uphold the quality image the association portrays, IFMA has established the following guidelines for chapters and councils.

Content

- When promoting events sponsored by IFMA, it is standard text developed by IFMA should be used. Text can be taken from IFMA's collateral material or website. We encourage you to hyperlink directly to each event on IFMA's site at www.ifma.org. This will ensure that you are providing your members with the most accurate and up-to-date information. You may contact IFMA's components team for the exact address. Activities and event information should be updated continually.
- General information about a chapter or council should be updated at least once a month. You will lose your repeat audience if your information is outdated.
- All information about the association, facility management, membership classifications and membership application should be hyperlinked to IFMA's website. This is also to ensure all information about the association is communicated accurately and is updated consistently as it changes.

The following information is not permitted on chapter or council web sites:

- IFMA's membership list, in its entirety or any portion. This prevents the possible attempt to download the list for personal or commercial solicitation. To prevent unauthorized access, the distribution of all membership lists should be controlled carefully.
- IFMA strongly suggests that you do not publish your membership list or e-mail addresses except for the following people: chapter or council executive committee, chapter or council administrators and committee chairs.
- **IFMA would like to reserve the right to use the suffix "net" at the end of any current or future product or service offered on the web. (i.e. "IFMAnet", "JOBnet", etc.)
Duplication among chapter and council web sites causes confusion for the audience.**
- Any information copywritten or considered to be confidential and proprietary to the association. If you have questions regarding the proprietary nature of the information you would like to upload, please contact IFMA prior to publishing it online.

Online Advertising

- You may hotlink a chapter or council site to a sponsor without being subject to unrelated business taxable income (UBTI). A review of this issue by IFMA's certified public accounting firm determined hotlinks would not constitute advertising as long as the links were limited to highlighted sponsor names or icons. This is according to our interpretation in June 1999.
- However, revenue from advertising of products and services on your web site does constitute unrelated business taxable income.

Layout

- Chapters and councils are free to select a design of their choice for their web site. The site must communicate clearly that it is a chapter or council web site as opposed to headquarters' website.
- Suggested fonts to use online are Veranda; Arial-Regular, Black; Helvetica-Light, Regular or Black.
- Need to be in line with IFMA's branding guidelines, available within Component Leader Tools online.

Photos/graphics

- Follow the IFMA guidelines for use of the IFMA logo online. The logo should not be altered in any way and not incorporated in a graphic. Please make sure the logo is legible and the logo can be made bigger as needed. Black and white version of logo is ok to use, but it is preferable to use full color. More information can be found at www.ifma.org/LOGO.
- Photos of Association events and chapter or council activities are permitted, provided that no individuals are pictured holding alcoholic beverages.
- Photos and graphics—including icons and backgrounds—found on IFMA's website and in IFMA's collateral materials may NOT be used without prior approval from IFMA. Be cognizant of any copyright or purchase agreements IFMA has in place and abide by contractual limitations for use. It is okay to use headquarters elements without altering when used to promote the item or event.
- Please use the new Chapter and Council logos to be found at www.ifma.org/LOGO. Please do not alter your chapter or Council logos in any way, but they can be made bigger or smaller as needed. More information can be found at www.ifma.org/LOGO. Questions please contact IFMA Marketing at marketing@ifma.org.

Links

- All chapter and council websites should include a link to IFMA's Web site at <http://www.ifma.org> on the front page. IFMA will provide the graphic upon request.
- IFMA encourages you to link to other chapter or council sites available online.
- When your site is ready to go live, please contact the components team and provide your URL so that you are hyperlinked from <http://www.ifma.org>.
- Please contact IFMA immediately if you change the URL for your chapter or council website.
- Links to related associations or commercial enterprises should be reviewed by IFMA prior to placing them on your website. IFMA will evaluate each request on a case-by-case basis. This is to ensure the integrity of the association is not compromised.

General Information

- Chapters or councils can include any information they deem appropriate (about their specific chapters or councils with the exception of the aforementioned items). The content should always be carefully reviewed for typographical and grammatical errors and accuracy. Please ensure that the author of any material is noted and the site where the information was posted is listed as well.
- IFMA reserves the right to remove any chapter or council hyperlink from its website that does not conform to the guidelines listed above.
- Do not post sensitive material – jokes, cartoons or links to websites that may be offensive or controversial.

GUIDELINES FOR PRODUCING AN EVENT ANNOUNCEMENT

1. Keep it simple.
2. Include all pertinent information on the event. For example, do not just include the time when the event begins, but rather when it begins and ends, the physical address where the event is to be held, etc.
3. Why should someone attend? What will they learn or take away from this event? Include this/answer this question for each event.
4. Do not “pad” the copy in the brochure. The length of the copy is not what is important; it’s what the copy says that is important. Do not use unnecessary words or repeat information to take up space.
5. Make sure all information is correct. Verify phone numbers and addresses for the event location. Confirm speakers before the brochure is sent to the printer.
6. It is important that the style of your brochure be consistent.
7. Make it clearly understood that the chapter or council event is sponsored by “The XYZ Chapter (or Council) of IFMA” If this is not stated, potential attendees may think the event is sponsored by IFMA..
8. The following are some sections you may want to consider for an educational event brochure: event overview; outline of event; description of speaker(s); who should attend; description of chapter or council and IFMA; and registration information.
9. Always include a phone number, e-mail address or website for people to register for and obtain further information about the event.
10. Do not feel as if you have to produce a four-color brochure. Black-and-white or two-color brochures (typically black and a second color) are usually adequate.

ACTIVE STEPS IN CREATING A SUCCESSFUL MARKETING CAMPAIGN

(Credit to Jay Conrad Levinson)

1. Find the inherent drama within your offering.

After all, you plan to make money by selling a product or a service or both. The reasons people will want to buy from you should give you a clue as to the inherent drama in your product or service. Something about your offering must be inherently interesting or you wouldn't be putting it up for sale. In Mother Nature breakfast cereal, it is the high concentration of vitamins and minerals.

