



JUSTIFICATION OF excellence

1. Summarize the basis for this nomination.

Nominating Statement: IFMA Oregon & Southwest Washington (OSWW) nomination for Chapter of the Year is grounded in a commitment to becoming excellent because excellence is not an event here:

It is a daily system of transparent governance, intentional collaboration across chapters and continents, and measurable member impact, strengthened by global leadership roles and a replicable model for women in FM.

What Makes OSWW Excellent: OSWW has built systems-based collaboration through **THREE CORE STRENGTHS**. First, governance innovation: our Advisory Committee of past leaders ensures leadership continuity, institutional knowledge transfer, and strategic mentorship. We've implemented formal conflict-of-interest protocols that build trust and transparency. Second, our FM Women's Connect initiative has delivered sold out events and attracted interest from IFMA Fellows for chapter wide scaling creating a replicable model now being formalized for other chapters. Third, despite our regional footprint, OSWW maintains extraordinary global integration: our members serve on IFMA's Global Board, Foundation Board, and Sustainability Board, while facilitating peer exchanges with chapters in Mexico and the Caribbean.



IFMA OSWW Symposium

1 GOVERNANCE INNOVATION

Our Advisory Committee of past leaders ensures leadership continuity, institutional knowledge transfer, and strategic mentorship. We've implemented formal conflict-of-interest protocols that build trust and transparency.

2 FM WOMEN'S CONNECT

The initiative has delivered sold out events and attracted interest from IFMA Fellows for scaling creating a replicable model now being formalized for other chapters.

3 GLOBAL INTEGRATION

Our members serve on IFMA's Global Board, Foundation Board, Sustainability Board, and FM Consultants Council while facilitating peer exchanges with chapters in Mexico and the Caribbean.

Measurable Impact: Cross committee planning and shared metrics enabled 30+ volunteers to deliver 12 major programs with increased member satisfaction and zero burnout. Our transparency systems and international collaboration have strengthened member engagement, volunteer retention, and award readiness.

Basis for Nomination: This nomination rests on three pillars:

GOVERNANCE INNOVATION

Advisory Committee structure, transparency protocols, and conflict-of-interest management

REPLICABLE MEMBER IMPACT

FM Women's Connect model being adopted by other chapters

DEEP IFMA ALIGNMENT

Global board representation, Foundation and Sustainability board service, Chapter Champion roles, and documented international peer exchanges

These are not aspirations, they are documented practices with demonstrated outcomes in member engagement, volunteer capacity, and cross-chapter influence.



PDX Airport Tour



Providence Park Tour

I joined IFMA to connect with other facilities professionals who understand that no two days are ever the same. It's a place to share real world experiences, learn what works, and realize you're not the only one juggling aging systems and last-minute surprises. IFMA helps me keep learning, stay grounded, and bring better solutions back to my team.

Joe Deherrera, CFM -
Director of Facilities - OPB

2. What has been the most successful strategy for membership marketing? Describe in quantifiable terms how this strategy has strengthened the chapter. How is this strategy tied into the chapter's strategic plan?

Most Successful Strategy: Personal, Peer-to-Peer Invitation

Our chapter's single most successful membership marketing strategy is personal, peer-to-peer invitation. A current member directly asking a qualified non-member colleague to attend an event or join the chapter. This approach consistently outperforms all digital channels in both conversion rate and new member retention.

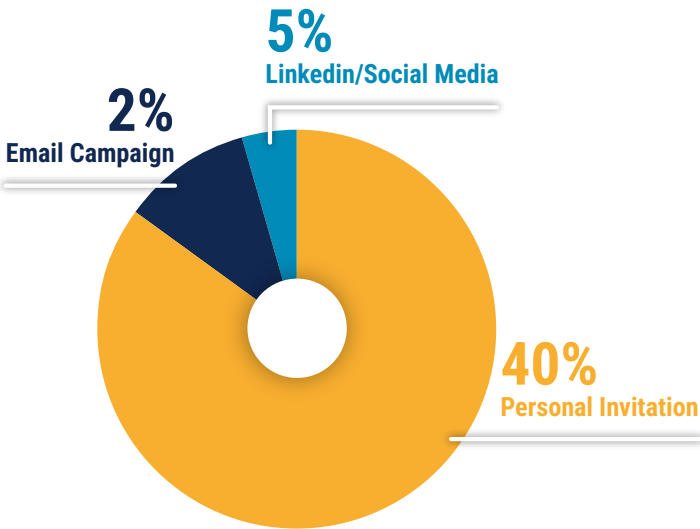
Why It's Most Successful: Quantifiable Performance

Personal invitations convert at approximately 40%, significantly outperforming our digital channels:



Tabling at OSFMA Tradeshow

Strategy Conversion Rate



Of the 32 new members added in the past 12 months, 21 (66%) joined after a personal invitation. Their 12-month retention rate is 90%, compared to 60% for members acquired through digital channels.

How It Strengthened the Chapter:

Members recruited via personal invitation demonstrate significantly higher engagement:

- Attend 2.5 more events per year than digitally acquired members
- Are 3x more likely to volunteer within their first 6 months
- Generate stronger sponsor engagement, with sponsors now requesting introductions, increasing sponsorship renewal by 15%
- We achieved 6% membership growth (from 250 to 258 members) while reducing digital marketing spend by 30%

How the Strategy Works

We've formalized personal invitations through several interconnected tactics.

IFMA 5 Free Campaign: In June of 2026 we added an additional 5 new members using "IFMA 5 Free" bringing our new member count to 258. Our chapter uses a membership scholarship application to screen potential new members to ensure they qualify for the free membership. In addition to the "IFMA 5 Free" base membership our chapter also gifts them with our chapter membership.

Event-Based Recruitment: Our highest conversion opportunities include:

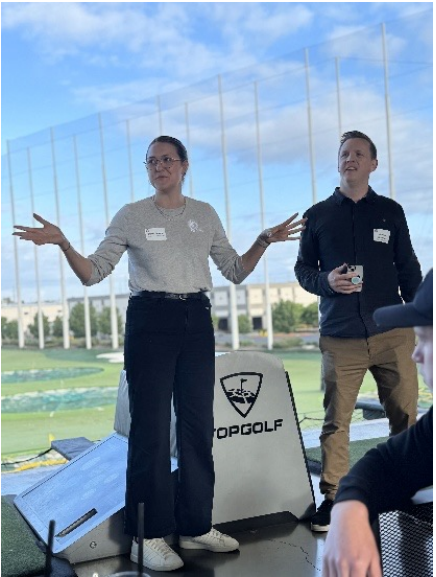
- Site tours where guests experience member value firsthand
- Annual Symposium with dedicated prospective member sessions
- Golf Tournament networking
- World FM Day celebrations that generate guest attendance, followed by personal follow-up from the member who brought them

Structured Follow-Up Process: The Membership Committee provides systematic support through email, phone calls, and one-on-one lunches to answer questions and discuss membership benefits, including pathways to FMP, SFP, and CFM certifications.

