



2014-2015

Annual Report

Grow



Create



Engage



Inspire



Sustain



Special thanks to Joseph Geierman for the photography of the Atlanta Beltline, a former railway corridor around the core of Atlanta under development in stages as a multi-use trail. The trail has also been used for temporary art installations.

Our Mission

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.



President's Report

Members:

You are holding the Atlanta Chapter of IFMA's 2014/15 Annual Report. It is designed to inform you about the Chapter's doings over the last year. Also, to give you an idea about the group's strengths and some of its challenges. As you read it, I hope you're encouraged to get involved – this is a great organization that will only be stronger with your involvement.



Over the course of our Chapter's fiscal year that ended this June, we were able to accomplish a number of things aimed at increasing the amount of value we provide to our professional Facility Managers. These include holding a "FM Summit" last summer; hosting the 5th bi-annual Atlanta Workplace conference; offering multiple training sessions for

certifications like the CFM and SFP; and lowering the cost of monthly luncheons.

The chapter uses a "**Balanced Scorecard**" approach to identify its goals for the year, and track progress. You can see our 2014-15 "BSC" on Page 5. Each section of this report will tie back to the scorecard. You will see what we did to meet our goals, where we were successful, and where we need to do some more work in the future.

On a personal note, I'd like to thank you for the opportunity to serve as your President. I enjoyed and appreciated it. Even though I am no longer Chapter President, please feel free to continue reaching out to me for any assistance I can provide related to IFMA or Facility Management in general.

Delivered with much appreciation,

Joseph Geierman, CFM, FMP, MCR

Board of Directors

Executive Committee



Joseph Geierman
President



Christy Lowell
Vice President,
President Elect



Penny Whitlock
Vice President,
Professional Development



Pete Van Cleave
Vice President,
Communications



Emily Perry
Chapter Treasurer



Dawn Abraham
Chapter Secretary



Ken Bryson
Past President

Committee Chairs

Bob Mathis
Associates & Special Events

Joe Carroll
Career Management

Haydn Fusia
Community Services

Tom Haslach
Education

Dee Raya
Wendy Cowart
Foundation/Scholarships

Joyce Roper
Chapter Advisor

Lindsey Bradshaw
Membership

Joe Pearson
Programs

Clara Smith
Sustainability

Sheryl Yetsko
Sustaining Patrons

Anthony Maddox
Tours

Machelle Pellegrini
Atlanta Workplace 2015

Ken Stephenson
Accredited Degree
Program Liaison

Steve Christopher
Golf Classic

Harriett Whelihan
Joanne Cole
Credentialing

Sustaining Patrons

Gold



Silver



Bronze



Patrons

1electric
Atlanta Flooring Design Centers
Carousel Industries
Choate Construction

DTI
EMCOR Services Aircond Corporation
FLIK International
Gensler

Humphries & Company
Maxair Mechanical
Security 101
Steelcase

Balanced Scorecard

STRATEGIC OBJECTIVES

GOALS

Grow and Engage Professional Members

Evaluate Professional membership activity and participation; identify and implement ways to improve
Develop “the next generation” of Professional members (students)
Communicate with members across multiple media formats

Provide Educational Opportunities for Professional Development

Align the education we are providing with our Professional members’ needs.
Increase number of CFMs, SFPs and FMPs in the Chapter
Provide more opportunities for our Associate members to reach a broader range of Professionals

Provide Opportunities to Build Business Relationships

Provide opportunities for Associate member companies to showcase their companies’ goods and services
Engage Sustaining Patrons to take advantage of all program benefits

Collaborate with Strategic Professional Organizations

Continue sustainability work with USGBC-Georgia and Atlanta Better Building Challenge
Continue to strengthen partnerships through Atlanta Workplace (IIDA, ASID, USGBC-Georgia)
Continue to improve relationship with Georgia Center for Nonprofits; increase IFMA’s status within non-profit world

Streamline and Communicate Administrative Processes

Hold effective board meetings
Develop, update and communicate BSC to membership and board
Identify opportunities to streamline processes

Create Opportunities for Personal and Professional Growth

Engage a wider range of membership with Chapter’s activities
Ensure that there is a strong base of leadership to draw from for future boards.

