



# 2013-2014 ANNUAL REPORT









The Atlanta Chapter of IFMA is the premier, focused resource for professional development and innovative solutions in strategic facility management.

## **PURPOSE**

Support a community that fosters vitality, momentum and impact for the facility management professional and associate members.

## **OBJECTIVES**

Provide and engage Chapter members with opportunities that expand their professional growth, build business relationships and advance their career paths.

Inspire passion for the facility management profession that compels and engages facility practitioners to join and participate in the IFMA network, offers unique value with that participation and attracts volunteer leaders.

Sustain Atlanta Chapter of IFMA's financial integrity to achieve and fulfill our mission.



My Dear Fellow Chapter Members:

Looking back on this past year in the life of the Atlanta Chapter, I stand in awe at the accomplishments that have taken place through the hard work and dedication of the membership. Much has already been said and written about all these achievements, not least in the pages of this Annual Report, and it would be redundant for me to detail them again in this message. I would like instead to take this opportunity to share some thoughts about my experience as president of this remarkable organization for the last twelve months.

First, surprise: surprise that I would even have been considered for this role, surprise that anyone would have entrusted me with their confidence that an introvert like me would have been suited for the job; surprise that somehow the chapter not only survived, but even prospered during my tenure. That says a lot more about the sterling qualities of the Chapter leaders and members who did the real heavy lifting than it does about anything I might have brought to the position.

Second, pride: pride that the Chapter reached for, and attained, such lofty goals in that one year; pride in the distinctions that were earned by my fellow members and having my name associated with them, even if only as the name on top of the org chart.

Third, humility: recognizing my own limitations and discovering the incredible resources that my colleagues in this organization can and did

bring to bear, both the wisdom that comes from long experience and the energy embodied in dynamic youth. It's been humbling indeed to see what such resources can do.

Fourth, pleasure: pleasure in the companionship of the members of what is surely one of the most outstanding organizations one could join as a facility professional.

Fifth, respect: respect for the dedication that I know every member has to his or her calling, whether as a facility management professional or as a member of the wider business community with whom every professional has an unbreakable bond.

There is much more that could be said, but I invite you instead to look through the pages of this Annual Report to see for yourselves the record of our past year's educational achievements, the networking events, the community service activities, and all the other facts that firmly establish our Chapter as a leader in the entire IFMA International organization.

Last but not least, I wish to once again thank the Sustaining Patrons whose support and guidance carry immeasurable importance in the success of the Chapter's work – past, present and future.

With my best wishes,

Ken Bryson

IFMA Atlanta President, 2013-2014



Executive Committee



Ken Bryson  
President



Joseph Geierman  
Vice President,  
President Elect



Kenneth Stephenson  
Vice President,  
Professional Development



Christy Lowell  
Vice President,  
Communication



Dan Walther  
Chapter Treasurer



Gean Leyba  
Chapter Secretary



Annette Gorelick  
Past President

Committee Chairs

Pete Van Cleave  
Associates & Special Events

Joe Carroll  
Career Management

Emily Perry &  
Rick Yarbrough  
Community Services

Tom Haslach  
Education

Dee Raya  
Foundation/Scholarships

Kathy Roper  
Georgia Tech Liaison

Brandi Williams  
Southern Polytechnic State University  
(SPSU) Liaison

Dawn Abraham  
Membership

Tammy Weeks  
Newsletter

Jeff DellaMaggiore  
Programs

Clara Smith  
Sustainability

Harry Ludwig  
Sustaining Patrons

Carrie May  
Emerging Leaders

Steve Christopher  
Spring Classic

Harriet Whelihan  
CFM Certification

Martha Smith  
Tours

Gold



Silver



Bronze



Patrons

Atlanta Flooring Design Center  
AVYVE  
Choate Construction/Interiors  
DTI

EMCOR Services Aircond  
Entek  
FLIK International  
Flood Brothers

Flooring Solutions  
Gensler  
Hendrick  
LCG-CI

MAXAIR Mechanical  
Steel Case  
Plant Peddler  
UPS





The IFMA Balanced Scorecard is a document containing seven objectives that give purpose to our association, the events scheduled and direction for interaction with its members throughout the year. Our monthly programs, associates committee, networking events, new member breakfast,

sustaining patron and association reception, community services and non-profit offerings remain strong. When coupled with the chapter's strong scholarships and IFMA foundation support program, we have been able to create something with real value for members and the community around us.





