

# Year in Review 2012-13

## 2012-13 BOARD OF DIRECTORS

### Left to right — back row:

Jon Seller, first vice chair; William O'Neill, CFM.

### Second row from back:

Michael D. Feldman, FMP, CM; James P. Whittaker, P.E., CFM, EFP, FRICS, second vice chair; Joachim W. Hohmann, MSc, Ph.D., CFM.

### Third row from back:

Eric Teicholz, IFMA Fellow; Kevin B. O'Toole, CFM, NCARB; Tony Keane, CAE, president and CEO.

### Third row from front:

Stephanie Fanger, FMP, M.S., LEED AP, EDAC, IIDA; Francisco Abrantes, MBA; Maureen Ehrenberg, FRICS, CRE.

**Second row from front:** Kathy O. Roper, CFM, CFMJ, LEED AP, IFMA Fellow, past chair; Lesley Groff, CFM.

**Front row:** Marc S. Liciardello, CFM, MBA, CM, chair.

During the 2012-13 fiscal year the International Facility Management Association (IFMA) focused on investments in the Certified Facility Manager® (CFM) exam revision as well as relocating staff to its new Service Center of Excellence located in Houston, Texas, USA. The vision intended for the relocation was to deliver an effective and satisfying work environment that would support a distributed service model and implement strategies for long-term flexibility and operational sustainability. The capital expenditures in fiscal year 2013 for these two projects totaled US\$2.2 million. The return on this investment will be increased global participation in the CFM learning system and lower operating expenses.

## FINANCIAL STANDING

Total revenues for FY 13 were US\$12,663,107, up US\$85,209 from the previous year. Total expenses for the fiscal year were US\$13,107,190. Direct expenses associated with the delivery of products and services were US\$5,273,265, while indirect operational expenses were US\$7,833,925. Direct expenses increased 7 percent over the prior year in response to costs associated with education product development, cost of sales and credential expenses. With expenses exceeding revenues we ended with a deficit year. Total assets were US\$8,027,650 compared to US\$7,897,455 for the previous year. Please refer to the Statement of Financial Activities (fig. 1) and the Statement of Financial Position (fig. 2) in this report for additional information.

## MEMBERSHIP

IFMA surpassed a major milestone during the past fiscal year as it now has more than 23,000 members, more than 25 percent of whom reside outside of the United States. These members are part of 130 chapters throughout the world across 85 countries. Membership numbers for the 2012-13 fiscal year represent a 2.52 percent increase over the previous year. In 2012-13, the membership team focused on defining the value proposition of IFMA members and non-members in an effort to personalize the membership and customer experience. The membership team ran two member-centric focus groups at the 2013 Facility Fusion Conference & Exposition in Los Angeles, Calif., USA to begin the process of gaining deeper insight into the value of IFMA membership.

IFMA also introduced an exclusive member email sent quarterly highlighting a new and exciting member-only benefit. The benefits that were highlighted included access to an executive summary of a study that was done by the Continental Automated Buildings Association on intelligent buildings and the bid specification process and access to the annual energy efficiency indicator report. The success of this endeavor led to the creation of a benefit of the month program moving forward into FY 2013-14.

During FY 2012-13, IFMA continued to grow in the number of councils and communities offered to members. IFMA currently has 17 councils, including the Religious Facilities Council that was launched in the last fiscal year, and six communities, including the newly created Building Information Modeling and Public Transportation communities.

## **EDUCATION & CREDENTIALS**

The 2012-13 fiscal year saw the conclusion of the development phase of the credentials strategic plan which began with the 2009 Global Job Task Analysis (GJTA). Having revamped the Facility Management Professional® (FMP) credential and launched the new Sustainability Facility Professional™ (SFP) credential in previous years, the Certified Facility Manager® (CFM) credential was the final piece to be completed.

In order to provide FM practitioners and CFM candidates with a more robust yet flexible resource, all 11 competency areas were further developed into the new Facility Management Learning System (FMLS). For the first time, the FM body of knowledge has been further defined to provide the comprehensive knowledge base for the CFM exam. A new exam prep workshop focuses on the critical thinking skills and other techniques to enable CFM candidates to harness their FM work experience for application to the situational questions posed by the exam. Finally, a completely revised CFM exam was launched in June 2013.

The last step in the credentials strategic plan is to achieve accreditation by the American National Standards Institute (ANSI), the U.S. member body of the International Organization for Standardization (ISO). The process has begun and will continue until this world-class accreditation has been accomplished for all three IFMA credentials.

In 2010, the U.S. enacted the Federal Buildings Personnel Training Act (FBPTA) to facilitate the development and maintenance of a high performance federal buildings workforce capable of maximizing

productivity while minimizing cost and resource use. Various government agencies have developed competency specifications for this workforce in order to identify and approve the specific education and credentialing programs which will aid in reaching the act's goal. In order to solidify IFMA's position at the forefront of FM professional development, comparison of the federal competencies with the IFMA competency areas has been an ongoing project since 2011.

