



CREW Tampa Bay Strategic Plan 2021/2022

INTRODUCTION AND OVERVIEW

Commercial Real Estate Women (CREW) Tampa Bay is dedicated to the advancement of professional women in commercial real estate through networking, education, leadership development, and mentorship.

CREW Tampa Bay is the only organization in the Tampa and Greater Tampa Bay area solely dedicated to transforming the commercial real estate industry by promoting and empowering women through professional relationships, leadership opportunities and the continued pursuit of Diversity, Equity, and Inclusion. We offer the industry's richest programs, including monthly luncheons with high level speakers, tours of new and iconic buildings, seminars with industry leaders and networking opportunities, as well as exclusive "members-only" networking events. Our UCREW Foundation provides scholarships to exceptional young women in our community who have the drive and tenacity to pursue a career in commercial real estate.

Creative, groundbreaking, and influential, CREW Tampa Bay represents the full spectrum of commercial real estate disciplines, providing our membership with connections to qualified professionals to develop business opportunities and complete the deal.

We are a chapter member of CREW Network, an organization of over 12,000 members and a presence in over 75 major markets across the world.

MISSION

CREW Tampa Bay exists to transform the commercial real estate industry by promoting and empowering women through professional relationships, leadership opportunities and the continued pursuit of Diversity, Equity and Inclusion.

VALUES

Leadership and Influence: external focus; leading by example; thought leadership; speakers

Diversity, Equity and Inclusion: advocates and allies; diverse membership; diverse leadership

Mentorship: internal leadership; influence

Excellence: excellence as an organization through programming; outreach; etc.

Networking: building relationships among members

BIG AUDACIOUS GOAL

CREW Tampa Bay is the premiere organization in West Florida for all CRE Professionals actively promoting and empowering women in our industry.

- 400 diverse members
- Exemplary programs with paid superstar speakers and great visibility for our sponsors
- Fiscal soundness to allow us to support these objectives
- Providing ample opportunities for senior level executives to mentor junior level women professionals

STRATEGIC VISION

Diversity: In 2021, CREW Tampa Bay will be a diverse chapter with over 200 members representing various levels of experience.

Strategic Board: CREW Tampa Bay will transition from a working Board to a strategic Board. Committee Chairs will communicate thoroughly and consistently through their Board liaisons.



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Mentoring/Support: In addition to mentoring entry and junior level real estate professionals, we will add value to our membership by supporting executive level women in their efforts to increase their visibility including their efforts to join corporate boards.

Programs: We will engage best-in-class, well-respected national speakers for our events to elevate the profile of CREW Tampa Bay.

Marketing: CREW Tampa Bay will maintain excellence in its marketing, branding and social media strategies.

Influence: We will raise the profile of CREW Network within the Tampa Bay market. We will expand our relationships with other CREW chapters in and outside of Florida. We will encourage members to attend CREW Network events.

KEY DRIVERS FOR SUCCESS

The Right People in the Room

- Heavy hitters
- Sponsors
- Respected Industry Professionals
- Up & Comers

Excellence in Leadership

- Transition from working to strategic board
- Dedicated to the mission of CREW Tampa Bay and CREW Network
- Individuals who are engaged, thoughtful and act with integrity

Superior Program Content

- National, paid speakers for events
- Informative lunch programs
- Members-only and networking events
- Mentoring professional women and elevating executive women to corporate boards

Competitive Advantage

- Members held in high regard
- Source for skilled CRE candidates
- Access to decision-makers

Clear and Impactful Communication

- Branding/messaging
- Social media
- Forms, etc.

GOALS

Immediate

- Strategic Board Protocol
- Leadership Succession Planning
- Rich Program Content
- Process Improvement with CREW Network

Mid-Range

- Strategic Marketing and Communication Plan
- Membership Growth and Influence
- Evaluate Financial Planning and Budget

Long-Range Goals

- Mentoring and Leadership Development Program
- National Speaker/Industry Superstar for Professional Development and Relevant Topics
- Institute a DEI Strategy



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Calendar Guidelines

1. Board Meetings – 3rd Tuesday
2. Committee Meetings
3. Executive Board Call – Friday prior to Board Meetings
4. Luncheons – Typically 1st Tuesday (January, September & December sometimes fall on the 2nd Tuesday because of holidays)
5. Summer Social – Mid to Late July
6. Coffee Corners/Cocktail Corners – 2nd Thursday
7. Members Only
8. Networking/Tours
9. Annual Events
 - a. Go Fish (First Friday in May)
 - b. Economic Summit (second week in June)
 - c. Excellence Awards (November, at least one full week before Thanksgiving)
 - d. UCREW (Fall 2021)
10. Notice to be provided to the Chapter Administrator at least 6 weeks prior to all events. Notice should include the request to create an event and open registration. This provides us with 2 weeks to create and proof all marketing for the event before promoting it at the 30-day mark. This does not apply to signature events.