The Atlanta Chapter of IFMA is a tremendous venue for providing opportunities for its members to connect. Special tours and events, monthly luncheons, exceptional educational programs encourage building friendships

and strong business relationships for personal and professional growth. The Chapter also maintains robust mentoring programs for members who are new to the FM profession.







One objective of the IFMA Atlanta Chapter is to provide significant educational opportunities to FM professionals to advance their careers and expand their professional growth. Notably, our Chapter has received the distinguished

honor of being IACET accredited for many of its continuing education programs. IFMA Atlanta is the first Chapter in the international organization to receive this designation.









Many opportunities are available exclusively for FM professionals and associate members. Tours of interesting

facilities provide an opportunity that can not be experienced anywhere else.









The mission of IFMA Atlanta Community Services Committee is to assist nonprofit organizations in improving their facilities, maximizing the value of their facility dollars so that more funds can go to their program operations. From the formation of the Committee in 1997, we have grown from serving one Nonprofit Partner to serving twelve partners this past year. The Chapter also collaborates with the FM schools at Georgia Institute of Technology (GA Tech) and Southern Polytechnic State University

(SPSU) through established Liaison Committees. The Committees are made up of Accredited Degree Program (ADP) Faculty, Staff Advisors, Chapter members who are graduates of the FM Programs, Chapter Officers, and students currently enrolled in the FM Program(s). These Committees coordinate, support and direct shared goals of IFMA and each ADP to advance the FM profession. Additionally, the Chapter signed as a founding partner to the Atlanta Better Buildings Challenge (ABBC).









Association Headquarters (AHQI) is the organization behind the scenes that helps IFMA Atlanta run smoothly. It maintains a website event calendar, posts up-to-date job descriptions, and conducts member surveys for program

feedback. It also manages payments for luncheons, helps run meetings, manages our database and provides general administrative support. We are appreciative for all AHQI's support and effort.







IFMA Atlanta recognizes and congratulates members for outstanding achievement every year. The 2013 award recipients were:

Tom Haslach

*Outstanding Associate Award*

Wayne Stubbs

*Harry L. Ludwig, III Community Service Award*

Anthony Maddox

*Achievement in FM Award*

Clara Smith

*Martha Osborne CFM Award*

Joseph Geierman

*Distinguished Member Award*









The Board of Officers holds monthly meetings and an annual retreat to set goals for the coming year. Members

of the Board are dedicated to providing sound financial stewardship of the Chapter's funds and resources.









Each year, IFMA Atlanta members come together for a fun day of tennis, golf, cruising and dining in support of the IFMA

Foundation. A very special thanks to Steve Christopher and the rest of the Royal Cup Coffee crew for another successful event.