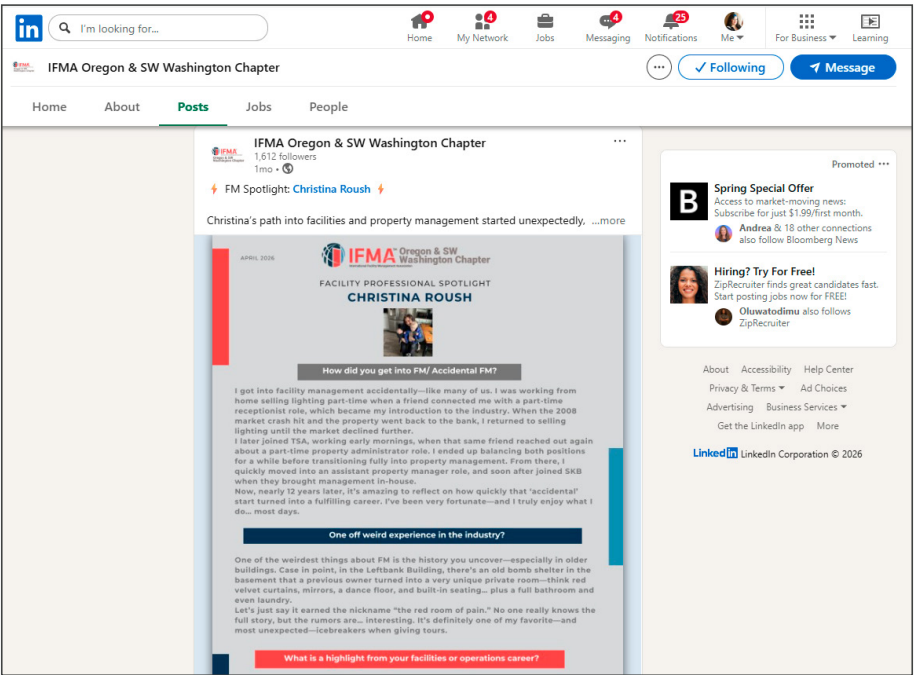
Supporting Marketing Channels and Tactics: While personal invitation leads our strategy, we employ complementary approaches:

Digital Channels:

- LinkedIn professional network outreach
- Email campaigns to warm prospects
- Social media membership drives



World FM Day at TopGolf



Linkedin Member Spotlight



EXPO 2026 Flier

As a new member to the Portland, OR IFMA chapter, I am delighted and grateful for the wonderfully welcoming experience I have received. The organizing and leadership team have already provided me with highly valuable resources for advancing my career through IFMA's professional development courses, as well as connecting me with the local FM community and their service provider rosters. I am thrilled to be part of the IFMA Portland network and excited to see the mutual benefits take shape.

Thomas SampleWood – Professional Member, Commercial Property Manager at CBRE

Strategic Partnership Outreach:

Vertical market booth presence at OSFMA (Oregon School Facilities Management Association), OSHE (Oregon Society for Healthcare Engineering), LOC (League of Oregon Cities), OASBO (Oregon Association of School Business Officials), AOC (Association of Oregon Counties), and NW Facilities Expo

Targeted Recruitment:

- Young Professionals initiative (currently 23 members, fastest growing segment at 35% year-over-year)
- Military outreach programs
- Student recruitment drives

These channels generate awareness and initial contact, but personal invitation remains the critical conversion catalyst.

Metrics: Quantified Growth and Quality

Membership Composition (Spring 2025):

- Total Members: 250 (chapter record)
- Growth Goal: 275 (10% increase)
- Professionals: 118
- Associates: 114
- Young Professionals: 23

Performance Indicators:

- **Conversion time:** As rapid as one week for personally invited prospects
- **Volunteer participation:** 3x higher among personally recruited members
- **Marketing cost per acquisition:** Near-zero for personal invitation vs. \$125+ for digital campaigns



IFMA OSWW Symposium

STRATEGIC PLAN ALIGNMENT

Chapter Strategic Pillar: Membership Growth & Engagement

Our strategic approach focuses first on creating meaningful value for our members and fostering a strong sense of community. Rather than emphasizing recruitment alone, we encourage current members to personally invite colleagues and peers who they believe will benefit from the connections, resources, and opportunities our chapter provides. This thoughtful, member-driven approach helps build authentic engagement, stronger relationships, and long-term participation.

The Membership Committee supports this effort through ongoing outreach, personal communication, and welcoming events (New Member Happy Hour and Coffee Connections) designed to help new members feel connected from the start. By creating opportunities for meaningful interactions and shared experiences, we cultivate a membership journey rooted in relationships, collaboration, and professional growth.

IFMA Global Priority of Building a Stronger FM Community:

Personal invitation executes the IFMA Global call for a connected, skilled FM community by building relationships before transactions. Peer-to-peer recruitment naturally clusters members by industry, geography, and career stage, strengthening local professional networks.

Our focus on FMP, SFP, and CFM credentials advances professionalism in the FM workspace. A stronger, more educated workforce serves facilities better and provides more efficiently managed and healthier spaces.

Cost-Effectiveness and Sustainability:

Reducing reliance on paid digital marketing while achieving record growth creates a sustainable, scalable model. **The near-zero marginal cost of personal invitation allows us to reinvest savings into member programming, creating a virtuous cycle: better member experience → more enthusiastic advocates → higher-quality invitations → stronger chapter.**

In summary: Personal, peer-to-peer invitation delivers superior conversion (40% vs. 2-5%), retention (90% vs. 60%), engagement (3x volunteer rate), and cost-effectiveness while directly advancing both chapter and global IFMA objectives.



NW Facilities Expo



IFMA OSWW Mugs



IFMA OSWW Mugs



Small Group Coffee Connect

3. What strategy does the chapter employ to retain its members? What feedback instrument is used to measure satisfaction? Describe in quantifiable terms how this strategy has strengthened the chapter. How is this strategy tied into the chapter's strategic plan?

Primary Retention Strategy

Our chapter's retention strategy centers on the *OSWW Buddy System, a structured pairing program that connects every new Facility Manager and Associate member with an experienced chapter member, preferably in the same geography for six months of intentional one-on-one mentorship and support.* This personalized approach ensures new members feel welcomed, informed, and connected from day one.

The Buddy System is strengthened through ongoing personal connections that help new members feel welcomed and engaged from the start. In addition to New Member Happy Hours and chapter events, we encourage one-on-one interactions, whether it's meeting for coffee, lunch, or simply taking time to connect and learn about a member's interests and goals. We actively encourage new members to get involved in committees, mentorship opportunities, and events that align with their professional interests. By building genuine relationships and creating meaningful opportunities for involvement, we help members develop lasting connections and become active participants in our chapter community.

