



CREW-DC

**Strategic Plan
For the 3- to 5-Year Horizon, 2013+**

Developed in December 2012

In Collaboration with the
Board of Directors and Executive Committee

CREW-DC

Three- to Five-Year High Level Strategic Plan (for 2013+)

-- For Internal Use --

I. Background

During November and December 2012, the full Board of Directors and members of the Executive Committee of CREW-DC and several members who formerly held positions of leadership were all invited to contribute to a strategic planning process. This inclusive process included a series of three focus groups, an online survey to help prioritize CREW activities and investments, and a December Board meeting to confirm and refine priorities and begin action planning.

The aim of the strategic planning exercise was to replace CREW-DC's outdated strategic plan of several years ago with an updated plan that more accurately reflects the current size, composition, and resources of CREW-DC and the professional and economic environment in which members work and interact. Most importantly, leadership needed clear priorities about what areas and activities in which to invest time and resources most heavily and clear criteria for making trade-offs that would de-prioritize the preferences and priorities of certain members as well as less popular events.

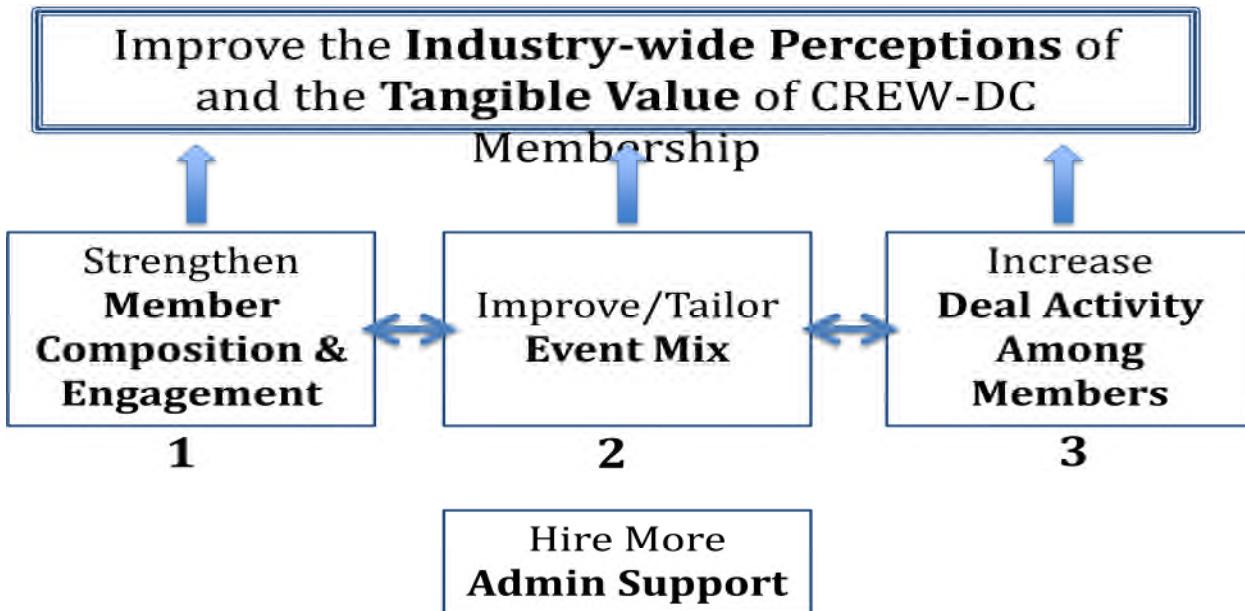
This plan summarizes CREW-DC's agreed upon strategic priorities for the 3 to 5-year time horizon and is intended to serve as an ongoing "living" resource to guide Board and Committee leadership in setting annual priorities and allocating effort and resources, beginning with 2013.

II. Executive Summary

At the December 4, 2012 Board meeting, CREW-DC leadership confirmed four strategic focus areas as their planning guide for committees. As the following graphic suggests, the over-arching goal of the new Strategic Plan is two-pronged:

- Improve perceptions of CREW-DC throughout the industry, and
- Strengthen the tangible value of membership, as experienced by a diverse membership base.

This central strategic goal embodies the vast majority of the feedback that was collected. It is supported by three complementary and interdependent areas of focus, and a fourth more tactical initiative that enables the others.



III. Key Assumptions

This high level plan is intended to provide **directional guidance only**. Specific decisions around events, programming, resource use and all aspects of operations need to continue to be made by the appropriate leadership. In order for those decisions (small and large) to generally align with the new plan, this document **should be used by committee leadership and the Board as a filter for vetting ideas and making trade-offs among options**. Unanimous support on every decision cannot be expected, but once made, a decision should be supported by all leadership.

The Board and committees should **identify the small number of easily trackable metrics** that they intend to use to periodically assess progress against these strategic priorities. No one measure is sufficiently reflective of progress in a whole focus area, so it is reasonable to have 2 to 4 measures for each area – some may be more qualitative than quantitative, but they should all be specific and clearly defined and communicated with the full membership.

Although this plan is **designed to provide multi-year guidance** to CREW-DC, the leadership should review and **reconfirm at least once per year** that these remain the right priorities in light of changes in membership composition, the professional and economic environment and member feedback.

The purpose of strategic focus is to excel in the most important areas and not spread effort across an unmanageable number of disparate objectives. Leadership should **be diligent about not initiating too many activities**. Even if they all align with the strategic priorities, an overly ambitious agenda and calendar would likely lead to volunteer burn out and disengagement, and low attendance rates at events. One tactic that will help avoid this is close coordination across committee chairs.