Maintain Viable Fiscal Position

Committees should stay within (or under) budgets that were approved for the year.
Evaluate effects of luncheon price decrease on attendance
Evaluate effects of membership dues increase on overall membership
Continue to be a leading chapter in supporting IFMA Foundation

Grow and Engage Professional Members

The Atlanta Chapter made a special effort to reach out to Professional members this year to let them know what programs were being offered, as well as attempt to find out what they wanted from their membership. “Education” and “Certifications” was the answer we received back loud and clear. At right is an example of an e-mail that was sent out to one new member:



IFMA Members Hal Ayer (left) and Michael Marinosci (right) at the November luncheon

Dear [New Member]:

I am the president of IFMA's Atlanta chapter, and would like to thank you for your membership. This organization means a lot to me – mainly because of the education and connections to other professional Facility Managers it has afforded me. My goal this year is to do as much as I can to add to the value you get from being a member of IFMA Atlanta.

Here are some of the steps we've either taken already or will be taking soon:

- The price to attend one of our monthly luncheons went down from \$45 to \$30
- This year, we having the majority of our monthly luncheons at one venue: Maggiano's at Cumberland Mall, so you don't have to wonder about parking or directions changing each month
- We will be holding a Certified Facility Manager exam training class on March 13th – something we have not done for the past 3 years
- On February 20, we put on Atlanta Workplace, a 1-day conference with a wide variety of educational options (sustainability, operations, design), and managed to keep costs for attendees just \$99.
- We are trying to do a variety of activities at different times and in different places to allow you the most opportunity to get value from your membership.

I want to make this an organization that's giving you what you need, so please let me know what else we can be doing. If you're able to, please send me a note back to let me know: what are you hoping to get from your IFMA membership, and how I can I help you get that?

We have a number of opportunities to get involved in committees if you're interested in that – our Membership (a great way to connect with other Facility Managers), Community Services (which teaches the principles of FM to non-profits and provides other service for the community), and Programs (providing education at our monthly luncheons) committees all could benefit from more professional facility managers serving on them.

Feel free to reach out to me any time – my contact information is below. I look forward to seeing you at one of our chapter's upcoming events!

Sincerely

Joseph Geierman, CFM, FMP, MCR
President, IFMA Atlanta

Grow and Engage Professional Members

ADP Liaison

Our new Accredited Degree Program Liaison Committee worked to strengthen our connections to local schools and between Students and Professionals.



This event that was held at GA Tech in the Fall to connect students with mentors.

The **Community Services Committee** has long been one of the most active and most ambitious committees in the chapter. For the past several years, they have been teaching courses at the Georgia Center for Nonprofits. These courses have turned into a certificate course, which was offered in Fall 2014, and which we expect to be offering in subsequent years as well.



Students at the Georgia Center for Nonprofits Certificate Program for FM

Membership

The number of our Professional members stayed steady, and Young Professional and Student membership surged. At the same time, the Chapter's Associate membership dropped by 21%. One possible cause for the drop in numbers of Associate members may include a price increase that became effective in July 2014. A renewed focus on providing value to Associate members is part of the plan for 2015-16.

Provide Educational Opportunities for Professional Development

Professional Designations



Professional Designations are essential for helping Facility Managers advance their careers. Over and over again, IFMA Atlanta's members have asked for opportunities to study for and obtain certifications like the Certified Facility Manager (CFM), Sustainable Facility Professional (SFP) and Facility Management Professional (FMP).

The Chapter hosted two educational sessions in 2014-15 designed to prepare Facility Managers to take the Certified Facility Manager exam. So far, two individuals have received their CFM designations. More people are scheduled to take the class over the coming year.

Congratulations to the chapter's newest CFMs:



Jackie Gilmore



John Anderson

Jackie Gilmore, CFM, of State Farm
John Anderson, CFM, of CBRE

The **Sustainability Committee** held a study session for the Sustainable Facility Professional in early 2015. This was an exceptionally successful class with three people quickly achieving their designation.

Congratulations to the Atlanta Chapter's newest SFPs:



Clara Smith



Robyn Phillips



Amy LeBlanc

Clara Smith, CFM, FMP, SFD of CMS Enterprises
Robyn Phillips, SFP, of GE
Amy LeBlanc, SFP, of CBRE



An audience listens with rapt attention during the March luncheon..

Provide Educational Opportunities for Professional Development

Atlanta Workplace

On February 20, 2015, IFMA Atlanta hosted the bi-annual Atlanta Workplace conference at the Loudermill Center. There were educational tracks on Operations, Sustainability and Design, as well as two keynote speakers. CEUs were offered by the USGBC, IACET, and IIDA, as well as the Georgia Real Estate Commission. 96 people attended.