Feedback Instrument

Our primary feedback instrument is the annual member satisfaction survey, deployed each Q4 with a consistent format aligned to IFMA's Balanced Scorecard. *In 2025, we achieved a 78% response rate.* The survey measures key indicators including sense of belonging, perceived value, event satisfaction, and likelihood to renew.

We supplement this with quarterly committee check-ins, post-event evaluations via social media engagement and direct feedback, and real-time member input during networking events. These secondary channels provide qualitative insights that inform program adjustments throughout the year.



IFMA buddy lunch with Denay and Mathew



IFMA OSWW Symposium

Quantifiable Strengthening

This retention strategy has measurably strengthened our chapter:

OVERALL CHAPTER GROWTH

Overall membership grew this year by 5.9%, sustained by consistent programming and active engagement.

COMMITTEE VOLUNTEER RETENTION

100% of committee volunteers remain active chapter volunteers, reflecting strong engagement and sustained participation.

PROGRAM PARTICIPATION RATE

Our diverse programming successfully connects 60% of members through annual participation.

MEMBERSHIP OUTREACH AND SUPPORT

We actively utilize IFMA Global resources to grow and support our membership. Each year, our chapter receives five complimentary memberships and scholarship opportunities, and 100% of these are awarded and utilized.

I joined IFMA to expand my facilities knowledge and intentionally connect with other professionals in the industry, and it has already exceeded my expectations. Since becoming a member, I've gained access to high-quality classes, webinars, and conferences that are actively helping me grow and move closer to my professional goals. The most valuable takeaway has been the opportunity to learn about a wide variety of facilities, understand the challenges they face, and hear firsthand how other professionals successfully overcome those challenges. So far, the KGW studio tour has been my favorite event—it was an incredible experience that combined behind-the-scenes insight with meaningful networking and learning opportunities.

Michael Hunter, CAMT, CPO - Facilities Operations Supervisor - Washington County, Oregon

Strategic Plan Alignment

This retention strategy directly operationalizes our strategic plan’s core pillars of Membership Engagement and Member Value Delivery. **Our strategic plan states: “Every new member must have a named connection within 30 days to foster belonging and accelerate integration.”** The Buddy System delivers this mandate systematically.

Furthermore, retention is tracked as a core **Balanced Scorecard metric** reviewed quarterly by the Executive Committee. The strategy ensures members understand IFMA’s operating model, expand their professional networks, and contribute meaningfully to shaping our chapter’s direction, all explicit goals within our strategic framework.

Our data reflects this alignment: **strong direct website traffic, consistent event attendance, and repeated member engagement demonstrate that our chapter serves as a central professional hub.** Through FM spotlights, leadership visibility, accessible resources, and layered value delivery, we’ve shifted from passive membership to active, ongoing involvement, directly supporting IFMA’s mission and our chapter’s vision for sustained member connection and growth.



New Member Happy Hour



PDX Fire Station Tour

4. How does the chapter contribute to the professional development of its members? Discuss the various monthly programs offered, additional seminars and chapter participation in encouraging members to obtain a credential. How is professional development strategy tied into the chapter’s strategic plan? What is the strategic theme?

PROFESSIONAL DEVELOPMENT STRATEGY

How OSWW Contributes to Professional Development

OSWW advances member professional development through three interconnected channels:

1

Monthly programs mapped to IFMA's 10 Domains

2

Signature seminars and events

3

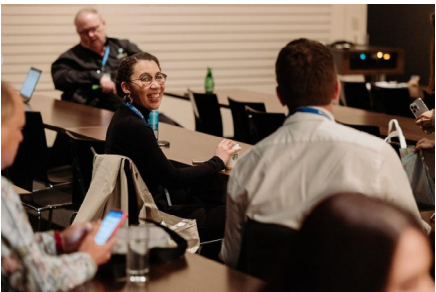
Comprehensive credential encouragement program including full reimbursement, recognition, & networking events

Our 2025–2026 theme “Learn • Lead • Credential”, operationalizes our strategic pillar of Professional Development & Credentialing Excellence.

Monthly Programs (September–June, 10 months)

OSWW delivers 10–12 monthly programs annually across five recurring formats:

- **Facility Tours** (4 - 6/year, avg. 58 attendees): Hands-on educational experiences at industry-leading facilities. Recent tours included:
 - Rivermark Community Credit Union Headquarters (48 attendees): Financial operations, workplace strategy, and operational excellence
 - Center for Addictions Triage and Treatment (CATT) (55 attendees): Healthcare facility design, DEI initiatives, risk management, and sustainability
 - Providence Park (93 attendees): LEED-certified stadium operations, hospitality management, and sustainability practices
 - Portland General Electric Integrated Operations Center (34 attendees): Mission-critical infrastructure, grid control, emergency response, and resilient building design
- **Women’s Connect** (quarterly, avg. 36 attendees): Sold-out sessions focused on professional growth, leadership development, and career navigation for women in FM. Topics have included negotiation skills, mentorship, and imposter syndrome.



IFMA OSWW Symposium

- **South Valley Events** (6/year, avg. 25 attendees): Regional programming in the Willamette Valley, alternating formats between educational tours, networking socials, and industry panels to serve our geographically dispersed membership.

The table below shows 17 professional development and networking events from the current year. Of these, 12 are recurring monthly/quarterly programs (tours, Women's Connect, New Member events), 2 are South Valley regional events, and 2 are signature social/networking events. All educational events are mapped to IFMA's 10 Domains.

EVENT NAME	EVENT DATE	ATTENDEE COUNT
1st Annual World FM Day at Top Golf	May 14, 2025	52
Providence Medical Center New Emergency Department Panel Presentation, Luncheon & Tour	May 22, 2025	39
South Valley Networking Event – Building Performance Standards	May 28, 2025	17
FM Women's Connect Group	June 4, 2025	44
Golf/Inauguration	July 18, 2025	163
Women's Connect	September 3, 2025	32
Rivermark Community Credit Union Tour	September 24, 2025	48
New Member IFMA 101	October 7, 2025	12
IFMA New Member Event	October 15, 2025	27
CATT Tour & Presentation	October 16, 2025	55
South Valley Wine Event	October 23, 2025	38
Providence Park Tour & Presentation	November 6, 2025	93
Holiday Party at the Oregon Zoo	December 10, 2025	122
South Valley Christmas Party	December 16, 2025	12
Women's Connect	January 7, 2026	40
PGE New Operations tour	January 15, 2026	34
South Valley Lunch & Learn	February 18, 2026	21
Terminal 1 Vancouver Tour	February 25, 2026	53
Women's Connect	March 2, 2026	50
Hillsboro Hops Baseball Park Tour & Presentation	March 19, 2026	124
New Member Happy Hour	April 1, 2026	19
Symposium	April 23, 2026	149
AVERAGE EVENT ATTENDANCE IS 57 PEOPLE PER EVENT		

Additional Seminars

Beyond monthly programs, OSWW offers two additional seminar formats annually:

- **Annual Symposium (20+ year tradition):** Full-day event featuring 5 - 6 expert-led sessions covering emerging trends, best practices, and strategic FM topics. Consistently attracts 100+ attendees and provides deep dive learning opportunities beyond monthly program formats.
- **Credentials Uncorked (launching 2026):** New credential-focused networking event at Amaterra Winery pairing credentialed members with candidates pursuing FMP, SFP, or CFM designations. This intimate setting provides mentorship, exam preparation insights, and career guidance.
- **Future Development:** We are collaborating with other IFMA chapters to develop virtual roundtable series for 2027, expanding access for remote members and creating cross-chapter learning opportunities.