IFMA also began the development of the Essentials of Facility Management Program, an entry-level training product to meet the educational needs of emerging FM professionals in the global market. The program content is focused on the basic concepts that describe the field of facility management and how it can be of value to an organization. The primary focus is to address the supervisor or unit leader's role in tactical planning of scheduling and accomplishing daily FM tasks that support the operation of an organization's facilities. The program consists of three workshops: 1) Introduction to Facility Management Series; 2) Operation and Maintenance Series; and 3) Work Management in Facilities Series. The Operations and Maintenance Series was completed in the spring of 2013 and piloted in India in April 2013.

In January 2013, a building information modeling (BIM) series of four webinars was developed by the BIM Lifecycle Operations Community and IFMA education as a means to raise awareness of BIM educational content and the voice of the owner, operator and facility management community. The sessions included in this series are Building Information Model Fundamentals, How Integrated Project Delivery and BIM are Used to Provide Value for your Capital Projects, Evolving Technologies for BIM Enabled Projects and Capturing and Sharing BIM-related Information.

At the close of the fiscal year, credential numbers stood as follows:

- CFM: 2,987
- RCFM: 288
- FMP: 4,055
- SFP: 348

In the summer of 2012, the IFMA credentials department completed the credential application and maintenance program (CAMP). All credential applications, renewal forms and payments are now processed electronically through CAMP. A user's guide is available and can be downloaded from the login page of the program. The implementation of the program has reduced the amount of time required to process applications and renewals and allows for credential holders and applicants to follow the progress of their credentialing process within their CAMP record.

## RESEARCH

In October 2012, IFMA released its Workplace Amenities Strategy, and in February 2013 it released Benchmarking 2.0 for Health Care Facilities in partnership with the Health Care Institute, the American Society for Healthcare Engineering and the Canadian Healthcare Engineering Society.

IFMA continued its partnership with Johnson Controls on the 2012 Energy Efficiency Indicator, a study related to energy management and investment decisions in commercial and public sector buildings. 2013 is the sixth year of this study, which will be showcased at IFMA's 2013 World Workplace conferences in Asia and North America.

As part of a commitment to ongoing product improvement, IFMA is gathering extensive requirements for the next iteration of its benchmark exchange for research and reports. Development is underway and the newly enhanced platform is anticipated for January 2014. An essential new function members will see is the ability to benchmark to key performance indicators unique to their industry.

In 2011, the International Organization for Standardization (ISO) established a committee to develop global standards for facility management (ISO/TC 267). In keeping with its mission to advance the FM profession, IFMA and alliance members from many countries are participating in this important effort. Additionally, IFMA has taken a leading role as administrator of the U.S. Technical Advisory Group. In the first phase, the ISO Technical Committee is focusing on defining facility management, its scope, terms and definitions and guidance on the sourcing and preparation of FM agreements.

## KNOWLEDGE STRATEGY

IFMA has prioritized knowledge strategy in an effort to align information to a specific purpose: to better guide and develop the growth of members and advance the FM profession. To bring long-term focus to this goal, IFMA created a knowledge librarian position in late 2012 to work with a cross-departmental team to develop an overall knowledge strategy. Currently in the research stage, this strategic work will result in the development and implementation of a systematic set of processes, quality mechanisms and strategic architecture to curate timely, relevant FM content to support users' needs.

## EVENTS

Despite the ravages of Hurricane Sandy in October 2012, IFMA's World Workplace North America was a

big success. Although the storm landed on the U.S. East Coast where the biggest concentration of members reside, IFMA's 33<sup>rd</sup> annual conference and exposition attracted almost 4,200 attendees from 46 countries to San Antonio, Texas, USA. Los Angeles, Calif., USA was the host for the fourth annual Facility Fusion Conference & Exposition which brought together more than 1,129 workplace professionals. There were a total of 94 exhibit booths on the floor, up from 73 the prior year.

The event was held at the JW Marriott Los Angeles L.A. Live which has earned the U.S. Green Building Council's Silver Leadership in Energy and Environmental Design certification. This prominent distinction recognizes the high-rise tower as an environmentally responsible, profitable and healthy place to live and work. The first annual IFMA Foundation Facility Fusion Golf Tournament was held in L.A. at Brookside Golf Club, designed by famed golf architect William P. Bell. The golf tournament attracted almost 200 golfers — a Foundation record. The Southern California chapters of IFMA (the Los Angeles, Orange County and San Fernando Valley Chapters) helped to make Facility Fusion 2013 a success.