Most luncheons in 2014-15 were held at Maggiano's in Cumberland. Pictured is Vice President, Christy Lowell, at the buffet line during the November luncheon.

Ed Brownlee, Mary Porcelli, and Pete Van Cleave at the October luncheon.

Monthly Luncheon Price Cut

In July, 2014, the Chapter reduced the price to attend monthly luncheons from \$45 to \$30 and established a single venue for holding these events (Maggiano's Cumberland). The goal was to allow more Professional FMs to attend by removing cost as a barrier and also to remove the confusion that comes from changing venues month to month. These actions were not successful in raising the number of people who attend luncheons, despite also having mostly strong presentations.

Educational Luncheon Programs

The Atlanta Chapter of IFMA offered 4 programs in 2014-15 that offered IACET CEUs:

- The Economics of Ergonomics – August, 2014
- Gen Y in the US, India, and China – September 2014
- Globalization and its Impact on Facility Management – November, 2014
- How to Prevent Cyber Threats – January, 2015

Other luncheon programs offered this year were:

- Georgia Power Rebate Programs & Community Service Partner Recognition – July, 2014
- Learning to Surf Chaos (Getting things Done) – October, 2014
- Atlanta's City Energy Project – March, 2014
- Navigating the Hidden Job Market – Tips and Tricks from Recruiting Professionals – May, 2014
- The Essentials of Commercial Contracts – June 2014



Wayne Whitzell explains the principles of "Getting things Done" during the October luncheon



Jehan Spann, Wendy Cowart, and Antonio Brown at the June luncheon.

Provide Opportunities to Build Business Relationships

There were numerous opportunities for business relationships to be formed over the course of the 2014-15 year. In addition to the chapter's luncheons, we held a number of other fun events:

- IFMA Atlanta Spring Classic
- Atlanta Workplace 2015 Vendor Fair
- Associates Casino Night
- Sustaining Patron's Program
(Offers the opportunity for patrons to host board meeting luncheons - November 2014 board meeting held at Gold Level Patron CWC's office.)
- Holiday Luncheon



Atlanta Spring Classic



Atlanta Spring Classic Lake Lanier Cruise

Provide Opportunities to Build Business Relationships



IFMA Atlanta Board Meeting



Holiday Luncheon



Atlanta Workplace 2015 Vendor Fair



Associates Casino Night

Collaborate with Strategic Professional Organizations

Atlanta Workplace

As we planned Atlanta Workplace 2015, the Atlanta Chapter of IFMA partnered with a number of local organizations to create its educational content. These partnerships not only widened the pool of experts which the Chapter was able to draw from in preparing its design and sustainability tracks. They also widened the audience of potential attendees at the conference.

Accredited Degree Program Liaison

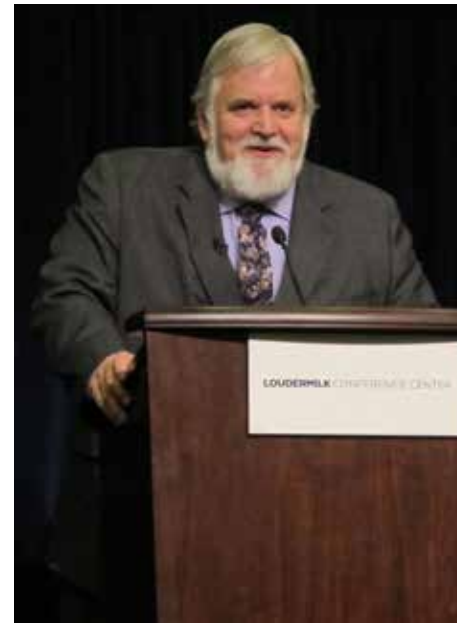
The Accredited Degree Program Liaison Committee, chaired by Ken Stephenson, began this year. Its goal was to better integrate IFMA into the two university-level programs it supports – the graduate program in FM at Georgia Tech and the undergraduate program at Kennesaw State University. They worked on connecting students with internships and mentors, as well as helping to facilitate a better pipeline from school to jobs.