2. Translate that inherent drama into a meaningful benefit.

Always remember that people buy benefits, not features. People do not buy shampoo; people buy great-looking or clean or manageable hair. People do not buy cars; people buy speed,

status, style, economy, performance, and power. Mothers of young kids do not buy cereal; they buy nutrition, though many buy anything at all they can get their kids to eat - anything. So find the major benefit of your offering and write it down. It should come directly from the inherently dramatic feature. And even though you have four or five benefits, stick with one or two—three at most.

3. State your benefits as believably as possible.

There is a world of difference between honesty and believability. You can be 100 percent honest (as you should be) and people still may not believe you. You must go beyond honesty, beyond the barrier that advertising has erected by its tendency toward exaggeration, and state your benefit in such a way that it will be accepted beyond doubt. The company producing Mother Nature breakfast cereal might say, "A bowl of Mother Nature breakfast cereal provides your child with almost as many vitamins as a multi-vitamin pill." This statement begins with the inherent drama, turns it into a benefit, and is worded believably. The word almost lends believability.

4. Get people's attention.

People do not pay attention to advertising. They pay attention only to things that interest them. And sometimes they find those things in advertising. So you've just got to interest them. And while you're at it, be sure you interest them in your product or service, not just your advertising. I'm sure you're familiar with advertising that you remember for a product you do not remember. Many advertisers are guilty of creating advertising that's more interesting than whatever it is they are advertising. But you can prevent yourself from falling into that trap by memorizing this line: Forget the ad, is the product or service interesting? The Mother Nature Company might put their point across by showing a picture of two hands breaking open a multivitamin capsule from which pour flakes that fall into an appetizing-looking bowl of cereal.

5. Motivate your audience to do something.

Tell them to visit the store, as the Mother Nature Company might do. Tell them to make a phone call, fill in a coupon, write for more information, ask for your product by name, take a test drive, or come in for a free demonstration. Don't stop short. To make guerrilla marketing work, you must tell people exactly what you want them to do.

6. Be sure you are communicating clearly.

You may know what you're talking about, but do your readers or listeners? Recognize that people aren't really thinking about your business and that they'll only give about half their attention to your ad— even when they are paying attention. Knock yourself out to make sure you are putting your message across. The Mother Nature company might show its ad to ten people and ask them what the main point is. If one person misunderstands, that means 10 percent of the audience will misunderstand. And if the ad goes out to 500,000 people, 50,000 will miss the main point. That's unacceptable. One hundred percent of the audience should get the main point. The company might accomplish this by stating in a headline or subhead, "Giving your kids Mother Nature breakfast cereal is like giving your kids vitamins—only tastier." Zero ambiguity is your goal.

7. Measure your finished advertisement, commercial, letter, or brochure against your creative strategy.

The strategy is your blueprint. If your ad fails to fulfill the strategy, it's a lousy ad, no matter how much you love it. Scrap it and start again. All along, you should be using your creative strategy to guide you, to give you hints as to the content of your ad. If you don't, you

may end up being creative in a vacuum. And that's not being creative at all. If your ad is in line with your strategy, you may then judge its other elements.

IFMA PUBLIC RELATIONS GUIDELINES & TOOLKIT

Communicating FM with the Media

Creating a strong public relations plan should be a key component of any IFMA Chapter communications strategy. While interacting with the media can be challenging, the rewards it can offer make the effort well worth the risk. While the practices and principles outlined here will help to de-mystify the chapter-media relationship, there is simply no substitute for actual experience. Public relations is built on relationships, and relationships require human interaction. This guide should be viewed, therefore, as a compass, not a map. It is designed to point you in the right direction.

What is public relations?

Public relations is a management function that identifies, establishes and maintains mutually-beneficial, information-sharing relationships between an organization and the people on whom its success or failure depends. More often than not, this relationship is brokered by the media, including but not limited to print and broadcast media, online outlets such as blogs, and social media. In lay terms, it is an ongoing discussion between an organization and people who want to learn more about that organization

What is the difference between public relations and marketing?

Marketing is specifically concerned with an organization's relationship with its customers. It identifies ways to satisfy customer needs and wants. Public relations, on the other hand, deals with a broader range of people involved with or affected by an organization.

Seeking publicity & developing relationships

Publicity is a part of the central foundation of public relations. Publicity is when information from an outside source is used by the news media based on its news value. It is an uncontrolled (unpaid) method of placing messages in mass media.

Some examples of things that might warrant publicity include a large increase in membership, the results of a fundraising campaign, an event announcement, survey results or any media item that describes your organization and its contributions to the communities it serves.

What is the difference between publicity and advertising?

Whereas publicity is free and uncontrolled, advertising content, placement and timing are controlled by the sponsor who pays for the time or space in the media. Publicity and advertising are used in public relations programs as alternative methods of placing messages in the media.

The best way to achieve earned publicity is to develop working relationships with members of the media. This is all the more important because competing information is so readily accessible through electronic mediums like email and social media. A human relationship can make information stand out from the background noise. Here are tips for establishing and maintaining strong relationships with members of the media:

- Call reporters in your region and offer yourself as a source for future stories. Keep a list of subject matters you can speak about with expertise. Such a list may include things like office layouts, project management, sustainability and systems management.
- When/if a reporter contacts you with questions, try to get them the answers they need as soon as possible. If you don't have the answers, or if you'd rather not speak on a particular subject, let them know quickly.
- Always be considerate of the fact that reporters don't have a lot of free time. This is especially true around deadline time (around 3-5 PM when they are putting the final touches on the next day's stories) and late in the work week when they are busy writing the next days' stories as well as any coverage for the weekend.

Know your audience

When you are working with the media, the first thing you want to do is identify the audience. In most cases, there are two distinct communication episodes happening at once. The interview itself is a simple two-way interaction between the interviewer and the interviewee. It would be a mistake, however, to consider the journalists to be the audience. That's because the second layer of communication – by most accounts, the essential part – occurs after the interview when the story that results from the interview is published. It's that second audience that public relations should direct their attention to during media interviews.

Who is your audience?

Your audience is the group of people in the general public who would be interested in your news item, and even those people who you would like to take greater interest in your organization. The primary audiences for local IFMA chapters may be (but are not limited to):

- Current members,
- Prospective members,
- Local media and
- Other local organizations.