Credential Encouragement

OSWW encourages FMP, SFP, and CFM attainment through:

- Full reimbursement for exam fees, books, and coursework upon completion (every request approved to date)
- Flexible workload management for Board members pursuing credentials, redistributing chapter duties to allow focus on studies
- Recognition at monthly events and on social media for new credential holders
- Five-year anniversary recognition program highlighting credential holders in their anniversary month at events and on social platforms
- Credentials Uncorked networking event (2026 launch) connecting credentialed members with candidates
- Scholarship application process requiring only a brief statement of intent, no barriers to access

Results

Our chapter credential holders grew from 52 to 55 individuals during the year:

FMP: 29 → 31 (+3)

SFP: 8 → 17 (+9)

CFM: 11 → 11 (maintained)

Multiple credential holders: 11→ 13 (+2)

Context: With 118 Professional members (the primary pool for FMP/CFM eligibility), our credential penetration among eligible members is approximately 26%. While net growth appears modest

Since becoming a member of IFMA and the Oregon/SW Washington Chapter, I've not only expanded my industry knowledge and grown my vendor network, but I've also developed professionally by serving on the local board and pursuing my FMP. IFMA offers boundless opportunities to learn, connect, and grow. Joining IFMA is truly a great first step toward advancing your career.

Andrea Hill - Workplace Services: Vice President - First Tech Federal Credit Union



Credential Scholarship Recipient – Andrea Hill



Credential Scholarship Recipient – Bobby LaRon

(+3 credentials), we prioritized depth, increasing multi-credential holders from 11 to 13. Our scholarship program launched this year; we expect accelerated growth of 15–20% in 2027 as awareness builds and our Credentials Uncorked event creates momentum.

CEU Support: While OSWW does not currently issue CEUs directly, all educational programs are designed to align with IFMA’s 10 Domains, and members receive documentation to self-report for CFM recertification. All programs qualify for credential maintenance points. We are exploring CEU co-sponsorship with a credentialed provider for 2027.

Strategic Plan Alignment

Our 2025–2026 strategic plan states: “Priority 4: Professional Development & Credentialing Excellence. Increase credential attainment by 15% year-over-year and deliver 10+ monthly programs annually mapped to IFMA’s 10 Domains.”

Both metrics are on track:

CREDENTIAL GROWTH: +3 credentials (6% growth, progressing toward 15% annual target with new initiatives)

PROGRAM DELIVERY: 12 professional development events delivered (exceeding 10+ target)

Performance is reviewed quarterly via our Balanced Scorecard, with program attendance, credential counts, and member satisfaction scores tracked as key performance indicators. This strategy directly supports IFMA Global Education & Knowledge mission and positions OSWW members as industry leaders through continuous learning and professional advancement.



IFMA OSWW Symposium

5. How has the chapter worked with local colleges, universities or institutes and other organizations to advance the facility management profession? Does the chapter offer support to the IFMA Foundation?

Academic and Organizational Partnerships & IFMA Foundation Support

OSWW is building a structured FM workforce pipeline through strategic partnerships:

- **Portland Community College (PCC):** OSWW initiated a partnership with PCC to develop an associate degree in Facility Management, designed to feed into Portland State University’s bachelor’s and master’s programs. We have engaged the IFMA Foundation as a collaborative partner in this effort. To validate workforce demand, OSWW secured commitments from three major regional employers (Intel, Legacy Health, Portland General Electric) who have expressed interest in hiring program graduates. The curriculum development committee was formed in late 2025, with target launch anticipated for Fall 2027.
- **Trade Union Engagement:** In 2025, OSWW initiated outreach to local trade unions, including IBEW Local 48 and UA Local 290, to demonstrate FM career pathways for skilled tradespeople. We hosted an informational roundtable attended by 15 union members to introduce FM as a professional advancement opportunity.
- **Future Plans:** Planned initiatives for 2026–2027 include FM career presentations in PCC classrooms (Spring 2026), development of paid internship programs with partner employers (minimum 5 positions annually starting Fall 2027), and an annual FM career fair co-hosted with PCC.

IFMA Foundation Support

OSWW consistently supports the IFMA Foundation’s mission through financial contributions, scholarships, innovative fundraising, and leadership:

Financial Contributions: OSWW contributed \$3,500 to the IFMA Foundation in FY 2025 and \$2,500 to date in FY 2026, totaling \$6,000 over 24 months.

Scholarships: OSWW has awarded 5 scholarships over the past 4 years. We are committed to sponsoring 2 additional scholarships to be awarded at World Workplace 2026.

QR-Code Giving Program: Our Immediate Past President, who serves on the IFMA Foundation Board of Trustees, spearheaded an innovative QR-code giving program will soon be deployed across all IFMA components. This program features incentive tiers including event recognition (\$50+), complimentary event registration (\$250+), and featured member spotlights (\$500+). In its first year of implementation, the program has driven measurable engagement and provided a replicable fundraising model for the broader IFMA community.

OSWW CONTRIBUTED:

\$3,500 to the IFMA Foundation in FY 2025

\$2,500 to date in FY 2026

TOTALING \$6,000

over 24 months



As a graduate of a Facilities Management program, I joined IFMA to connect with industry professionals who could deepen my network, share real-world insights, and support my continued growth in the field. In the coming weeks, I'll complete my FMP certification, which has reinforced the concepts I learned in the classroom and allowed me to see those concepts come to life in my day-to-day operations work. I've also had the opportunity to collaborate with several vendors whose expertise has helped me deliver greater value to my clients.

Jackson Aldous - Professional Member, Director of Facilities Operations, Sodexo

Board Representation: OSWW's Immediate Past President serves on the IFMA Foundation Board of Trustees, providing direct insight into Foundation priorities and ensuring OSWW's initiatives align with global workforce development goals.

Strategic Plan Alignment

These efforts directly support OSWW's strategic pillar of "Workforce Pipeline Development," measured quarterly through the number of academic partnerships established and Foundation dollars raised. Our initiatives align with the IFMA Foundation's global workforce development priorities and demonstrate our commitment to advancing the FM profession at local, regional, and international levels.



IFMA OSWW EC with Scholarship Student

Scholarship Student on WW Stage



6. Discuss chapter communications. How is important information disseminated to members? Include information about the newsletter, public relations, website, etc. How is this strategy tied into the chapter's strategic plan?