IFMA held its second annual World Workplace Asia conference in Singapore July 25-27, 2012. The conference was a joint effort by IFMA, BCA (Building Construction Authority) and the Singapore Chapter of IFMA. The event was held at the Raffles City Convention Centre. The theme for the event was "Asia Pacific facility management: Smart facilities, unlimited opportunities." More than 400 attendees were present at this dynamic, multi-disciplinary event.

## COMMUNICATIONS

Facility Management Journal, the association's flagship publication, continued in both its traditional print and online format. To expand online content offerings, emphasis was given to complementary article resources — including videos, podcasts and international articles, as well as links to research and whitepapers. In addition, FMJ authors in FY 2012-13 were required to submit FMJ blog posts to further promote discussion on their article topics.

Social media continues to be an important element of the business community, including for both facility professionals and IFMA. Participation in IFMA's social media venues increased dramatically during the fiscal year in LinkedIn (26,596 group members), Twitter (10,504 followers), Facebook (3,347 likes) and YouTube (210 subscribers). Social media not only gives

workplace practitioners the opportunity to stay up-to-date on association offerings but also provides a vehicle for discussion of FM trends.

## **EXTERNAL AFFAIRS**

IFMA's government affairs program continued to gather visibility and credibility in the 2012-13 fiscal year. Having completed its largest ever Advocacy Day & Public Policy Forum in September 2012 with more than 200 participants, the size and reach of this growing benefit of IFMA membership is increasingly clear.

IFMA's government affairs team devoted its efforts throughout the year to effective implementation of the Federal Buildings Personnel Training Act, expansion of the High Performance Buildings Congressional Caucus and to establishing a greater government affairs presence in Europe and beyond. The culmination of these efforts includes recognition by the U.S. federal government, the largest property owner in the world, of the unsurpassed value of IFMA education and training, a government leaders session at the European Facility Management Conference with representation from nearly every continent and the emergence of IFMA as the global conduit for information sharing on public policy that affects the built environment.

As part of IFMA's ongoing effort to continue to magnify the importance of the facility manager, a new external communications manager was hired in January 2013. This role was developed to work with IFMA leaders to identify media opportunities, shape messaging and assist members in effectively communicating the value of FM. A new initiative for the coming fiscal year, dubbed the Media Mavens program, will help train and connect IFMA subject matter experts with members of the press.

## **SUSTAINABILITY**

Through engagement with the board, sustainability committee, staff, IFMA Foundation, components, members and stakeholders the strategic theme of sustainability continues to permeate the organization horizontally and vertically. FY 2012-13 brought forth the development of new programs to ensure that the association's practices, products and services are in alignment with its sustainability goals. This includes the sustainable exhibitor scorecard program, measurement of the overall carbon footprint of IFMA's conferences and the launch of an ongoing review of the related economic, environmental, social and governance performance of the organization. In addition, a key program this past fiscal year was engagement in the relocation project, from site selection and construction

to change management, to ensure that sustainable tactics were implemented.

Collaboration and dialogue with sustainability liaisons and SFP champions at the local/regional level to promote the SFP designation and enhance the capacity of members to meet the challenges of sustainable facility management and drive the integration of sustainability within organizations is ongoing. The number of universities that offer the SFP has increased, due in part to IFMA's partnership with Rice University as it became the first university to offer the SFP program on a purely virtual platform.

The sustainability program is currently focusing on three areas: knowledge management, communications and measuring, monitoring and reporting science. Knowledge management continues to provide strategic guidance for sustainable facility management resources. Enhancing communication about the SFP with an emphasis on how FMs can drive the integration of sustainability within organizations is another area of importance. The focus on measuring, monitoring and reporting supports the coordinated delivery of tools and resources for efficient and effective facilities.

Since 2011, IFMA has been gathering building energy performance information through the IFMA ENERGY STAR® Challenge. The association now has access to rich comparative data that can help members benchmark and manage building performance. Comparing similar types of facilities will enhance the ability of FMs to make intelligent, data-driven decisions.

## **IFMA: POISED FOR SUCCESS**

IFMA headquarters, now officially renamed the Houston Service Center of Excellence (SCOE), relocated at the end of December 2012. Over the last few years the association has reinvented the way it supports the ability to provide quality services to members and stakeholders and was in need of a work environment reflective of the leading edge of the facility management profession. Thoughtfully created through an integrated approach that brought together board members, staff, IFMA members and other stakeholders, the new SCOE is on track to deliver an effective and satisfying work environment, support a distributed service model and implement strategies for long-term flexibility and operational sustainability. Six-month post occupancy survey results indicate 80 percent overall workplace satisfaction as opposed to 36 percent from the employee workplace performance survey completed a year prior to relocation.

Last fiscal year IFMA undertook a major overhaul of its website with the goal of furthering members' professional development and individual job performance by providing engagement, resources, information, training and other benefits. For greatest efficacy, the website needs to reflect unity and present a collective voice for the profession, fostering an affinity for IFMA as that voice. The project focused on promoting the IFMA vision and strategic plan, unifying sites (FMJ, FMJ Blog, IFMA Community, FM Guide Online and JobNet) and expanding opportunities for learning and contributions by being more sociable and community oriented and better supporting knowledge sharing for facility managers.