Aaron Davis, speaking at Atlanta Workplace



Machele Pellegrini speaking at Atlanta Workplace



Keynote Michael Cheyne, speaking at Atlanta Workplace



Joyce Roper, speaking at Atlanta Workplace

Collaborate with Strategic Professional Organizations

Community Services Committee Nonprofit Partners

Each year the Community Services Committee works with a number of nonprofits to help them with their facilities portfolio and projects. This is the recognition

event held in July, 2014, for all our Nonprofit Partners – those completing their facility goals, those returning to continue work on their goals, and new partners to the program.



Recipients of 2013-14 Community Services Recognition for Nonprofit Partners

Collaborate with Strategic Professional Organizations

Community Services Committee Volunteer Day

The Community Services Committee also offers opportunities to get involved in the community in other

ways – including by helping with “Volunteer Day” projects. The picture below was taken during a demolition project IFMA participated in at the Tool Bank.



Streamline Communications and Administrative Processes

The Chapter continued to streamline its communications and administrative processes through:

- A balanced scorecard presented to members via newsletter, website and Annual Report.
- Collecting data on luncheon attendance and membership.
- Having a single meeting place that was easy to remember.

All of our initiatives would be impossible without the help of the team from Associated Headquarters (AHQI)



The AHQI Team:

Left to Right - Vernon Thomas, Lisa Thomas, Trisha Clark and Bob Thomas

Streamline Communications and Administrative Processes



2013-14 and 2014-15 IFMA Atlanta Board

Create Opportunities for Personal and Professional Growth

New Board Members

There were several new members on the IFMA Atlanta Board this year. Serving on the Board is an excellent way to understand how IFMA Atlanta works and to make lasting friendships with both Professionals and Associates.

- **Penny Whitlock**, CFM, of CBRE (VP Professional Development)
- **Joe Pearson**, of EY (Programs Committee Chair)
- **Wendy Cowart** of Mayberry Electric (Foundation and Scholarships Co-Chair)
- **Haydn Fusia** of Emery & Associates (Community Services Committee Chair)
- **Machelle Pellegrini** of State Farm Insurance (Atlanta Workplace Chair)
- **Bob Mathis** of Ricoh (Associates Committee Chair)
- **Brandi Williams** of Kennesaw State University (Sustainability Co-Chair)



Penny Whitlock



Joe Pearson



Wendy Cowart



Haydn Fusia



Machelle Pellegrini



Bob Mathis



Brandi Williams

International Awards and Recognition

The Chapter always has a strong presence at World Workplace, the international Facility Management conference held by our parent organization. 2014's conference in New Orleans was no exception.



Attendees from the Atlanta chapter at the World Workplace Awards Banquet



Anthony Maddox of Georgia State University was awarded with the "Emerging Professional" Award at World Workplace, which was presented to him at the October luncheon.



William Broome, CFM, SFP, of the Westminster Schools, accepts the Sheila Sheridan Award for Sustainable Facilities and Operations Award from Tony Keane, IFMA CEO, at World Workplace in New Orleans

Create Opportunities for Personal and Professional Growth



Left to right are Emily Perry, Dee Raya, Dawn Abraham and Dianne Adams

Chapter Awards

The Atlanta Chapter of IFMA believes it is important to recognize excellence in its members. We typically present these awards each year at our Holiday Awards Banquet. Emily Perry and Dawn Abraham both received awards for Outstanding Associates. Dee Raya received the Achievement in FM award. Dianne Adams received the Harry Ludwig III Community Service award. Penny Whitlock received the Martha Osborne CFM award. William Broome (above right) was honored with the Distinguished Member award.



William Broome, right, with the Distinguished Member Award

In January, 2015, Harry Ludwig retired from King & Spalding after 24 very successful years, where he completed more than 75 projects totaling nearly one million square feet. He has helped grow that firm from three offices to 17 - taking it from a regional to a truly global firm. In 1994, Harry stated that his personal style was to "Lead by Example" - Harry has done that in spades. Harry was President of our Chapter in 1996, and has stayed involved in the Board's operations ever since then. To recognize his service to FM and this Chapter, Harry was awarded with IFMA Atlanta's first ever "Anchor Award," honoring members who have not only achieved the highest level of professional accomplishment, but also provided a "Foundation" of consistent leadership for the Chapter.