Communications Strategy

The OSWW Chapter communicates with members through four primary channels, measured monthly for effectiveness and aligned to strategic goals.

Primary Communication Channels & Cadence

Newsletter	Website	LinkedIn	Targeted Email Campaigns
Twice-weekly distribution (Tuesday/Thursday, 42 issues annually) reaches 450 subscribers. Each issue includes upcoming events (next 30 days), recent event recaps with photos, volunteer spotlights, rotating sponsor recognition, IFMA Global news summary, and 2-3 job postings. Thursday issues feature "Member Milestones" celebrating credentials, work anniversaries, and new roles.	Serves as the central hub featuring an event calendar, job board, member directory, and Industry Partners Directory.	The chapter's primary social media platform. Content focuses on event promotion, member recognition, volunteer spotlights, and amplification of IFMA Global messaging.	Strategic sequences support member lifecycle touchpoints including new member onboarding, lapsed member re-engagement campaigns, and event-specific reminders. Post-event communications include attendee thank-you messages and event recap highlights.
Metrics (2025): Average open rate 48% (industry benchmark: 25%), click-through rate 12%, highest engagement on event announcements (62% open rate).	Metrics (2025): 4,200 unique visitors, 8,500 page views. Top pages: Events (32% of traffic), Job Board (28%), Industry Partners Directory (18%).	Metrics (2025): 1,200 followers (+22% year-over-year growth), average post reach 1,800, engagement rate 6%.	Metrics (2025): 6-email welcome series, 100% open rate, 15% conversion to event attendance

Public Relations Efforts

OSWW's public relations strategy raises awareness of facility management excellence and strengthens the chapter's reputation across Oregon and Southwest Washington. Communications maintain clear, consistent messaging that positions the chapter as a reliable resource for professional learning and industry connection.

2025 Activities: The chapter issued three press releases (Annual Symposium, scholarship announcement, new board installation). The Chapter President co-authored an article for Facility Management Journal ("Sustainability Practices in the Pacific Northwest," Q3 2025). Public relations coordination is managed by the Marketing Committee, with formal media outreach identified as a growth area for 2027.

I joined IFMA to better understand how the spaces we design truly function long after construction is complete. As an interior designer, I wanted deeper insight into facilities operations, maintenance, and real-world performance so I could be a more informed and effective partner to my clients. Professionally, IFMA has expanded my perspective beyond design intent, strengthening my ability to align sustainability, functionality, and long-term value in real estate decisions. The most rewarding part of my membership has been giving back through active engagement with the local chapter—sharing a design perspective while learning directly from facility managers who steward these buildings every day.

Bethanne Mikkelsen -
NCIDQ, LEED AP – ANKROM
MOISAN

Key Differentiators

- **Twice-Weekly Cadence:** Unlike most chapters that communicate weekly or biweekly, OSWW’s twice-weekly newsletter enables real-time event promotion and fresh job postings that keep members current on opportunities.
- **Industry Partners Directory:** This searchable database of Associate Members organized by service category is a unique member resource not commonly offered by peer chapters. The directory increases visibility for associate members while reinforcing IFMA’s role in connecting facility management professionals with trusted industry resources.
- **Integrated In-Person Recognition:** Beginning in 2026, the chapter introduced printed banners and posters highlighting Sustaining Sponsors at all chapter events and educational programs. This tactile communications approach increases sponsor visibility while reinforcing the partnerships that strengthen the facility management community.

Effectiveness Measurement & Feedback

The chapter monitors communications effectiveness through multiple instruments:

- **Monthly email analytics review:** Open rates, click-through rates, unsubscribe rates
- **Biweekly LinkedIn analytics review:** Follower growth, post reach, engagement rates
- **Quarterly website analytics review:** Unique visitors, page views, top content, traffic sources
- **Annual member survey:** Includes three communications-specific questions; 2025 results showed 88% of respondents “satisfied” or “very satisfied” with chapter communications (78% survey response rate)
- **Post-event feedback forms:** Launched 2025 to understand member experience and inform future programming

Direct Impact on Member Retention & Engagement

Communications strategy directly supports retention objectives:

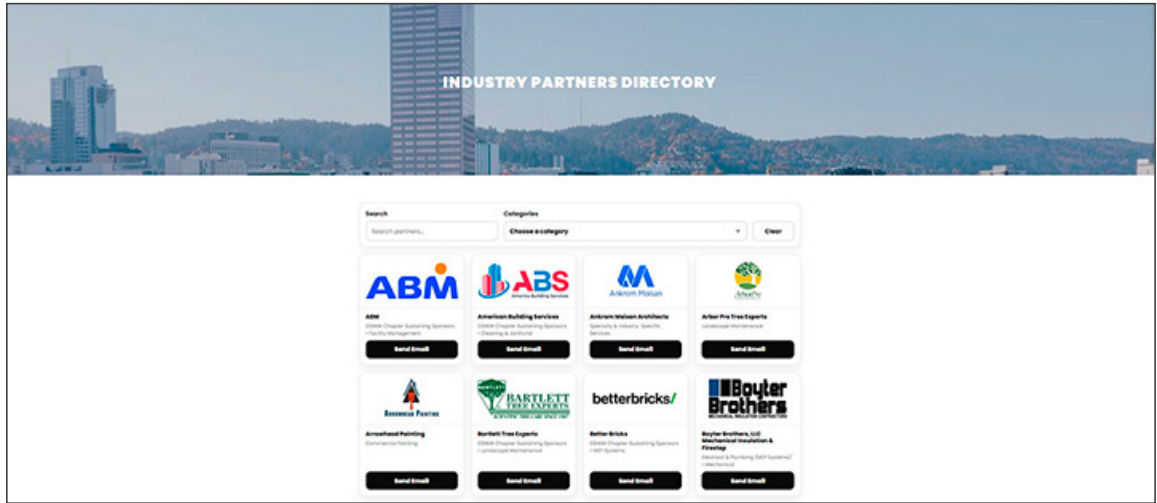
- New member welcome sequence achieves 100% open rate and accelerates integration
- Lapsed member campaigns (targeting 60+ days without engagement) convert 15% to event attendance
- Event recap communications drive future attendance through social proof, post-event newsletter opens average 55%
- Member Milestones recognition strengthens community connection and celebrates professional achievements

Strategic Plan Alignment

Our 2025-2026 Strategic Plan explicitly addresses communications effectiveness:

- Objective 5.1: Increase newsletter open rate to 50% by Q4 2026. Current performance: 48% (on track).
- Objective 5.2: Grow LinkedIn following to 1,500 by Q4 2026. Current performance: 1,200 followers, representing +22% year-over-year growth (on track).

Both objectives are reviewed quarterly by the Marketing Committee. Communications strategy supports three strategic pillars: enhancing member experience through timely, relevant information; strengthening chapter brand through consistent, professional messaging; and amplifying IFMA Global visibility within the Pacific Northwest facility management community.



