



# 2012-2013 ANNUAL REPORT ATLANTA CHAPTER OF IFMA



# 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.

Dear fellow Chapter Members,

As we reflect on this past fiscal year, the Atlanta Chapter of IFMA stands out as a leader among IFMA Chapters. We have made a real difference in facility management this past year. Our vision and mission are aligned with our Strategic Plan and this annual report highlights our major objectives and achievements:

- Grow and engage Professional members
- Provide educational opportunities for professional development
- Provide opportunities to build business relationships
- Collaborate with strategic professional organizations
- Streamline and communicate administrative processes
- Create opportunities for personal and professional growth
- Maintain viable fiscal position

Our Chapter continues to be an innovative Chapter that excels in multiple areas including professional development, FM education, an active member volunteer base, sound financial stewardship, community service, collaboration with accredited degree programs and other professional organizations, support of the IFMA Foundation, and extensive outreach in both our local and the larger international FM community.

The Chapter was instrumental in establishing the Facility Management graduate program at GA Tech, and has supported the program in numerous ways over the years (since 2000). We have taken a similar approach to the new undergraduate program at Southern Polytechnic State University (SPSU). In 2013, the Chapter held our biennial Atlanta Workplace educational conference, a noteworthy

achievement. We also continue our support of IFMA, our parent organization, as well as the IFMA Foundation. The Chapter sends active members annually to IFMA functions, and our members participate on IFMA committees.

Our most significant achievement this fiscal year is being approved as an International Association for Continuing Education and Training (IACET) Authorized Provider. IACET is the premier standards-setting organization for continuing education and training. IACET Authorized Providers are an elite group of educators dedicated to quality in continuing education and training. Consumers trust the IACET CEU because they know that the Authorized Providers' processes must follow the ANSI/IACET Standard for Continuing Education and Training and have been thoroughly assessed by a third party.

In short, the Atlanta Chapter of IFMA had an incredibly productive, award-winning, and precedent-setting year! It has been my pleasure to serve as your Chapter President. I extend my sincere thanks to all of our members, Sustaining Patrons, committee chairs, students and community partners. All of us should be extremely proud of these extraordinary accomplishments.

Regards,  
Annette Gorelick, LEED AP O+M  
Immediate Past President, Atlanta Chapter of IFMA





## Executive Committee

Annette Gorelick  
President



Ken Byson  
Vice President,  
President-Elect



Kenneth Stephenson  
Vice President,  
Professional Development



Joseph Geirman  
Vice President,  
Communication



Dan Walther  
Chapter Treasurer



Christy Lowell  
Chapter Secretary



Karen Howard  
Past President

## Committee Chairs

Pete Van Cleve  
Associates & Special Events

Joe Carroll  
Career Management

Emily Perry &  
Rick Yarbrough  
Community Services

Anthony Maddox  
Education

Dee Raya  
Foundation/Scholarships

Kathy Roper  
Georgia Tech Liaison

Khalid Siddiqi  
Southern Polytechnic State University (SPSU) Liaison

Dawn Abraham  
Membership

Tammy Weeks  
Newsletter

Gean Leyba  
Programs

Sharon Jaye  
Sustainability

Harry Ludwig  
Sustaining Patrons

Joseph Geierman  
AWP 2013

Carrie May  
Emerging Leaders

Steve Christopher  
Spring Classic

Harriet Whelihan  
CFM Certification

Pam Essler  
Tours



Gold



Silver



Bronze



Patrons

AVYVE  
Choate  
Corporate Environments  
CORT  
EMCOR Aircond Services

FLIK  
Flood Brothers  
Flooring Solutions  
Gensler  
Hendrick  
ICS Contract Services

LCG-CI  
Leapley Construction  
NatureScapes  
Plant Peddler  
TVS Design



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 chapters 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 following pages represent the different ways we have worked to support the seven objectives: Grow and Engage, Educate, Build Relationships, Collaborate, Streamline, Develop Leaders, and Maintain Fiscal Viability.



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, strong business relationships for personal and professional growth. The Chapter also maintains robust Emerging Leader and 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 all 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 members that are unique from other organizations. Tours of highly secured areas such as the Atlanta Hartsfield Jackson International Airport, Chick-fil-a Corporate, and the CDC have provided an opportunity that could not have been experienced anywhere else.



50/50 RAFFLE JACKPOT IS NOW: \$1,393





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. The Chapter maintains a website event calendar, up-to-date job descriptions, and conducts member surveys for program feedback. They manage payments for luncheons, help run meetings, manage our database and provide general administrative support. We are appreciative for all their support and effort.









Sharon Jaye was recognized by her peers at World Workplace 2012 in San Antonio as both the IFMA Distinguished Author and Distinguished Member Award Winner.