Harry Ludwig with the Anchor Award

Maintain Viable Fiscal Position

Many thanks to Emily Perry, our Chapter Treasurer during 2014-15. Emily was a great steward of our resources, and streamlined many processes. Here is her report on key details for the year:

- We finished the year with a \$6,980.22 budget deficit. Though we held expenses down \$46,136.38 under budget, our income deficit was \$53,116.60.
- Overall, our Committees did very well with balancing income and expenses.
- Some key factors for the shortfall in total income: Sustaining Patrons income was \$13,393.21 under budget and Chapter Dues \$21,141.12 under budget. Though net income from our major fund raisers, AWP and Spring Classic, brought in \$15,590.75, the total was \$5,415.75 below projected net income.
- Still uncollected from Airport CFM course is \$1,430.00.
- Retained earnings as of 6/30/15 = \$229,191.34.

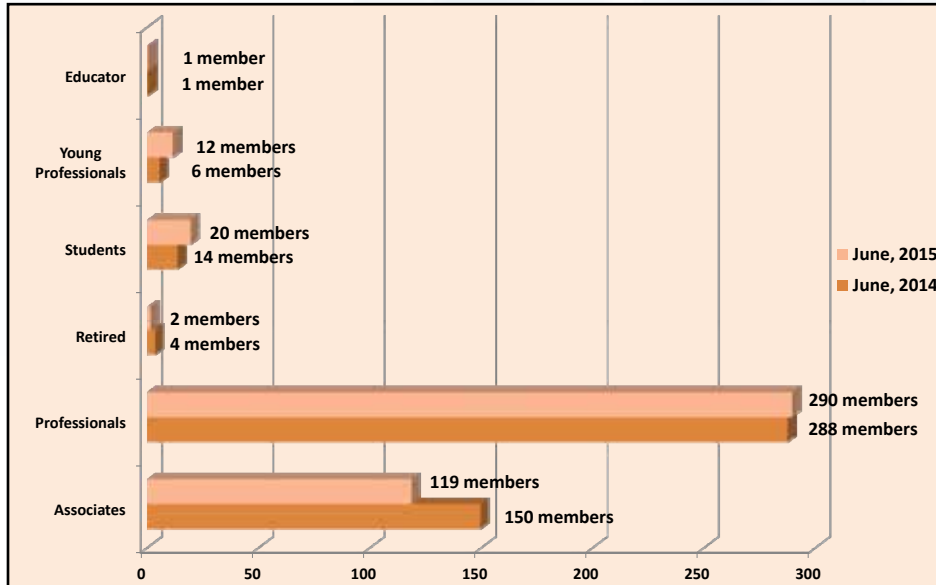


Emily Perry, Chapter Treasurer

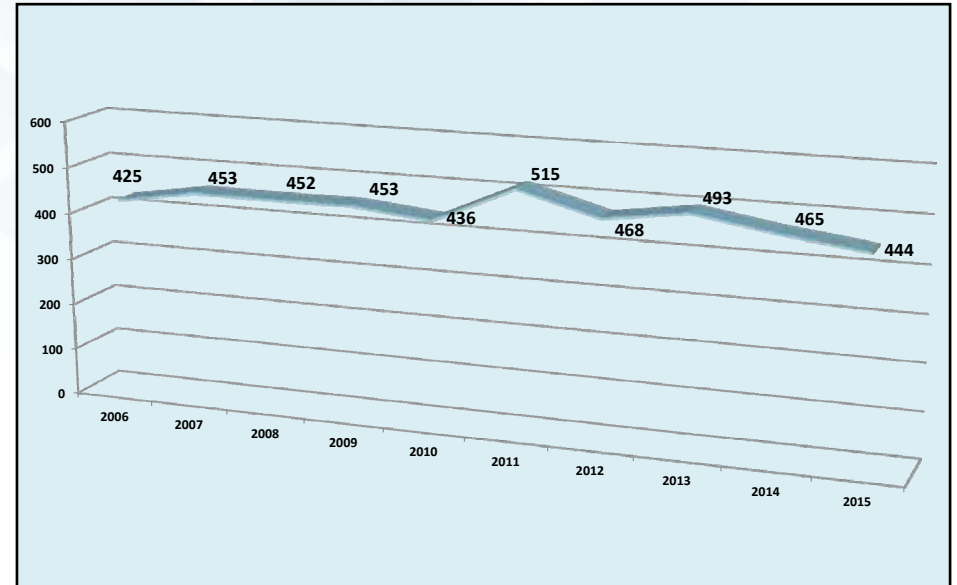


Financials and Membership

June 2015 IFMA Atlanta Membership by Category



Total IFMA Atlanta Membership by Year



IFMA Atlanta Community Services Report:

2014-15 Nonprofit Partners

- A Friend's House
- Atlanta Mission
- The Atlanta Community Tool Bank
- Covenant House
- Child Development Association
- Clarkston Community Center
- Decatur Cooperative Ministry
- The Elaine Clark Center
- Project Community Connections, Inc.