When experimenting with a substantive change in member services or a new type of event, it is best to **pilot new approaches** as a learning experiment before full-scale roll out and commitment.

IV. Strategic Plan Components (Focus Areas)

As outlined below, the components of the plan offer multiple ways to support the overarching pair of goals. The overlap across components make for a stronger plan, with less reliance on any one initiative. CREW-DC plans to have multiple committees collaborate on each of the three main components below. Additional implementation details for each component can be found in the *CREWDC Board Meeting Notes on Strategic Planning*, Dec. 4, 2012 (prepared by Hilary Joel, WJ Consulting).

a. **Strengthen Member Composition & Engagement.** This goal addresses several survey issues that ranked very high:

- i. Attract/engage “heavy hitters,”
- ii. Attract/engage “rising stars,”
- iii. Encourage more mentoring, and
- iv. Re-evaluate composition and growth/recruitment criteria.

Implementation Tactics (an initial sampling):

- Re-engage past presidents with meaningful roles as hosts, speakers, event organizers
- Attract more brokers and developers
- Hold more Advisory Board meetings and overlap 1x/year with Board
- Capture and analyze more details about members’ professional roles and sub-specialties, to better understand and manage composition
- Monitor and manage the percentage of members that serve on committees
- Strategically build in “table Introductions” time at smaller events

b. **Increase the interaction/visibility with the commercial real estate industry.**

Implementation Tactics (an initial sampling):

- Use Community Action charitable giving funds to buy tables at charity events that are heavily attended by members of the real estate community to give visibility to CREW and networking opportunities.
- Increase budget for annual Awards event to highlight visibility within the industry.
- Consider changing the annual golf event to be a competitive golf event suitable for more experienced golfers.

c. **Improve/Tailor Event Mix.** This goal addresses many top priorities from the survey findings:

- i. Attract/Retain/Engage/Use “heavy hitters”,
- ii. Increase interaction/visibility with whole industry,
- iii. Reduce number of luncheons and add smaller events,
- iv. Have more small members-only events and benefits,

- v. Offer diverse programming to meet diverse needs/interests, especially senior women, and
- vi. Encourage more mentoring.

Implementation Tactics (an initial sampling):

- Reduce pre-planned lunches to a total of 6, plus a joint program with another industry organization, such as DCBIA.
- Relevant committee heads and Board leadership construct a Master Calendar at the start of the year, building on the 7 lunch events, the March and May golf events, and October awards.
- Decide what new event types to experiment with – e.g., member-only events that target a specific sub-population, co-sponsored events, morning and post-work events, events planned by two committees working together, lunches with higher profile speakers and more aggressive marketing.

d. **Increase Deal Activity Among Members.** The top surveyed priorities addressed by this goal include:

- i. Attract/Retain/Engage/Use “heavy hitters,”
- ii. Encourage, acknowledge & increase business among members,
- iii. Increase interaction/visibility with whole industry, and
- iv. Have more members-only events and benefits.

Implementation tactics for this priority need to be further developed. The adjustments to event mix, additional engagement of “heavy hitters” and more interaction with Advisory Board members will contribute to member-to-member collaboration and networking that can lead to deal flow. More proactive recognition of all types of member business collaboration will also help.

e. **Consider Hiring More Admin Support.** This goal is a tactical enabler for the first three focus areas. The administrative work, member data analysis and event management and communications that the new initiatives involve would put an additional burden on a volunteer leadership team that is already working hard and very busy. CREW-DC has financial resources that it did not have several years ago, which makes this a feasible option with a compelling cost/benefit analysis. The specific cost and type of manpower to hire is to be determined after more information is gathered about the time commitment involved, the skill set desired and market rates on appropriate employees or consultants. This goal needs to be balanced with the goal of making sure that committee members have a meaningful role and feel that their volunteer efforts are appreciated. Therefore, we need to be careful not to allocate too many tasks to any administrative persons.

f. **Consider Updating/Revising Sponsorship Categories.** This goal also is a tactical enabler for the first three focus areas, as well as supporting the goal of membership recruitment and engagement. Because Sponsorship is the Chapter’s main source of funding, CREW-DC should consider updating and refining the sponsorship categories to maximize fundraising. In addition, Sponsorship is a source of engaging

senior members of the real estate industry because sponsors are entitled to free admissions to luncheons and other events (depending upon the sponsorship levels).

V. Implementation Considerations

The following table indicates which committees should likely be involved in collaborating on each plan component. The mechanics of that collaboration and the respective roles need to be defined. Primary responsibility for coordination lies with the Committee Chairs and the Board.

	Strengthen Member Composition	Improve and Tailor Event Mix	Increase Deal Activity Among Members	Increase CREW's Stature and Visibility	Tactical Component: Update Sponsorship Categories
Sponsorship					X
Member Services		X			
Membership	X				
Programs		X		X	
CREW EDU		X			
Special Events		X		X	
CREW Foundation		X			
Community Action		X		X	
Communications			X	X	
Board of Directors	X	X	X	X	X

VI. Specific Ideas that have been Discussed

Although the purpose of this plan is to focus on goals, in order to not lose the benefit of certain specific ideas that were discussed in focus groups, the following ideas were raised:

- **Combine/coordinate sponsorship efforts for the Chapter sponsorships, Awards sponsorships, and Golf sponsorships.**
- **Coordinate the involvement of “heavy hitters” so that the engagement of these members to provide the most benefit for the organization.**
- **Have the Advisory Board meet earlier in the year (and more than once a year) to engage these senior women and obtain the benefit of their expertise earlier in the year.**
- **Have more social events/retreats with the Board of Directors that are not just meetings within the normal business day to increase interaction and “bonding” among Board members.**