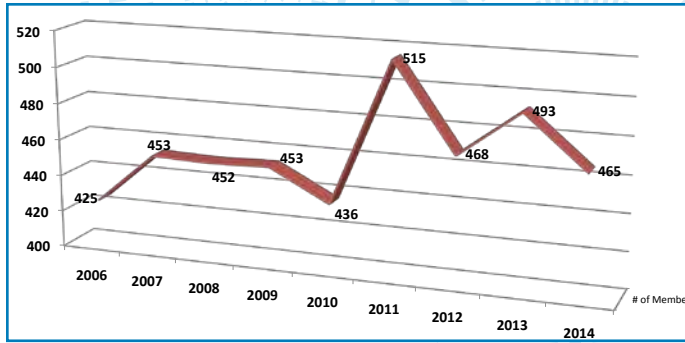




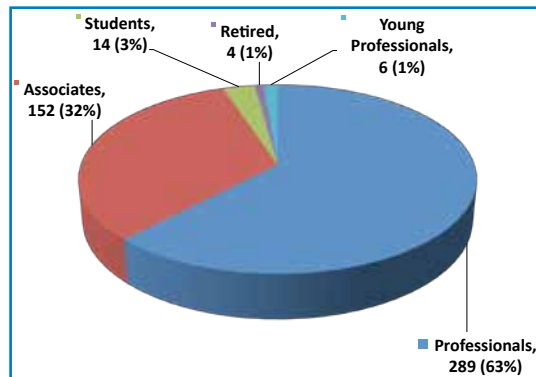




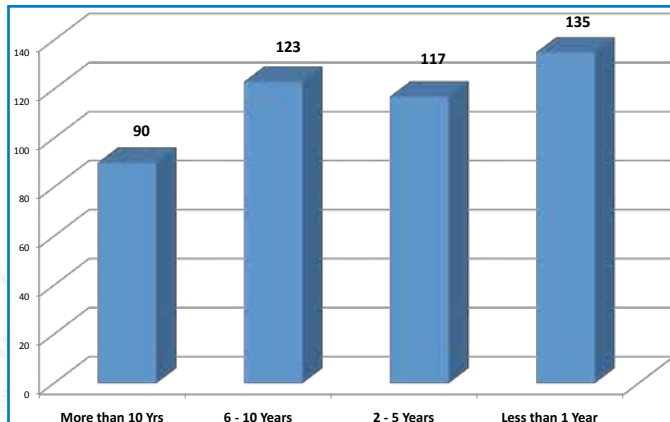
Membership Change by Year



Ratio of Membership Types - June 30, 2014



Membership by Tenure



IFMA Community Services Report for the period July 1, 2013 – June 30, 2014:

2013-2014 Nonprofit Partners:

- A Friend's House
- Atlanta Community Tool Bank
- Atlanta Mission
- Clarkston Community Center
- Covenant House
- Decatur Cooperative Ministry
- The Elaine Clark Center
- Furniture Bank of Metro Atlanta
- Project Community Connections
- Safe America Foundation

872 Volunteer Hours

\$49,959.29 In-Kind Donations to Nonprofit Partners from the following:

- Advantage Fire Inspections
- Decatur Cooperative Ministry
- Emery & Associates
- Flood Brothers
- Furniture Bank
- Georgia College
- IFMA Membership (December Luncheon)
- King & Spalding
- Maxair
- Neenah Paper
- Ricoh
- Ruppert Landscape
- Shalom Plumbing



## 2014 June—Month-end Atlanta Chapter Financial Snapshot

### Income Snapshot for July-June; FY Totals:

	FY Budget	FY Actual	Account particulars
Sustaining Patrons	90,000	84,098	June 1683; May 5583; April 3542; Mar 3758; Feb 24,867; Jan 9979; Dec 18,963; Nov \$9167; Support Funds Received throughout the year
Professional Development	42,500	45,122	June 6048; May 2945; April 180; Feb 4631; Jan 3777; Dec 4890; Nov 2383; Luncheon income \$40k of \$42.5k budget
Chapter Dues	43,400	41,050	June 4745; May 7782; Apr 0; Mar 8416; Jan 5965; Dec 0; Nov: 6417 (includes Oct); Sept 6051, Aug 1664; Received monthly from International
Interest Earned	-500	(405)	YTD Interest earned are fees from credit card use
Spring Classic	21,571	22,755	June 109; May 16,142; April 4460; Mar 171; Feb 1660; Aug 214; Classic numbers start to post in the Spring; (2013 FY total—Income + Expense+ Fund Raiser = \$20,785)
Associates & Events	5,000	4170	June 713; May 474; April 750; Feb 148; Nov 442; Oct 1260; Sept 325; Associates & Events; (2013 FY Income total 7153)
<b>Fund Raisers:</b>			May 4063; April 1835; Aug 2047; Spring Classic (2013 FY Income total 7458);
Spring Classic	10,000	7945	
To Be Named	5,000	603	Jan \$423 (30 <sup>th</sup> GALA 2013 FY Income total 2102);
Events	5,000	-0-	TBD
Special Event 2014 (Reserves)	6159	-0-	TBD
Emerging Leaders	500	-0-	
<b>Income Budget v Actual, July - June '14</b>	<b>\$228,630</b>	<b>\$205,338</b>	FY Income Budget/Actual =90% of Income Budget

### 2013-2014 Financial Overview:

Fiscal Year to Date: Income \$205,338 v \$204,244 Expense Budget Income - \$19,052/month avg  
Budget Expense - \$19,052/month avg

Actual Income - \$17,112/month avg using YTD figures  
Actual Expense - \$17,020/month avg using YTD figures

### June Particulars:

- \$13,297 June Income  
\$27,338 June Expense
- Chapter Dues:  
\$ 4745 June post closed the gap to finish the FY at \$2350 less than budget
- Donations of \$10k to GA Tech and \$5k to SPSU  
A great way to finish the fiscal year !