Once the direct and indirect audience has been considered, the next step is to decide what impacts will matter to them and how best to organize those impacts to achieve the desired goal. Organize those ideas into a manageable number of main points (between 2-5). It's a good idea to physically write them down on note cards and physically have them with you during the interview. Place them in a place you can see them as a reminder to refer back to them frequently.

Remember: impacts are why things matter to the audience.

Use impacts to reach any audience

For facility management professionals, a common communication challenge is the complexity of the message. In addition to explaining complex systems and processes to colleagues, facility managers are often required to communicate hypothetical benefits and harms of certain actions or inactions. One effective strategy for overcoming these challenges is to focus on impacts. To demonstrate this, consider how matters of facility management are considered in a traditional home environment.

While it's true that the general public may not be familiar with facility management as a discipline or profession, they do understand the concepts of facility management from their own lives. Consider, for example, a water heater. While the execution certainly differs between a hot water heater in a 2,000 square foot home and a 100,000 square foot high rise office building, the basic principle is the same. The hot water heater provides hot water. Hot water is beneficial.

At home, the technical explanation for a hot water heater may be less important than understanding the benefits that hot water heater can provide. It's not the how that people care about. It's not the how that motivates people to install a hot water heater. It's the tangible benefit that counts: hot showers, clean dishes and clothes. These benefits apply regardless of how complex the systems are to achieve them. Whether you're in a 2,000 square foot home or a 100,000 square foot high rise, hot water is hot water.

You can apply this approach to just about anything. A washer and dryer cleans clothes, but it also saves time by freeing the user from the laundry mat. For any system, there is the literal function and there is the subjective benefit that function provides. People are inherently motivated by the subjective benefit, a fact that applies across all facilities.

Facility managers can apply this psychological reality to their communication. In practice, this means changing the content of the message. Rather than focusing on the technical reality of what is needed, facility managers should consider placing more emphasis on the end-user benefit – the impact – they hope to achieve.

Impacts can be present or future and they can be positive or negative. This yields four types of impacts: present positive, present negative, future positive and future negative. The future impacts can also be understood as opportunity benefits and opportunity costs.

For many facility managers, most of the impacts will be opportunity cost/benefits. These future impacts are much more challenging to convey than present impacts which are tangible, measurable and certain. It is, therefore, worth considering helpful strategies for conveying intangible impacts effectively.

The Media Interview

One of the best ways to establish relationships with journalists while earning publicity is through conducting media interviews to provide relevant information for news items. Interviews can be used for broadcast (television, radio, web video) live or recorded, or they can be for print (newspapers, magazines, blogs) publications. There are no set standards for a media interview, but these guidelines may help get you off on the right foot.

Before the interview

Research the reporter/publication. The last thing a facility manager wants is to find themselves ambushed by a reporter that has an axe to grind with a company, industry or idea. Take a few minutes to research the reporter and their publication to see if there are any red flags, and to get a sense of the reporter's style.

Ask for the questions ahead of time. Not all reporters will provide them, but many will. If the questions are provided, they should be considered as a guide for the direction the reporter is hoping the interview will go. Unless previously agreed upon, the reporter is not limited to ask only these questions and may ask anything during the actual interview.

Decide how to respond. Many reporters will accept responses in many forms. An in-person or phone interview gives the benefit of long-form exposition, which makes it more likely that the interview will shape the direction of the story. On the other hand, long interviews sacrifice control over exactly what the reporter chooses to quote. The primary benefit of an email or written response is more control over exactly which quotes appear in the published story in exchange for less control over the direction the story goes. There is also do a hybrid of the two – a verbal interview for information with the responses for quotation provided in writing. There may also be some cases where no response is warranted or where ignoring the request is the best course of action.

During the interview

As soon as the interview begins, it's always a good idea to ask the reporter what they already have. This offers the interviewee a chance to get a sense of what direction the story is going, while also serving to break the ice.

Once the interview begins, remember the main points and refer to them frequently. Find ways to tie questions back to the main points. This is why it's a good idea to have those points written down on index cards and displayed in plain view.

Choose words carefully. Pause before speaking to think –10 words are better than 100 and it's (usually) okay to admit not knowing something. Avoid Jargon! While jargon has uses in technical fields, it's never a good idea in a media interview because it's impossible to guarantee that the entire audience will understand the jargon being using.