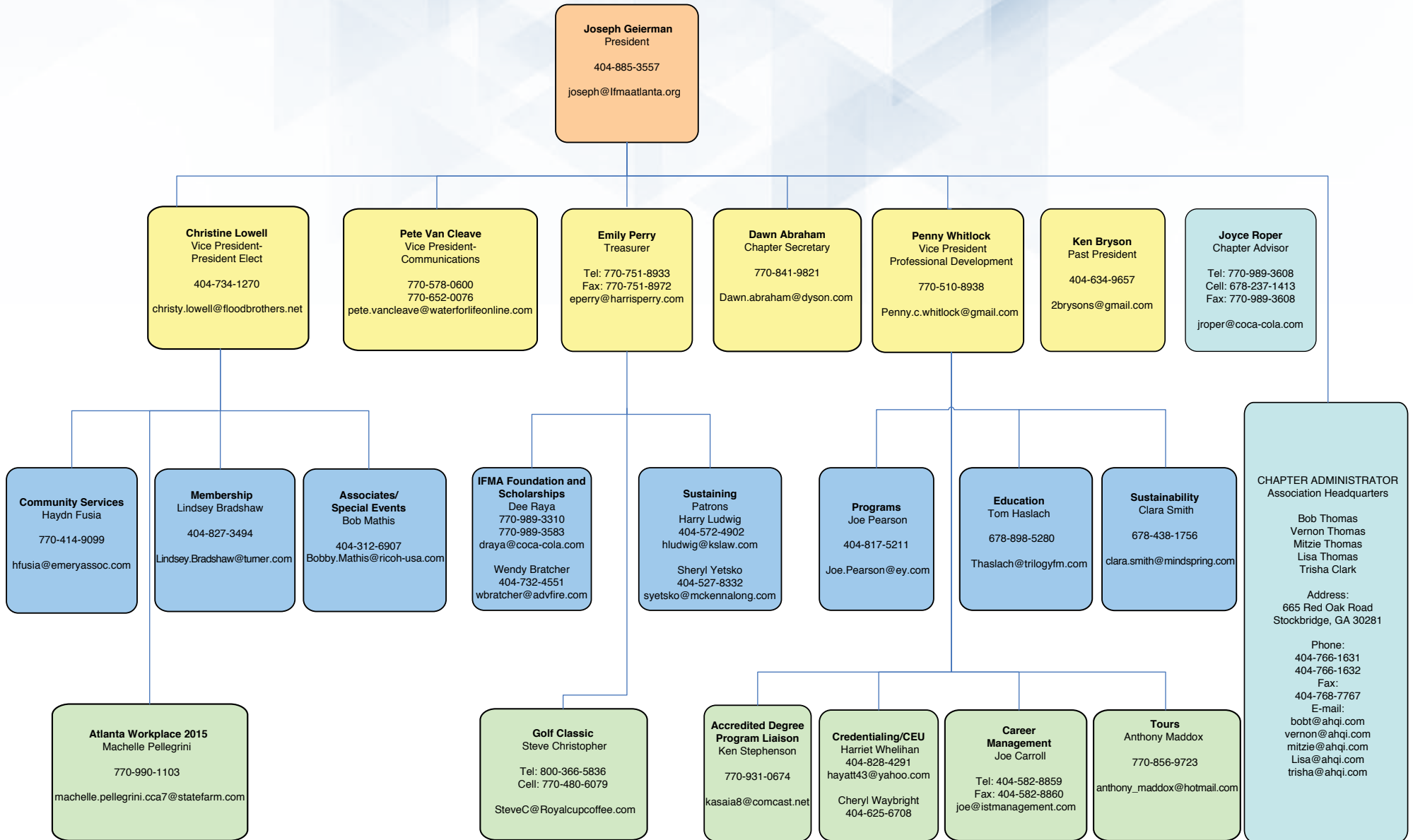
Number of volunteer hours spent by IFMA members in Community Service:

857

Amount of in-kind donations contributed and raised by IFMA members:

\$46,516.50

2014-2015 Board & Committees





International Facility Management Association
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U.S. POSTAGE
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