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Committee Action Plans

Instructions to Committee Chairs

Please review the current draft of the following documents in preparation of the template below.

1. CREW Tampa Bay Strategic Plan
2. Diversity and Inclusion Statement
3. Strategic Calendar Guidelines (for planning events and scheduling committee meetings)
4. Current CREW Tampa Bay Budget

The template below can be used for each committee to expand on goals and outline an implementation plan. Please work with your board liaison to draft your Action Plans and Proposed Budgets by the following dates.

- August 1, 2021
 - Membership
 - Programs
 - Sponsorship
 - Finance
- August 15, 2021
 - PR/Media/Member Communications
 - Members Only
 - Executive Council
- September 1, 2021
 - UCREW
 - Excellence Awards
 - City in Pink
 - Go Fish
 - Economic Summit
- December 1, 2021
 - New Committee Chairs - begin drafting 2022 Action Plans with liaisons
- January 1, 2022
 - New Committee Chairs - finalize 2022 Action Plans to present as your January Board Report



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Committee Action Plan Template			
COMMITTEE: [ENTER COMMITTEE NAME HERE]			
VALUE	COMMITTEE GOALS / OBJECTIVES	COMMITTEE IMPLEMENTATION PLAN	COST
Leadership and Influence			
External; lead by example; thought leadership; speakers			
Diversity, Equity and Inclusion			
Advocates and allies; diverse membership; diverse leadership			
Mentorship			
Internal leadership; influence			
Excellence			
Excellence as an organization; programing; outreach	Ex – Rich program content	Ex – Involve past presidents and use influence to identify potential speakers	
Networking			
Building relationships among membership			



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Diversity, Equity and Inclusion Statement

DIVERSITY IS AT THE CORE OF OUR MISSION

CREW Tampa Bay's primary mission is to foster the advancement of women in Commercial Real Estate (CRE); we believe that efforts which are important to women's success are paramount to the achievement of all CRE professionals.

At CREW Tampa Bay, we celebrate our commitment of purposeful diversity by welcoming all members regardless of their race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age or veteran status; we are committed to advancement and opportunities for all members.

Our rich programs, prolific activities, and authentic interactions are enriched by celebrating uniqueness as well as commonalities; we respect and value diverse life experiences and heritages and ensure that all voices are valued and heard; we are committed to modeling diversity and inclusion for the CRE industry, and to maintain an inclusive environment with equitable treatment for all.



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Immediate Goals – Timeline	
Target	Task
	<input checked="" type="checkbox"/> Initial strategic planning sessions with full board; introduce concept of strategic vs working board
	<input checked="" type="checkbox"/> Strategic Planning Task Force formed to draft strategic plan and timeline for Board's review
5/15/2021	<input type="checkbox"/> SPTF delivers draft Strategic Plan, Strategic Plan Timeline, Leadership Action Plan and Committee Action Plan Template to Board for review
6/1/2021	<input type="checkbox"/> Board provides comments to strategic planning documents
6/15/2021	<input type="checkbox"/> Board approves strategic planning documents and identifies board liaisons
7/1/2021	<input type="checkbox"/> Develop 2021/2022 strategy/description for Membership, Programs, Sponsorship Q3
7/15/2021	<input type="checkbox"/> Develop 2021/2022 strategy/description for PR/Media/ Member Communications, Members Only, Executive Council
8/1/2021	<input type="checkbox"/> Committee Strategic Plans due for Membership, Programs, Sponsorship
	<input type="checkbox"/> Develop 2021/2022 strategy/description for Excellence Awards, City in Pink, Go Fish, Economic Summit, UCREW
8/15/2021	<input type="checkbox"/> Committee Strategic Plans due for PR/Media/Member Communications, Members Only, Executive Council
9/1/2021	<input type="checkbox"/> Committee Strategic Plans due for Excellence Awards, City in Pink, Go Fish, Economic Summit, UCREW
9/15/2021	
10/1/2021	
10/15/2021	<input type="checkbox"/> Identification/appointment of non-board committee chairs for committees other than Membership, Programs, Sponsorship
11/1/2021	<input type="checkbox"/> Identification of future potential leaders within Membership, Programs, and Sponsorship
11/15/2021	
12/1/2021	<input type="checkbox"/> New Committee Chairs begin drafting 2022 Action Plans with liaisons
12/15/2021	
1/1/2022	<input type="checkbox"/> New Committee Chairs finalize 2022 Action Plans to present as January board report
1/15/2022	
2/1/2022	
2/15/2022	
3/1/2022	
3/15/2022	
4/1/2022	