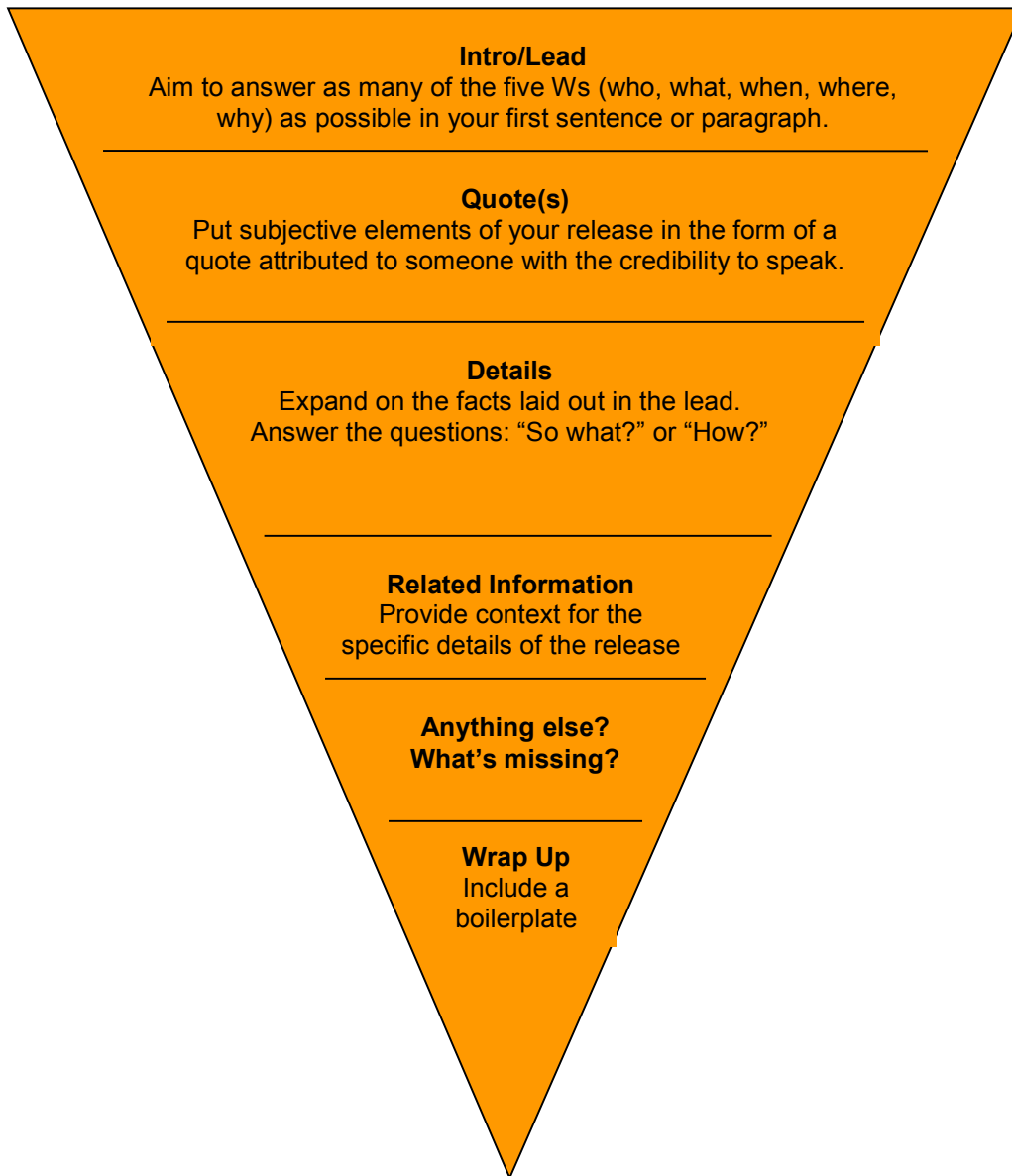
After the interview

Say thank you. A "Thank you" e-mail is always a good idea, not only because it's a great way to establish good will with the reporter now has near total power over the direction of the story, but because it's a last chance to ensure names and titles are spelled correctly.

Just a few years ago, asking to see an advance copy of a story before publication would have been inappropriate. Lately, however, more reporters have been willing to share their stories before publication. This is especially true when a story covers a highly technical subject where specific words are important and could change the nature of the story. At the very least, you can ask when to expect publication and if you can get a copy.

PRESS RELEASE WRITING: THE INVERTED PYRAMID

This inverted pyramid provides a visual illustration of what information should be included within a press release and the best way to arrange and present that information.



GUIDELINES FOR FORMATTING PRESS RELEASES

There is no single correct way to format a press release. Be that as it may, here are some general guidelines to get you started:

1. Use a standard, easy-to-read typeface, such as Arial or Times New Roman, preferably in 10 or 12 point font.
2. Type on one side only of letter-size (8 1/2" x 11") paper or IFMA letterhead (first page only, IFMA headquarters can provide letterhead if necessary).
3. Single space paragraphs with double spacing between paragraphs.
4. Leave ample margins on all sides.
5. Include a date, contact name, organization name and phone number on top of the first page.
6. Start the release with a dateline, which contains the city and state from which it originates. (Example: AUSTIN, Texas — The Austin Chapter of...) Note that the city is listed in all caps and the state is not. (Refer to the "AP Stylebook" for exceptions to this rule.)
7. Include "###" or "-30-" at the bottom of the last page to indicate the end of the release.
8. Please note: All IFMA press releases should contain the following paragraph, or "Boilerplate" updated to reflect your chapter or council's profile:

The _____ [Chapter/Council] of IFMA is the local entity of the world's largest and most widely recognized international association for professional facility managers, supporting more than _____ members in _____ countries. The _____ [Chapter/Council] of IFMA provides educational and networking programs for facility managers in the _____ area. For more information, please visit _____ (insert Web site here).

This paragraph should appear at the end of the release, before "###" or "-30-".

MEDIA KIT/RESOURCES

The resources listed below will assist you as you write press releases and media advisories, respond to media inquiries and answer questions from prospective members. Your public relations plan should be transferred each time there is an officer change. Include the following:

* The most recent edition of "The Associated Press Stylebook."

1. Current IFMA, chapter or council and international statistics.
2. Articles from trade publications or elsewhere that give an overall perspective of the facility management profession.
3. Digital images of chapter or council activities. (High resolution preferred, such as 300 dpi.)
4. A log of radio, television and speaking engagements carried out by members of your chapter or council.
5. List of possible PR relationships with other organizations.
6. A supply of brochures, reprinted articles and other materials concerning your chapter or council, IFMA and the facility management profession.
7. Clippings of all articles, news releases and calendar events featured in local publications.
8. Google alert coverage. Visit www.google.com/alerts to set up custom chapter or council alerts.
9. A calendar of chapter or council events, to be submitted to area media outlets for calendar/event notices.
10. A listing of press releases, media advisories and other news on your chapter or council Web site.
11. A media list containing the following:
 - a) Daily and weekly local newspaper contacts, containing the names of papers that would potentially be interested in printing IFMA news. This list should include the names, phone numbers and e-mail addresses of writers at each paper in charge of a calendar/event section (for meeting announcements) and a business section (for officer elections, awards and newsworthy chapter functions). IFMA headquarters will be pleased to provide you with this information.
 - b) Television and radio contacts, containing the names, phone numbers and e-mail addresses of contacts at stations which may announce the time and location of IFMA meetings (many run listings late at night, on weekends or on their Web sites) or which have community affairs programs that may run listings or even devote a segment to facility management or your chapter or council.

DOs AND DON'Ts OF MEDIA RELATIONS

Do:

1. Admit when you don't know the answer and arrange to get the information or refer the reporter to someone who can help.
2. Be "low-key" rather than "hard-sell" in your relations with the media.
3. Seek only tasteful, positive publicity.
4. Always be aware of what you're saying to a reporter, especially as a representative of IFMA.
5. Prepare and keep current lists of all media people with whom you deal (IFMA headquarters can assist you with compiling these lists).
6. Direct all materials to the proper person.
7. Know media deadlines and provide material accordingly.