Partner Directory



Programming Tour Flyer



Blood Drive Flyer

7. Discuss the chapter's financial strategy. How are funds raised and how is revenue spent? Are donations made to the IFMA Foundation or scholarship funds? How does the chapter focus its charitable giving so that it meets their mission and advances the facility management profession? Are sponsorships accepted and how are they utilized? How is this strategy tied into the chapter's strategic plan?



End of Year Awards

Financial Strategy

Our chapter's financial strategy is established during our annual board retreat. Our current Treasurer, a financial services professional and member of the Banking and Credit Union Council, ensures that our approach is both fiscally responsible and aligned with our mission.

How Funds Are Raised

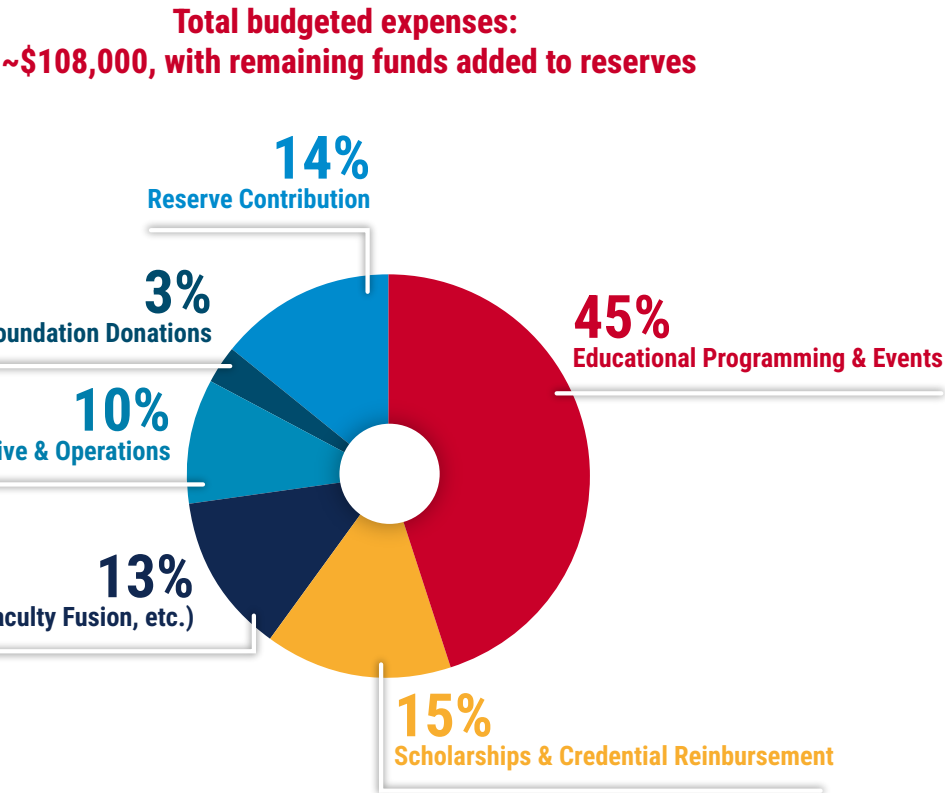
OSWW revenue comes from four primary sources:

- Sponsorships: \$80,000+ YTD (approximately 67% of total revenue)
- Event registration fees: \$18,000 (15%)
- Symposium: \$10,000 (8%)
- Neil Moodhe Memorial Golf Tournament (net): \$4,200 (3%)
- Other sources: \$8,000 (7%)

Total projected 2025 revenue: ~\$120,000

How Revenue Is Spent

2025 budgeted expenses reflect our commitment to member development and mission advancement:



IFMA Foundation Donations

OSWW has contributed \$15,492.48 to the IFMA Foundation over the past 5 years, including \$2,500 in the current year. Our Immediate Past President serves on the Foundation Board of Trustees, strengthening our connection to IFMA's global workforce development mission.

Scholarship Donations

OSWW has awarded 27 scholarships totaling \$24,000 over the past 5 years (average award: \$890). These scholarships support:

- Credential exam fees (FMP, SFP, CFM)
- Study materials and prep courses
- World Workplace attendance for students and emerging professionals
- The Neil Moodhe Memorial Golf Tournament has been a cornerstone of our scholarship fundraising. Over the past several years, this annual event has generated approximately \$18,500 for scholarships, with the 2025 tournament alone raising \$4,200 net—funding 3 full scholarships for IFMA credentials.

How Charitable Giving Meets Our Mission

Our mission: "To advance the facility management profession in Oregon and Southwest Washington through education, networking, and credentialing."

Our charitable giving directly operationalizes this mission:

- IFMA Foundation donations support global workforce development and research
- Scholarships remove financial barriers to credentials, enabling members to advance professionally
- Student sponsorships build the future FM pipeline by exposing emerging talent to industry leaders and best practices
- Every dollar donated advances the profession and strengthens our community.

Sponsorships: Acceptance & Utilization

Sponsorships are critical to our success and are accepted at multiple levels. Our most impactful innovation is the FM Sponsorship level, which allows free event admission for FM professional members, eliminating financial barriers while delivering sponsor visibility.

Our Sustaining Sponsorship Program provides recurring annual funding, creating predictable revenue streams that support long-term planning.

Sponsorship performance metrics:

- \$80,000+ raised YTD (2025)
- 85% retention rate year-over-year (2024 to 2025)
- 92% sponsor satisfaction ("likely to renew") based on our annual survey
- Sponsorship dollars offset event costs, enhance programming quality, and ensure accessibility for all members.

I joined IFMA because I already knew several people involved and was drawn to the strong sense of community within the chapter and some of its unique offerings. I love that IFMA offers hands-on opportunities like facility tours across the Portland metro, along with thoughtful programming that supports professional growth and creates space for women in the industry. Through my membership, I've already gained meaningful connections, exposure to different facilities and best practices, and access to educational sessions that help me better serve my clients and partners. What I value most is the opportunity to stay engaged, support fellow members, and contribute to a collaborative community that elevates the facilities profession across our region.

Tracy Kuehl - Business Development Manager - 1-800-PLUMBER + AIR



World FM Day Flyer



End of Year Award Recipients



Golf Tournament at Langdon Farms

Financial Oversight & Transparency

Our Treasurer presents monthly financial reports at every board meeting, including actual vs. budget comparisons and year-to-date variance analysis. An independent finance review is conducted annually by a CPA member (pro bono).

Reserves policy: OSWW is working toward reserves target of 18 months of operating expenses, approximately \$225,000 based on our current burn rate of \$12,000/month. Current reserves: ~\$192,000, reflecting strong fiscal discipline. Once we reach our target, excess funds will support expanded member benefits, including additional World Workplace and Facility Fusion attendance, enhanced scholarship offerings, and elevated member events.