A carefully crafted project plan that included a scheduled solution to accomplish the final outcome, as well as a performance measurement plan to weigh execution against objectives, was developed and implemented. IFMA's revamped mobile-friendly responsive website was launched as scheduled on Sept. 7, 2012 and has continued to evolve under the collective understanding that a website should be a continuous work in progress.

By engaging in internal development while continuing to enhance value for stakeholders, IFMA has ensured it is well placed to serve the current and future needs of its membership, as well as the industry at large. It is through the commitment of dedicated facility management professionals to ongoing improvement and workspace excellence that IFMA is able to achieve gains on behalf of the industry. IFMA's continued successes exist to "empower facility professionals worldwide."

On behalf of the board of directors and staff, thank you for your contributions and for your membership in the world's leading facility-related organization — IFMA.

Sincerely,



Tony Keane, CAE  
President and Chief Executive Officer



Marc S. Liciardello, CFM, MBA, CM  
Chair, 2012-2013 Board of Directors

In June of 2013, IFMA announced its newest alliance partnership with the Bulgarian Facility Management Association (BGFMA). IFMA alliance partnerships provide members of global facility-related organizations with select IFMA member benefits directed at individual skill development. Members of IFMA alliance organizations become "custom" members of IFMA with the ability to determine what information they wish to share with, and receive from, IFMA based on their unique individual needs. BGFMA is the second partner in the heralded IFMA alliance, following the induction of Facility Management Nederland (FMN) during the 2011-12 fiscal year.

IFMA also continued to increase its presence in the rapidly expanding Indian FM community. At the January 2013 FM Congress in Bangalore, India, IFMA Chairman Marc S. Liciardello, CFM, MBA, CM addressed the expanding role of facility management around the globe, highlighting the tremendous opportunity for growth in an economy as large as India's. FM Congress is a one-day conference addressing the needs of the facility management profession in the current economy.

# International Facility Management Association 2012-13 Financial Information\*

<b>CONDENSED STATEMENT OF FINANCIAL ACTIVITIES</b>		
<b>Revenue</b>	<b>30-Jun-13 (unaudited)</b>	<b>30-Jun-12</b>
Member dues and fees	\$4,160,067	\$4,073,396
Conferences and exhibitions	\$3,753,529	\$3,831,887
Professional development	\$3,453,719	\$3,475,234
Publications and information sales	\$909,366	\$929,229
Foundation administrative fees and other	\$386,426	\$268,153
<b>Total Revenue</b>	<b>\$12,663,107</b>	<b>\$12,577,899</b>
<b>Expenses</b>	<b>30-Jun-13 (unaudited)</b>	<b>30-Jun-12</b>
Program	\$8,370,803	\$7,915,902
Management and general	\$3,321,748	\$3,054,167
Membership maintenance and development	\$1,594,439	\$1,495,918
<b>Total Expenses</b>	<b>\$13,286,990</b>	<b>\$12,465,987</b>
Changes in unrestricted net assets from operations	(\$623,883)	\$111,912
Non-operating item net investment return (loss)	\$346,987	(\$83,951)
Change in unrestricted net assets	(\$276,896)	\$27,961
Unrestricted net assets, beginning of year	\$3,032,771	\$3,004,810
Unrestricted net assets, end of year	\$2,755,875	\$3,032,771

FIGURE 1

<b>CONDENSED STATEMENT OF FINANCIAL POSITION</b>		
<b>Assets</b>	<b>30-Jun-13 (unaudited)</b>	<b>30-Jun-12</b>
Cash and cash equivalents	\$208,140	\$418,310
Accounts receivable, net	\$354,204	\$574,444
Prepaid expenses and other assets	\$480,169	\$618,064
Investments	\$3,994,951	\$4,641,314
Program development costs, net	\$897,113	\$1,003,483
Property, net	\$2,093,173	\$641,840
<b>Total Assets</b>	<b>\$8,027,750</b>	<b>\$7,897,455</b>
<b>Liabilities</b>	<b>30-Jun-13 (unaudited)</b>	<b>30-Jun-12</b>
Accounts payable and other accrued expenses	\$1,243,607	\$806,750
Deferred revenue	\$3,547,995	\$4,057,934
Note payable	\$480,173	
<b>Total Liabilities</b>	<b>\$5,271,775</b>	<b>\$4,864,684</b>
Unrestricted net assets	\$2,755,975	\$3,032,771
<b>Total liabilities and unrestricted net assets</b>	<b>\$8,027,750</b>	<b>\$7,897,455</b>

FIGURE 2

\*All amounts listed in U.S. dollars