IFMA Atlanta recognizes and congratulates members for outstanding achievement every year. The 2012 award recipients were:

Pete Van Cleave

*Outstanding Associate Award*

Haydn Fusia

*Harry L. Ludwig, III Community Service Award*

Barbara Miller

*Achievement in FM Award*

Harriet Whelihan

*Martha Osborne CFM Award*

Gean Leyba

*Distinguished Member Award*







The Atlanta Chapter Board holds monthly board 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 crew for another successful event in April.





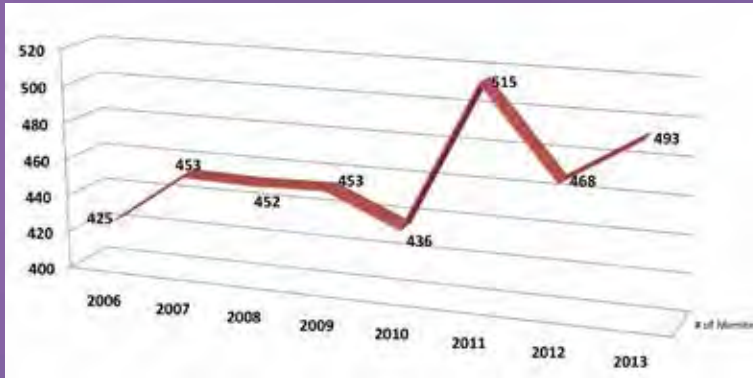


Atlanta Workplace 2013, a one-day conference held February 22, 2013 for building professionals, was a great success. At the outset, the organizing committee's goal was to hold a reasonably priced event (under \$100) with a strong focus on education and networking. With 180 registered attendees, 9 breakout sessions on operations, sustainability and design, 30 vendors presenting information at tabletop displays, and 2 keynote speakers who spoke about Atlanta's present and future – the committee's goal was accomplished! Thank you to the following chapter members for their help on the committee: Dawn Abraham, Meaghan Baker, Ken Bryson, Nancy Cartledge, Wendy Gill, Joseph Geierman, Annette Gorelick, Karen Howard, Sharon Jaye, Gean Leyba, Anthony Maddox, Lauren McLeroy, Christine Neldon, Merri Anne Pfeffer, Joyce Roper, Derek Rusch, Clara Smith and Ken Stephenson.

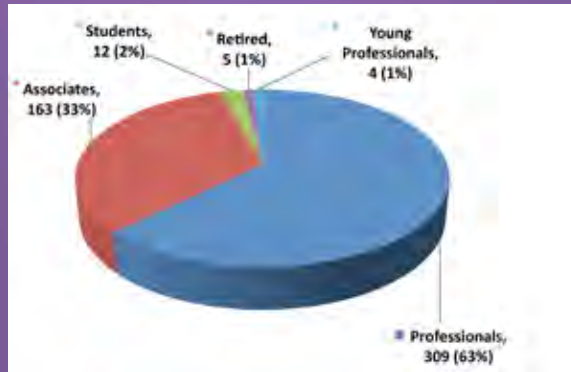




Membership Change by Year



Ratio of Membership Types - June 30, 2013



Membership by Tenure



Community Services Report

Companies and organizations who donated goods and services to our nonprofit partners through the Community Services Committee from July 2012 through June 2013 for a recorded total of \$59,854 were:

- Impact Office Interiors
- Duke Realty
- The Best Consultant
- AzkoNobel
- Green Solutions
- Reliant Construction
- CDC
- Ruppert Landscape
- Flood Brothers
- Alison-Smith
- IFMA Atlanta Membership (Holiday luncheon)
- Water for Life
- Royal Cup
- Maxair

The total recorded volunteer time to our nonprofit partners through the Community Services Committee was 1,131 hours.

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

	FY Budget	FY Actuals	Account particulars
Sustaining Patrons	90,000	93,750	June 1267; May \$10,867;3750; Funds Received throughout the year
Professional Development	81,700	36,370	June 7413; May 4781; Luncheon income \$60k of \$82k budget
IFMA ATL WP*	30,160	34,872	May 400; Feb posted \$19,607; Income less Expense = \$13,954
Chapter Dues	45,000	44,325	June 4948; May 8238; Apr \$0; Mar 4896; Feb \$7493; less \$405 YTD Interest earned 405; Received monthly from International
Spring Classic	23,783	19,036	June 166; May 14,547; Apr 1522; Classic numbers start to post in the Spring; <b>Income + Expense+ Fund Raiser = \$20,785</b>
Associates & Events	4,000	7153	May 3414; April \$60; Associates & Events
<b>Fund Raisers:</b>			
Spring Classic	10,000	7458	Spring Classic June 1250;May 2716; April 2492, Mar 1k;
30 <sup>th</sup> GALA	6,000	2102	30 <sup>th</sup> Gala--\$1522 posted in Sept
30 <sup>th</sup> GALA	9,500	14,030	Income for 30 <sup>th</sup> GALA
Other Budget Income	1,350	-0-	Community Service \$750
		-0-	Emerging Leaders \$500
<b>Income Budget v Actual, July - June 2013</b>			
	<b>\$301,493</b>	<b>\$259,098</b>	FY Income Budget/Actual = <b>86%</b> of Income Budget