YTD performance (2025): Revenue 102% of budget, expenses 95% of budget.

Strategic Plan Alignment

Our financial strategy is directly tied to our strategic plan:

- Objective 6.1: Maintain sponsorship retention above 80%. Current: 85% ✓
- Objective 6.2: Grow IFMA Foundation contributions 10% annually. Met (2024: \$2,273 → 2025: \$2,500 = +10%) ✓
- Objective 6.3: Award 5+ scholarships annually. On track (6 awarded YTD) ✓

All financial metrics are reviewed quarterly via our Balanced Scorecard, ensuring continuous alignment with strategic priorities.

In summary: Every dollar raised and spent reflects our commitment to advancing the facility management profession and building a strong, sustainable future for our members. Our financial strategy is fiscally responsible, mission-driven, and strategically aligned, ensuring OSWW remains a leading chapter for years to come.

8. How does your chapter recognize chapter volunteers? Does the chapter have an annual awards program? If yes, what awards do you give?

VOLUNTEER RECOGNITION STRATEGY

Annual Awards Program

OSWW's cornerstone recognition event is the Annual Awards Event, held each June with 65-80 attendees including board members, committee volunteers, sponsors, and Past Presidents. The President selects award categories annually based on that year's contributions and strategic priorities, with final selections approved by the Executive Committee.

Our Annual Awards Event includes the following awards:

- Advocacy Award
- Associate Member of the Year
- Association Partner of the Year
- Back in the Saddle
- Board Member of the Year
- Chapter Impact Award
- Comin' in Hot
- Community Impact Award
- Distinguished Sustaining Sponsor of the Year
- Emerging Leader Award
- Honorary Emeritus Member
- IFMA Champion Award
- Leadership Excellence Award
- Lifetime Achievement Award
- President's Award of Excellence
- Professional Member of the Year
- Volunteer of the Year

Nomination & Selection Process: Award nominations are solicited annually from all committee chairs and board members. The Executive Committee reviews nominations and selects winners by majority vote based on hours volunteered, impact on chapter goals, and leadership demonstrated. No self-nominations are accepted. Each winner receives an engraved plaque and recognition in the chapter's twice-weekly newsletter (reaching 450 subscribers) and on LinkedIn (averaging 1,200+ impressions).

Other Volunteer Recognition (Beyond Annual Awards)

FM Spotlights: We feature a "FM Spotlight" on our LinkedIn page highlighting individual member's stories and celebrating their achievements with our entire membership community.

Years of Service Recognition: Members are recognized for milestone anniversaries, 5 years, 10 years, 15 years, and beyond, with custom magnetic pins that can be worn on professional attire, symbolizing their sustained commitment to OSWW and IFMA.

Volunteer Appreciation Luncheon: Held during National Volunteer Week (April 19-25), this dedicated event focuses on fun, camaraderie, and team building with 35-45 attendees. The chapter funds all food and venue costs as a direct expression of thanks for the countless hours our most active volunteers commit to running initiatives, programs, and events.



Board Retreat Dinner



Years of Service Pins

Last summer, I was fortunate to be invited to World Workplace in Minneapolis with our board of directors. It was an incredible experience. I've never had the opportunity to attend anything like this professionally in the past, and it truly was eye-opening. From the guest speakers to the networking and collaborating, and all the way to the trade show floor, it was just a perfect experience.

Michael Ruchti - Facilities Manager - KGW • A TEGNA COMPANY

Sponsor Thank-You Dinner: An intimate event (approximately 25 attendees) recognizing the vital financial and in-kind support from our corporate sponsors. This setting allows leadership to personally express gratitude and discuss the tangible impact sponsor contributions have had on chapter programs throughout the year.

Past Presidents Recognition: Past Presidents receive complimentary attendance at the Annual Symposium and Golf Tournament as ongoing recognition of their service and continued contribution to chapter leadership.

Outgoing Board Members: Receive a certificate of appreciation and gift at the June meeting, honoring their dedicated service during their board tenure.

Presidential Thank-You Notes: The President sends handwritten thank-you notes quarterly to active volunteers, providing personal recognition for their ongoing contributions.

2025 Recognition Metrics:

ANNUAL AWARDS EVENT: 65 attendees, 17 award categories recognizing individual and team excellence

VOLUNTEER APPRECIATION LUNCHEON: 38 attendees

SPONSOR THANK-YOU DINNER: 25 sponsor representatives attended

VOLUNTEER SATISFACTION WITH RECOGNITION (2025 ANNUAL SURVEY): 91% “satisfied” or “very satisfied”

VOLUNTEER RETENTION RATE (YEAR-OVER-YEAR): 78% among recognized volunteers vs. 55% among non-recognized volunteers

ACTIVE COMMITTEE MEMBERS: 35

VOLUNTEER HOURS CONTRIBUTED: 840 hrs/yr

Strategic Plan Alignment

Volunteer recognition directly supports our strategic pillar of “Building a Strong Volunteer Culture” and IFMA Global priorities of Member Engagement and Leadership Development. Recognition metrics are reviewed quarterly by the Executive Committee to ensure our programs remain effective and aligned with member needs. By celebrating volunteerism as the cornerstone of IFMA, we inspire continued engagement and cultivate future leaders who drive the chapter and the broader association forward.

9. How has the chapter tied its strategic plan to IFMA’s strategic plan? What efforts are made for chapter-wide buy-in of the strategic plan?

Direct Alignment with IFMA Global Strategic Priorities

OSWW’s strategic plan is explicitly mapped to IFMA Global four focus areas as defined in the Chapter Alignment Framework: Community, Education, Advocacy, and Innovation. Below is our direct alignment with measurable outcomes:

IFMA Global Priority	OSWW Strategic Initiative	OSWW Metric
COMMUNITY: Build and strengthen member connections	Regular networking events; monthly facility tours; FM Women’s Connect (4 sold-out events, 40–50 attendees each)	513 total event attendance 92% satisfaction rate 82%-member retention
EDUCATION: Increase credential attainment and professional development	Full reimbursement for FMP/SFP/CFM; credential study groups; Credentials Uncorked event; educational scholarships; IFMA Foundation support	32 FMP, 17 SFP, 11 CFM holders; +3 year-over-year credential growth
ADVOCACY: Promote FM profession and legislative awareness	Legislative updates and compliance education at events; subject matter expert presentations on regulations relevant to facility management	70% of events include advocacy-related content; consistent legislative briefings
INNOVATION: Advance new technologies and sustainable practices	Feature emerging technologies and sustainable practices at events and in communications; board member on IFMA Sustainability Board; SFP credential support	17 SFP holders; sustainability content at 70% of events; innovation showcased at national events

Verbatim Alignment Examples:

IFMA Global Focus: “Strengthen member engagement and community building across all components.”

OSWW Strategic Plan: “Drive member engagement through twice-weekly newsletters, monthly site tours, and specialty networking events targeting underrepresented FM segments.”