Don't:

1. Lie to the media. You do not have to discuss every subject, but when asked difficult questions, never resort to lying to save face.
2. Say anything to a media person anywhere, at any time, on any subject that is "off the record." Everything you say is fair game.
3. Pressure the media by inventing reasons to call or calling too frequently. This will negatively impact your chances of getting positive news coverage.
4. Insist on name identification in a story regardless of context. Unless otherwise noted, the story should be about IFMA or your chapter or council, not any one individual.
5. Schedule press conferences, except in unusual circumstances, and then only after conferring with the communications department at IFMA headquarters.

GUIDELINES FOR WRITING A PRESS RELEASE

Editors and writers may receive hundreds of press releases each week. In order for your release to be taken seriously and stand out from the others, it must be written as professionally as possible. Here are some tips:

1. Keep it simple.
2. Avoid jargon or industry-specific buzzwords which may be unfamiliar to lay people. Never assume a reader will understand an uncommon term. Always spell out “International Facility Management Association” on first usage. IFMA may be used on any other usages in the same release.
3. Be brief.
4. Get to the point. Never make a reader search for the meaning of your release.
5. Cut out unnecessary, needless, superfluous words. Really, cut them out.
6. Be objective; stick to the facts. Include subjective elements only in attributed quotes.
7. Always attribute quotations to a person, not an organization or title.

After you complete a press release, ask yourself the following questions:
(Refer back to the inverted pyramid on page three.)

1. Are my objectives clear in this release?
2. Is the lead direct?
3. Have the essential questions — *who, what, where, when, why* and *how* — been answered in the first few paragraphs?
4. Are sentences short and concise? Is the wording clear and concrete?
5. Has AP style been followed throughout the release?
6. Are spelling and punctuation correct?
7. Have all facts been double-checked for accuracy?
8. Does the release appear neat and professional?
9. Does the release include a dateline and today’s date? Is a point of contact listed? Make sure to include names, telephone numbers and e-mails.

FOR IMMEDIATE RELEASE

Contact: Jed Link
+1 714-925-5465
jed.link@ifma.org

IFMA, CBRE release white paper: “Facility Management Trend Report: Emerging Opportunities for Industry Leaders”

HOUSTON, TX — (Feb. 4, 2014) — The International Facility Management Association (IFMA) in conjunction with CBRE Group, Inc. has produced a white paper identifying key trends and opportunities within the facility management (FM) industry. The full report, titled Facility Management Trend Report: Emerging Opportunities for Industry Leaders, gives a data-supplemented account of a two-day workshop held at IFMA’s 2013 World Workplace Conference and Expo, Oct. 2-4, 2013 in Philadelphia, Pa., USA. The workshop included more than 20 facility management practitioners, real estate leaders, service partners, academics, consultants and members of IFMA who explored facility management trends in leadership, sustainability and technology.

“As facility management professionals come together to create and define their discipline, a clear, unified picture of the industry is emerging,” said IFMA president and CEO **Tony Keane**. “Recently, FM has grown in prominence as the opportunity to identify shared solutions to shared problems has elevated the profession. Organizations like IFMA and CBRE support the network that is crafting the developing standardization. This timely white paper provides invaluable insight into FM opportunities that will shape the industry for decades to come.”

FM professionals utilize multiple disciplines to ensure functionality of the built environment by integrating people, place and process. Around the world, the industry continues to advance to new levels of importance as the built environment grows more sophisticated.

The white paper offers insight into trends and opportunities across three subject matters:

- Leading the Conversation – Showcasing FM relevancy and impact in areas such as business continuity, corporate social responsibility initiatives and employee wellbeing.
- Speaking the Right Language – Relaying FM opportunities and challenges in ways that resonate with the C-suite.
- Building the Future of FM – Identifying talent, building integrated systems that connect data from disparate resources and cultivating agility to meet continuously changing business and culture.

The full report can be purchased at the [IFMA Store](#) (online at <http://www.ifma.org/marketplace/store>; US\$120 for IFMA members/US\$180 for non-members).

IFMA is the world's largest and most widely recognized international association for facility management professionals, supporting more than 23,500 members in 94 countries. The association's members, represented in 130 chapters and 17 councils worldwide, manage more than 37 billion square feet of property and annually purchase more than US\$100 billion in products and services. Formed in 1980, IFMA certifies professionals in facility management, conducts research, provides educational programs and produces World Workplace, the world's largest facility management conference and exposition. To join and follow IFMA's social media outlets online, visit the association's [LinkedIn](#), [Facebook](#), [YouTube](#) and [Twitter](#) pages. For more information, visit www.ifma.org.

NEWSLETTERS: COMMON QUESTIONS

Why should our chapter have a newsletter?

A well-written newsletter could be your chapter's or council's most effective public relations tool. Every member on your mailing list will receive your chapter or council newsletter. If you, for example, have a problem with inactive members, a newsletter will keep them informed of upcoming meetings, special events and educational opportunities that may be of interest to them.

A newsletter is also an excellent way to communicate with new and potential members. An effective newsletter will not only tell new members about your chapter and its events, but will also motivate them to attend. The newsletter can also potentially assist in attracting new members. Encourage current members to share it with co-workers who might be interested in IFMA. Reading about your chapter or council's educational activities may be the push they need to join.

How long should a newsletter be?

There is no set length for a newsletter. The rule of thumb is to make it as long as it needs to be. For instance, if you are a small chapter or council, you probably don't need an eight-page newsletter. When you are deciding on the size, write down everything that you want to cover in your newsletter and how long each item will be. If you only have enough information for a one-page newsletter, then just produce one page. People are less likely to read a long newsletter filled with unimportant information; they will read it if they know the material is helpful and important. The current trend among IFMA chapters is to distribute e-newsletters in PDF format or to post news online on their Web sites. These methods save on printing costs and offer the flexibility of an electronic medium.

Do we have to produce a newsletter every month?

No. There are many successful newsletters — produced by IFMA chapters, councils and other organizations — that are not produced on a monthly basis.