### Expense Snapshot July-June; FY Totals:

	FY Budget	FY Actuals	Account particulars
Sustaining Patrons	3,000	4534	Dec 4056; Oct 479; Budget for Sustaining Patron Reception in December
Administrative Expenses	79,475	75,820	June 6269; May 6548; Apr 6200; Mar 6200; Feb 6277; Jan 6262; Dec 6256; Nov 6316; Oct 6274; Sept 6278; \$6623/mth AHQI budget
Spring Classic	17,440	17,471	May 14,701; April 1770; Feb 1000; Classic numbers start to post in the Spring
IFMA ATL venue deposit	1,500	1500	April 1500; Venue deposit for 2015 event
Professional Development	51,255	41,412	June 4838; May 2845; April 50; Mar 2519; Feb 5523; Jan 5544; Dec 5062; Nov 322; Oct 4709; Sept 6765 Aug 25; July 3212; Meal Service is 40.9k of 51,255 Budget 80%
Board Meeting	300	198	Jan \$198
IFMA Leadership Training	3000	2870	June 643; May 1695 Fclty-Fsn; Feb 532; Facility Fusion, other events
Advocacy Day	1600	1369	DC Advocacy Day for 2 in September
Membership	5,000	4466	May 2558; Nov 1158; Oct 750; Orientation/Design/Printing
Emerging Leaders	1,000	-0-	
Associates	4,500	3593	Aril 1465; Nov 1104; Oct 438; Aug 585; Assoc's events and Sustaining Patron Event (?)
WWP (World Workplace)	4,250	4543	Nov (475); Oct 5518; Sept (500)Budget ~ \$1125 Chapter pins + 3100 Hospitality suite
Other Fund Raiser	2000	-0-	TBD events in the Income table above
Community Services	1,750	639	June 87; May 407; July 144; Partner Meeting Sponsorship; Volunteer Day
GA Tech Contributions	10,000	10,000	June 10k; GA Tech donations unrestricted;
SPSU IFMA Program	5,000	5,000	June 5k; Southern Ploy Tech U
a. IFMA Foundation Donation	7,500	3500	IFMA Foundation's donation; (Dec 3500),
b. IFMA Fndtn Scholarship	5,000	5000	Scholarship, and; WWP \$
c. WWP Expenses/Scholarship winner	1,000	1500	for scholarship winner
Sponsorships:			WWP-Oct 486;Sept 1716; Aug \$2004;IFMA ATL professional scholarship WWP @ 3 ea
IFMA Profnl WWP (3ea)	4,500	4205	
Discretionary Donation & GALA	1,000	398	Feb 100; Oct 248; Discretionary Donations, GALA
Communications:			
Electronic Newsletter	300	-0-	Electric newsletter, graphic design
Media & Public Relations	6,000	6000	\$500/month budget; Bounce path or other Service provider Dec 5313; Nov 1644;
Year End Report	8,260	6957	Print \$ + Prep \$ + Design \$
Website	3,000	3269	May 1077; April 974; Mar 357; Oct 114; Aug 747; 2k Develop + Maint Budget; Budget at 3750 Site redesign + Rebuild
<b>Expense Budget v Actual, July-June '14</b>	<b>\$228,630</b>	<b>\$204,244</b>	Expense Budget/Actual = 89%of Expense Budget

### Treasurer Notes:

1. Spring Classic \$5,175 (Income \$22,646 less Expense \$17,471)  
Fundraiser \$7,945 (consistent with 2013 FY Income total \$7458)  
TOTAL \$13,120
2. Outstanding job by the Sustaining Patrons committee receiving \$84k of \$90k budget.