Result: 48% email open rate; 513 total event attendance.

IFMA Global Focus: “Increase the number of credentialed professionals to elevate the FM profession.”

OSWW Strategic Plan: “Grow FMP/SFP/CFM credential holders through full reimbursement programs, facilitated study groups, and annual Credentials Uncorked celebration event.”

Result: 60 total credential holders; +5 year-over-year growth.

Being a member of IFMA has been an invaluable investment in my career and personal development. It helped me get my first job in the facilities field. It has helped connect me with some great people, some of which became customers or strategic partners. It helped give me leadership opportunities, from leadership positions on committees to being a member of a board. This organization has given me more than I would have ever expected an organization to give to its members. I am grateful to IFMA for all that it has helped me accomplish.

Stratton Turpen – Associate member, Township Building Services

Chapter-Wide Buy-In of Strategic Plan

OSWW ensures every member and volunteer understands and owns the strategic plan through multiple mechanisms:

- **Strategic Plan Development & Input:** The strategic plan is developed annually at a board retreat with input from all committee chairs and their respective committees. Draft goals are shared with the full membership for a two-week comment period before final board approval. This open process increases ownership and buy-in across the chapter.
- **Ongoing Communication & Reinforcement:** Annual Board Retreat: 100% board attendance; post-retreat survey shows 90% of attendees report they “clearly understand strategic priorities”
- **Strategic Plan One-Pager:** Distributed digitally and printed at all chapter events for member reference
- **Committee Charters:** Each of our six committees includes 2-3 strategic goals with quarterly metrics tracked in our Balanced Scorecard
- **New Member Onboarding:** 15-minute strategic plan overview included in IFMA 101 virtual meetings for all new members
- **Twice-Weekly Newsletter:** Strategic updates and progress reports delivered to full membership (48% average open rate)
- **Quarterly ‘State of the Chapter’ Presentations:** Open to all members with strategic progress updates (25-35 attendees average)
- **Annual Member Survey:** Includes “I understand the chapter’s strategic priorities” 2025 result: 82% agree (up from 71% in 2024)

Measurement & Accountability

OSWW uses a Balanced Scorecard approach tracking 12 metrics across four perspectives: Member Engagement (retention, attendance), Professional Development (credentials earned, event satisfaction), Financial Sustainability (sponsorship retention, reserves ratio), and Organizational Capacity (volunteer retention, leadership pipeline).

The Scorecard is reviewed at every board meeting and shared with all committee chairs to ensure accountability and transparency. Strategic progress is reported to the full membership quarterly through State of the Chapter presentations and our regular communications.

Key Performance Metrics

- **Completion rate of strategic objectives:** Tracked monthly via Balanced Scorecard
- **Committee performance:** Each committee reports quarterly on strategic goal progress
- **Member awareness measures:** Email open rates (48%), social media engagement (likes, reposts, shares), event attendance (513 total)
- **Scorecard performance results:** 82% member retention; 85% sponsorship retention; +15% event attendance year-over-year

Evidence of Effectiveness

This structured alignment and buy-in approach has produced measurable results that demonstrate the effectiveness of our strategic plan:

- MEMBER RETENTION: 82% (compared to regional average of 74%)
- EVENT ATTENDANCE: Up 15% year-over-year
- SPONSORSHIP RETENTION: 85%
- CREDENTIAL GROWTH: +3 year-over-year
- MEMBER UNDERSTANDING OF STRATEGIC PRIORITIES: 82% (up 11% year-over-year)

Our commitment to strict adherence to IFMA Global strategic framework, combined with transparent communication and member involvement in plan development, has created strong chapter-wide ownership and delivered consistent, measurable progress toward shared objectives.



IFMA SoCal Chapter Leadership Retreat



Facilities Fusion 2026



IFMA OSWW Symposium

**BALANCED
SCORECARD**

- Grow and Maintain Membership
- Educate Members
- Engage FM's
- Provide Value to FM's and Associates

- Met target by end of fiscal year
- Off-Track, plan exists to get on-track to meet target by end of Fiscal year
- Off-Track, action is required or target will not be met

Strategic Objectives		KPI's	Targets FY 2025-6	Initiatives	Current Status (green, yellow, red)
Financial Perspective	INCREASE MEMBERSHIP REVENUE	September 22, 1102141:12:00	275 Members	Partnering with other associations (OSFMA, OSHE, WAMOA)	
	INCREASE AND BROADEN SPONSORSHIPS	July 1 2025: 1 Platinum, 14 Gold, 5 Silver, 4 Bronze, 1 FM Sponsor	3 Platinum Sponsorships, 15 Gold Sponsorships, 8 Silver, 5 Bronze	Outreach to Sponsors ahead of renewal, Annual Sponsorship Appreciation Dinner, Focus on other vendor specialists, Filling gaps of Service for FM's, Early renewal incentives	
Stakeholder Value	INCREASE FM ATTENDANCE AT EVENTS	July 1, 2025 36%	Increase # of FM's at events by 10% from 36% to 46%	Round tables (FM Only), Free attendance to Programs covered by Sponsorship Tier, Women in FM Committee	
	INCREASE CREDENTIALIED AND CERTIFIED MEMBERS	July 1, 2025: FMP - 29, SFP - 8, CFM - 15, FMP/SFP - 5, FMP/CFM - 4, SFP/CFM - 1, FMP/SFP/CFM - 1	Increase credentialed members by 10%	FM inperson, SFP by world fm Day, and schoalrships	
	IMPROVE VISABILITY of ASSOCIATES TO FM's ON WEBSITE	Target date October 1st	Publish Vendor Directory	Chapter members/sponsors on a Vendor directory on our website. Contact information, Simple categories.	
Internal Perspective	IMPROVE VALUE OF INFORMATION TO MEMBERS	Monthly Review of the website, Analyze website traffic	Increase website traffic by 10%	Updating the website, provide Vendor directory, Offer FM Roundtables	
	ENHANCE COMMITTEE VOLUNTEERS	Verify with committees at board meetings on volutneer levels	8 New Committee members for the chapter	Invite new members to join committees, New committee members get a job immediatley. Update bylaws for clairty and reorganization. Job Descriptions for each committee. Monthly Committee meetings	
Organization Capacity	GET PROFESSIONAL DEVELOPMENT & Women's Connect FULLY OPERATIONAL	Monthly review at board meetings	4 WC meetings (quarterly) 8 Virtual Roundtables	Women's Connect Host Kick off and survey, quarterly meetings. Virtual FM roundtables focused on the capabilities	
	SUBMIT APPLICATION FOR CHAPTER OF THE YEAR AWARD	Our chapter has been improving in many areas, growth, leadership, events, chapter strategy. This has spured us to take the step to apply	We will have targeted initiatives to grow the chapter, the number of credentialed members, our presence in the community, more focussed educational events. We will present a professional looking presentation with the award application	Initiatives are listed in above areas	



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