If you feel your chapter or council only has enough pertinent material to produce a newsletter four or six times a year, set that as your goal. If you are worried your members will not be aware of your monthly meeting, send meeting reminder e-mails or letters. However, if you really feel that you need to have a monthly newsletter, review the length. For example, if you decided you need a four-page newsletter but discover you only have enough material to produce it six times a year and you really want to produce it monthly, change your newsletter to a two-page format. After you decide on a publication schedule, make sure that it goes out on time.

How important is accuracy and clarity in your newsletter?

The importance of accuracy in a newsletter cannot be overemphasized. If you are not sure of a fact, date or phone number, do not print it. Always check your facts. For instance, call the phone number you are going to list or try to obtain a copy of a brochure you are recommending.

It is also very important to write clearly. Do not assume every person reading your newsletter will be familiar with the same acronyms, issues or laws. If you have any doubts, spell out acronyms on first reference or give a brief description of a new law.

GUIDELINES FOR NEWSLETTER COPY

- 1. Table of Contents:** It is essential for readers to be able to locate certain articles and/or specific sections easily. Ease of reading and familiarity with a consistent recurring layout establishes a dedicated readership.
- 2. Event Information/Calendar:** This should include information on your monthly meetings and special events (which would include facility tours or parties). Additionally, you can report any upcoming regional or international seminars or conferences at which your chapter or council will appear. These conferences and seminars do not always have to be IFMA-related. If you think it is important that your members know of an event, include it.
- 3. Membership Information:** It is always good to keep your members informed on the size of your chapter or council and who the latest board members are. New appointments to the board of directors should always be included. If you have the room, list your new members each time you publish your newsletter. Space permitting, also list their employer and contact information. Not only will it make them feel more welcome, but it will also let your members know if one of their associates has joined IFMA.

Member profiles also are a good feature for a newsletter. These stories could be detailed biographies or very brief (three- or four-line) descriptions of a new member.
- 4. Feature Stories/Case Studies:** Feature stories are a good educational addition to your newsletter. Examples include a case study on an organization's successful relocation, newly published facility management research or "how-to" articles. This is an excellent section to ask your members to write.
- 5. President's Column:** Use this column as a way to deliver messages about important local and national events or to pass on information that members may not have been aware of. For example, if your president attended World Workplace, he or she could write a report on the conference.
- 6. Job Bank:** If your chapter or council offers a job referral service, the newsletter is an effective place to run those positions. Placing them in the newsletter also will save your chapter money by eliminating the need for separate job bulletins. Do not include jobs from JOBnet.
- 7. Photography:** When possible, add high-resolution photos (300 dpi) to enhance content.
- 8. Miscellaneous:** Reviews of previous educational meetings provide good copy for your newsletter. Not every member can attend every meeting. By reporting on it, you are allowing each member to benefit.

Fundraisers should also be covered in the newsletter. Make sure you give members enough notice of the date of the event and always give a recap on how successful it was.

If your chapter or council becomes involved with a charitable organization, include that in your newsletter. Whether you need members to donate office furnishings or their time, this is another cost-effective way of letting them know what you are doing.

Basic layout advice

Columns:

Your newsletter grid should use no fewer than two columns per page, and no more than four.

Allow your grid to accommodate columns of different widths, e.g., use two- and three-column layouts in the same newsletter, so that the information is clear and easy to read.

Body Text:

In a newsletter, body text should be at least 10 points and no larger than 12 points (this is 10-point text.) Use the Arial or Times New Roman font for body text since it is easier to read. (A font is a typeface.)

The following is an Arial font: Arial

The following is a Times New Roman font: Times New Roman

See the difference? There are many fonts to choose from, but for basic body copy, these are the best two.

Headlines:

Headlines should be larger than the body text. Vary the size of headlines in your newsletter to help break up any monotony. There are no set rules. Use what you think looks good.

A kicker is a headline that sits right below the main headline and is usually half its size and italicized. Kickers add a little bit more information than your main headline and help to pull the reader into the story.

Try to use a verb in each major headline. Most newspapers use the verb tense referred to as the “historical present.” For example, you wouldn’t say, “President Bush cut taxes;” you would use the historical present tense to say, “President Bush cuts taxes.

Subheads:

Subheads are smaller headlines placed throughout an article to introduce a break in editorial flow.

They should contrast with body text in type size and style. When there is insufficient contrast, subheads tend to blend into the body text and give readers a sneak preview of the content.

Photographs:

Don't run photographs just because you have them. Make sure they have a purpose and are of good quality. If the photos are bad, run a graphic or a bigger headline to take up space. If a photo has too much dead space (space with nothing in it), crop it out. Only include the pertinent portion of the picture.

Photos need captions. A caption is the text explaining the photo. Captions are necessary because you don't want to make the reader wade through the article to find out what the photo is. If the photo and its caption are effective, more people will read the article. For mug shots (head shots), the name of the person usually will suffice as a caption.

If you have a group of photos on one page, you may want to group the captions. Direct the reader to the right photo by using directives such as, "Clockwise from top left," or just "upper left," "center," "bottom right," etc. Captions should be in a different font style from the body text.

Pull-quotes

A pull-quote is a short phrase or sentence extracted from an article and made visually prominent. Pull-quotes can make page design more interesting and spark reader interest. Set off pull-quotes with lines, a box or ample white space. Use a larger font size than your body text, perhaps an italicized version of the body text typeface.

Visuals:

The right visuals can add to your newsletter. If you use a graph, chart or clip art, make sure it looks good. If it's sloppily done, leave it out. Don't feel you have to use artwork with a story. If you think what you have is of poor quality, it probably is. Use something else or nothing at all.

Headers, footers:

Usually, the newsletter title is repeated at the top of every inside page, along with the date. This is called a header and it helps reinforce the newsletter's identity. If the same

information is printed at the bottom of each page, it's called a footer. Use whichever one works best with your layout.

Page numbers should always be placed toward the outside of a page, i.e., on the left-hand side of even numbered pages and on the right-hand side of odd numbered pages, no matter if you use a header or a footer.

Color:

Color looks great on a newsletter if it's used sparingly. Use color on boxes, artwork, lines or your nameplate. Don't use color on body text or headlines. People prefer reading black text.

Size of newsletter:

Don't limit your thinking to 8 1/2" by 11" paper. Your newsletter can be whatever size you want: legal (8 1/2" by 14"), tabloid (11" by 17") or even smaller than your standard sheet. If you usually have a lot of text, consider switching to a larger format. If you have trouble filling your pages, consider a smaller format.