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

	FY Budget	FY Actuals	Account particulars
Sustaining Patrons	3,300	2620	Budget for Sustaining Patron Reception in December
Administrative Expenses	76,075	79,998	June 10,572; May \$6161; April \$6068; \$6k/mth AHQI budget
Spring Classic	20,155	17,440	May 14,573; Apr 1867; Classic numbers start to post in the Spring
IFMA ATL WP	22,130	21,960	June 249; Mar 891; Feb \$17,799; Jan \$691; Sept posted \$1147 website; July '12 posted \$1147
Professional Development	83,500	44,246	June 5072; May 4450; Apr 2927; Mar 3370; Feb 2050; Jan \$11,385; Dec \$5199; Nov \$31; Sept \$2744 (Meal 2370); July--\$2700 Meal Service
IFMA Leadership Training	6000	2805	April 2805
Advocacy Day	1400	1620	Sept 988 post to Advocacy Day
Membership	5,000	4779	May 2084; Mar 500; Nov 1695; Orientation/Design/Printing
Associates	4,500	5441	May 406; Apr 551; Mar 246; Feb 2500; Oct 1738; Associates events and Sustaining Patron Event (?)
WWP (World Workplace)	4,225	5446	Budget \$1125 Chapter pins + 3100 Hospitality suite
30 <sup>th</sup> GALA	9500	7,911	Oct \$25; August post \$6476 for this Aug 2 event
Community Services	2,500	741	May 538; Partner Meeting Sponsorship; Volunteer Day, Summit LnL, Volunteer Appreciation Day
GA Tech Contributions	10,000	10,000	10k April; GA Tech donations unrestricted;
SPSU IFMA Program	5,000	5,000	5k April; Southern Ploy Tech U
a. IFMA Foundation Donation	7,500	7500	\$13,600 spend; \$13,500 TOTAL Budget for IFMA
b. IFMA Fndtn Scholarship	5,000	5000	Foundation's donation and scholarship; WWP \$ for scholarship winner
c. WWP Expenses/Scholarship winner	1,000	1100	
Sponsorships:			Apr 50; March 50; \$438 Dec; Nov;
IFMA Profnsnl WWP (3ea)	4,500	4552	--IFMA ATL professional scholarship WWP @ 3 ea, --
Discretionary Donation & GALA	1,000	1140	Discretionary Donations, GALA
<b>Communications:</b>			
Electronic Newsletter	2,600	-0-	Electric newsletter, graphic design at \$2k budget, etc
Media & Public Relations	6,500	6000	June 500; Bounce path or other Service provider
Year End Report	10,120	5302	Dec-\$5054;Budget@Print 4860,Prep 260,Design 5k
Website	5,750	7395	June 18; May 135; 2k Develop + Maint Budget; Budget at 3750 Site redesign + Rebuild
<b>Expense Budget v Actual, July-June 2013</b>			
	<b>\$289,855</b>	<b>\$247,995</b>	Expense Budget/Actual = <b>86%</b> of Expense Budget

Worthy Mentions:

- \$11,103 Overage to carry to FY 2013-2014 FY
- Sustaining Patron Annual receipt of \$93,750 Spring Classic.  
Income + Expense+ Fund Raiser = \$20,785
- \$44,325 ANNUAL Receipt for Chapter Dues \$4948 Chapter Dues posted for June 2013
- \$15,044 – June Income  
\$16,411 – June Expense
- Monthly Income averages to Date:  
Budget Income – 25,124/month avg  
Actual Income – 21,592/month avg using YTD figures
- Monthly Expense averages to Date:  
Budget Expense – 24,880/month avg  
Actual Expense – 20,666/month avg using YTD figures

Notes:

# IFMA AWARDS



Congratulations to the IFMA Atlanta Chapter for becoming Large Chapter of the Year and an authorized provider of IACET CEUs!

Along with the prestigious award for being named Large Chapter of the Year for 2012-13, IFMA Atlanta also has now become the first IFMA chapter to be able to offer Continuing Education Units (CEUs) under the auspices of IACET - the International Association for Continuing Education and Training, so that our Professional members have immediate access to CEUs through the Chapter's own programs.

2012-2013 Board of Officers  
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Past President: Karen Howard  
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Chair - Tours  
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Forecast Design Studio, LLC  
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Chair - Emerging Leaders  
Carrie May  
Gensler  
carrie\_may@gensler.com

Chair - Golf/Tennis Classic  
Stephen Christopher  
Royal Cup, Inc.  
stevec@royalcupcoffee.com

Chair - Atlanta Workplace  
Joseph Geierman  
joseph@geierman.net

Chair - CFM Certification  
Harriett Whelihan





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Return Services Requested

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