**2013-2014 Board of Officers**

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Past President  
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**Committees**

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Chair - Tours  
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Chair - Golf/Tennis Classic  
Stephen Christopher  
Royal Cup Coffee  
stevec@royalcupcoffee.com


Chair - CFM Certification  
Harriet Whelihan  
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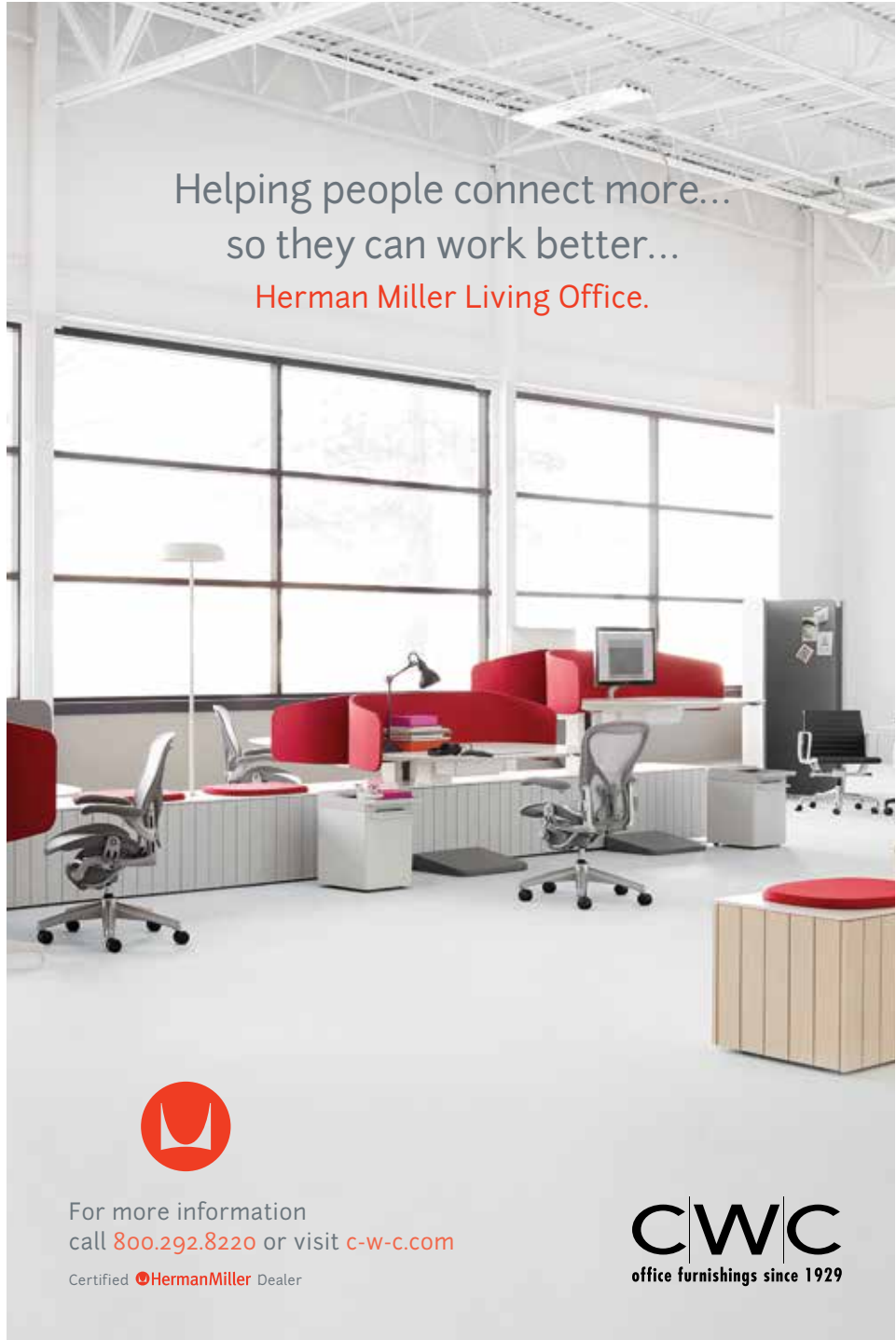
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