Paper:

You need to choose between coated (glossy stock) and uncoated stock on which to print your newsletter. Coated stock is non-recyclable, therefore many companies are switching to uncoated. Colored paper is, most times, not recyclable, so think twice before you send out that Christmas party flier on red paper.

Jumplines:

When an entire article doesn't fit on the page you started it on, you have to either cut the article to fit or jump the rest of the article to another page.

When you choose to jump, you must direct the reader to the other page with a jumpline, such as "continued on page 2," or "see IFMA on page 3." Use bold text or a different font style for the jumpline to distinguish it from the body text. On the second page of the article — the jump page — the reader must be able to find the article quickly. Run a short headline (the same one you used on the first jumpline, if you used one) and put, "continued from page 1," etc.

Be aware that when you jump an article, you lose readership. So if you're considering jumping an important article, try not to.

Table of Contents:

Another way to increase your readership is to include a table of contents on the front page. Place the contents box in the same approximate spot each issue. Include only the highlights of the newsletter. Don't feel you have to include everything.



IFMATM

International Facility Management Association

Empowering Facility Professionals Worldwide

IFMA

Section 8

IFMA Frequently Used Terms

Below is a glossary of terms created or used by IFMA.

Accredited Degree Program - IFMA has developed standards to recognize quality facility management first-professional degree programs at colleges and universities. The recognized program initiative was designed to recognize and encourage the strengthening of current, valid facility management education degrees and to assist in the development of new facility management degree programs.

Awards of Excellence – This is IFMA’s awards program and the title should not be used for individual chapter or council awards.

Awards Categories:

The George Graves Award for Facility Management Achievement

The Sheila Sheridan Award for Sustainable Facility Operations and Management

Distinguished Member Award

Associate Member Award

Distinguished Member Award

Educator Award

Emerging Leader Award

Distinguished Author Award Article or Research Paper

Distinguished Author Award Book or Instructional Materials

Distinguished Author Award Web Based/Social Media

Chapter Award Government Affairs

Chapter Award Professional Development

Chapter Award for Web Communication

Chapter of the Year Award

Student Chapter of the Year Award

Council Award of Excellence in Communications

Council Award Programs and Professional Development

Council of the Year Award

Best Practices – Umbrella term used to describe the process of identifying the most effective practices, methods, and know-how throughout an organization(s) or a particular subject matter.

CEU – Continuing Education Unit – The continuing education unit is a standard of measure for continuing education or training. The criterion was developed by the International Association for Continuing Education and Training (IACET). IACET defines the CEU "as 10 contact hours of participation in an organized continuing education experience under responsible sponsorship, capable direction, and qualified instruction." In other words, one CEU equals 10 hours of instruction included in a specified continuing education program or activity.

CFM – Certified Facility Manager – IFMA developed certification to meet the recognized need of the facility management profession for a designation that would not only help FMs gain additional credibility but also establishes increased global recognition for the profession. It is the only reliable global standard for recognizing the competencies of facility managers.

Components – An umbrella term for IFMA’s chapters, councils, communities of practice, institutes and alliances.

Components Team – The IFMA team that supports all of IFMA’s component leaders. The team can be contacted via email at components@ifma.org and via phone at 713-623-4362 option 6.

Chapters – Chapters offer members a wealth of educational and networking opportunities. Chapters allow members to interact with professionals locally. IFMA has 125 chapters.

Communities of Practice – Communities of practice are organized special interest groups that unite members of specific industries not represented by IFMA councils.

Corporate Sustaining Partner – The Corporate Sustaining Partner (CSP) Program is designed for companies providing product and service solutions to facility management professionals. IFMA's Corporate Sustaining Partners elevate their image and name recognition within the largest facility management audience, IFMA membership, while also receiving exclusive marketing and promotional benefits.

Councils – Industry or interest-specific groups within IFMA. Councils provide opportunities for interaction that transcend chapter and regional boundaries, enabling members to meet other professionals who share an interest in a specific FM practice or who work in the same business sector. IFMA has 16 councils.

Dues Remittance – Chapter and council portion of dues sent from IFMA headquarters. Deposited monthly in the chapter's or council's account for those members who choose to be members of a chapter or council.

European Facility Management Conference – EuroFM and IFMA are honored to present the most significant, all-encompassing educational and networking event for facility professionals in Europe. Join FMs of the East and West, North and South and all the cultures in the world for Europe's premier facility management conference.

Facility Fusion – At Facility Fusion, the brightest minds in the industry come together to connect, communicate and help redefine modern-day facility management.

This fresh, dynamic educational event is a powerful opportunity for you to network with like-minded professionals and develop innovative solutions for the increasingly multifaceted layers of FM.

Facility Management Journal – (FMJ) – Published by IFMA, the *Facility Management Journal* is written specifically for professionals who are concerned with developing and maintaining productive workplaces. The bimonthly publication is a benefit of IFMA membership and is subscribed to by many public and private libraries.

European Facility Management Conference – The European Facility Management Conference provides an important international forum bringing together the leading professional bodies, engaging FM professionals in all areas of activity and bridging continents, countries and cultures. The conference format includes two intensive days of professional learning, an exchange of ideas and workshops followed by EuroFM's well-established Research Symposium on the third day, which provides a showcase for the leading FM research projects underway. Social events include tours, receptions and a gala dinner.

FM – An abbreviation for facility management or facility manager.

FM Guide Online – This online directory of FM product and service providers is a separate resource from the printed FM Guide. Companies must purchase separate listings in each resource. The FM Guide Online (www.onlinefmguide.com) is supported by MultiView, an expert in online directories.

FMP – Facility Management Professional – An entry-level, knowledge-based credential, the FMP is geared toward FMs with less than five years of experience and designed to accelerate an FM's transition into the profession.

IFMA – International Facility Management Association – This is the correct name of the Association. Please verify that this is the name you are using. Do not use different forms of the name such as International Facilities Management Association or International Facility Managers Association. IFMA has an Internal Revenue Service status as a Not-For Profit 501C(6) incorporated in the State of Michigan and doing business in the State of Texas.