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Immediate Goals – Timeline	
Target	Task
4/15/2022	
5/1/2022	
5/15/2022	
6/1/2022	
6/15/2022	
7/1/2022	
7/15/2022	
8/1/2022	
8/15/2022	
9/1/2022	



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LEADERSHIP ACTION PLAN			
IMMEDIATE GOALS			
GOAL	VALUE	BOARD IMPLEMENTATION	TARGET DATE
Strategic Board Protocol Transition from working board to strategic board	Leadership and Influence	Form Strategic Planning Task Force	1/2021
	Leadership and Influence	Review and approve formal Strategic Plan and Action Plans	6/15/2021
	Leadership and Influence	Clearly communicate the Mission, Vision and Values of CREW Tampa Bay to members and the CRE community	6/15/2021
	Leadership and Influence	Deliver Strategic Plan and Committee Action Plan Templates to Committee Chairs with clear instructions and board expectations; Identify Board liaisons and clarify committee descriptions	6/15/2021
	Leadership and Influence	Committees to provide Committee Action Plans to board for review; Board to review/evaluate active Committees and Committee responsibilities	8/1/2021 – 9/1/2021
Leadership Succession Planning	Mentorship	Create alternate paths to CREW Tampa Bay leadership. Ex – Entry level >> Committee member >> Mentoring >> >> Committee Chair >> Board >> Delegate >> President Elect >> President	Q4 2022



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Create a more formalized track for leadership	Mentorship	Consider a “Future Leaders” program with a focus on building skills that promote career advancement and CREW Tampa Bay board leadership.	7/1/21
Rich Program Content Maximize impacts of programs with rich program content	Excellence	Evaluate and develop potential list of national/superstar paid speakers	9/15/21
	Excellence	Coordinate with past presidents and use influence to identify potential speakers	8/1/21
	Excellence	Review the CREW Tampa Bay calendar and consider adjustments to meet our goals	ONGOING
Process Improvement with CREW Network	Excellence	Coordinate financial reporting and timelines with CREW Network	7/1/21
MID-RANGE GOALS			
GOAL	VALUE	BOARD IMPLEMENTATION	TARGET DATE
Strategic Marketing and Communication Plan Implement engaging marketing, branding and social media strategies	Excellence	Highlight our successes through marketing strategy	1/1/22
Membership Growth and Influence	Networking	Create and promote opportunities for member to member connections	10/1/21



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Increase number and maintain quality of members	Networking	Engage local industry organizations and influential leaders to actively advocate for CREW Tampa Bay's mission	1/1/22
	Networking	Recruit influential/active members from other CRE organizations to join CREW Tampa Bay	ONGOING IN 2022
	Networking	Create and promote opportunities for joint events with other CREW chapters in Florida	Q2 2022
	Excellence	Maximize benefits of sponsorship. Reconsider sponsorship categories/benefits	Q3 2022
Evaluate Financial Planning and Budget	Excellence	Revisit financial planning strategies annually	Q3 2022
LONG-RANGE GOALS			
GOAL	VALUE	BOARD IMPLEMENTATION	TARGET DATE
Mentoring and Leadership Development Program Elevate stature and influence of our members in their firms and in the industry in board positions	Mentorship	Create purposeful opportunities for members to recruit and mentor the next generation of CRE professionals	Q4 2022
	Mentorship	Create Mentoring and Leadership Development Program to ensure CREW Tampa Bay members are represented on other industry boards and at industry events	Q4 2022



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National Speaker/Industry Superstar for Professional Development and Relevant Topics	Excellence	Engage at least one paid superstar speaker annually. Coordinate with Programs Committee to develop list of potential speakers.	Q4 2024
Institute a DEI Strategy Incorporate diversity, equity and inclusion in significant ways in our programs and networking	Diversity, Equity and Inclusion	Recruit diverse base of CRE industry thought leaders and influencers	Q1 2023
	Diversity, Equity and Inclusion	Remind members to talk about CREW Tampa Bay's mission in their other organizations	ONGOING
	Diversity, Equity and Inclusion	Recruit and retain membership in diverse disciplines of CRE	Q4 2021
	Diversity, Equity and Inclusion	Create a task force to identify and retain diverse members.	Q1 2022
	Diversity, Equity and Inclusion	Create leadership opportunities in support of diversity and inclusion	Q4 2022