IFMA Fellow – The most prestigious title bestowed by the Association is that of IFMA Fellow. Fellowship recognizes outstanding contributions to the Association. Fellowship creates an elite core of respected

leaders who can be called upon to act as advisors to and ambassadors for the Association. Fellows are selected by nomination only.

IFMA Foundation – The IFMA Foundation was created in 1990 as a non-profit, 501c(3) corporation. Its mission is to identify, fund and promote education and research for the advancement of the facility management profession. It is the only institution specifically created to achieve these goals.

IFMA Insider – This e-mail briefing of news and trends affecting facility managers is distributed biweekly to IFMA members.

IFMA's World Workplace Conference & Expo – Note this is the exact name and those who do articles or write features should be careful to follow this style. The single most informative FM event in the industry, IFMA's World Workplace features educational programs, extensive networking opportunities and an all-encompassing exposition of products and services relevant to facility management. You will not find another industry event with the quality and scale of this educational program, making IFMA's World Workplace simply the best environment to evaluate, learn, network, discover, explore and experience workplace dynamics. The name is owned by IFMA and cannot be used for any other event.

JOBnet – IFMA's online job referral helps match qualified job hunters with great FM employment opportunities. Located at www.ifma.org/jobnet, JOBnet allows users to post resumes, search for jobs, post jobs and search for resumes.

Mail Delivery Option – This membership option allows members to receive the *FMJ* and other benefits by postal mail instead of only via IFMA's Web site. This is an additional fee-based option to the base membership.

Maintenance Points – Certification for the CFM is valid for three years. During this time CFMs are required to earn 120 maintenance points in at least two of the following four categories: Practice, Continuing Education, Professional Involvement and Development of the Profession. A list of point earning activities in each of these areas is sent to each new CFM. It is also available at www.ifma.org.

Online Communities –The online community platform serves to unite IFMA members to exchange best practices, documents and network online.

Online Learning Center – IFMA's growing library of comprehensive online courses that features online self study course modules developed from the nine facility management competencies and performance skills, as well as workshops, On-Demand Audio Seminars and additional FM resources.

Re-certification – All chapters and councils are required to submit this package annually and must use the forms provided by IFMA components team. The package must include completed and balanced statement of revenue and expenses, balance sheet, budget for current fiscal year, The package is due to IFMA on August 10th each year.

The WIRE – This biweekly e-mail newsletter highlights member benefits, Association events and other opportunities for readers to make the most of their IFMA membership.

Frequently Asked Questions...

Q) What are the requirements and what is the procedure for advancement to the Board?

A) Board members are selected based on a matrix of requirements. Knowledge of the Association, demonstrated leadership ability and a willingness to serve might be included in the consideration of an individual, however, each incoming chairperson determines the skills and abilities they feel will be needed to compliment the Association's needs. Leadership positions in chapters, council, committees or constituent groups provide valuable training and, contrary to popular opinion, one need not have served as president or chairperson of one of these groups to be appointed to the Board. IFMA's incoming chairperson fills vacancies on the Board prior to his or her installation in July. Anyone wishing to be considered for advancement to the Board should make their wishes known to Board or staff members, or directly to the incoming chairperson.

Q) What is the procedure for getting a presentation approved for an IFMA conference?

A) IFMA sends out a "Call for Presentations" for World Workplace, Facility Fusion and other industry related offerings. This format is the formal opportunity to submit a proposal for consideration by the program committees to offer a presentation.

The call for presentations sets forth the educational tracks which will be addressed at the conference, speaker requirements and collects the proposal abstract, speaker information and list of references.

All complete submissions received by the indicated deadlines are reviewed by the program committee for quality, focus and practical application of the material, previous speaking experience and professional qualifications. Those not selected to present, as well as those who are, may be considered for other IFMA conferences or seminars and/or referred to chapters and councils for local and regional programs. While the window of opportunity for conference submissions is rigorously enforced, ideas for future conference and seminar programs are welcomed year-round.

Q) What about serving alcohol at chapter functions?

A) Serving alcohol at functions is covered, but with important conditions. IFMA members may not serve alcohol to themselves or other members or non-members at any chapter/council events. All drinks must be served by employees of the host organization (hotel, country club, catering company, etc.) This is an important stipulation with being covered. This requirement extends to events like golf outings where a common past practice has been to have a member drive the 'beer cart' around handing out refreshment. Arrangements must be made with the host club to have employees distribute drinks on the course, as well as during meals and receptions.

For events held at a non-traditional meeting location, such as a park, alcohol service is covered only when provided by a caterer with primary liquor liability. This condition applies regardless of whether the event is set up with a 'cash' or 'open' bar.

Please contact IFMA or IFMA's insurance agent contact information.

Q) What exactly is the House of Delegates meeting at IFMA's World Workplace?

A) The House of Delegates gives delegates, representing membership assigned to chapters and at-large membership, a forum to interact with the Association's Board of Directors and staff regarding strategic initiatives of the Association. The House of Delegates meets annually in conjunction with the Association's annual conference. Voting must be done by delegates or their accredited alternate delegates who are Members, Associate members or Retired members of the Association. Delegates cannot vote by proxy. No delegate can represent more than one chapter. A letter is mailed annually to the chapter president with the number of delegates allowed in August. The chapter must submit which delegates will attend in advance.

Q) How can chapters be involved in community service projects?

A) Chapters should only get involved in community service projects when they have everything else in order. The type of community service projects the chapter chooses should be facility management related; advancing the profession through support of the IFMA Foundation should be a primary consideration. It is suggested that the chapter does not use any sponsorship money for community service projects.

Who to contact at IFMA

Components Team

- First point of contact at IFMA for questions, advice, concerns and assistance with strategic and succession planning; membership growth, development and retention; chapter programming and other activities and benefits.
- Assistance with Chapter Reports access.
- Contact components@ifma.org or call the team at 713-623-4362 option 6.

Member Services Team

- Responsible for incoming questions and /or requests made to IFMA via phone, ifma@ifma.org, Member Services is responsible for incoming questions and/or requests made to IFMA via phone, fax, e-mail, and web.
- Responsible for processing of membership, registration, and bookstore applications and orders.