

Strategic Plan Snapshot

This snapshot represents the core of the strategic planning conversations.
Board members will collaborate with leaders and members of committees to operationalize these strategic directions.

Over the next 3-5 years, how can we develop CREW Austin into the premier organization for all commercial real estate professionals in this area?

By focusing our energy on...	To deal effectively with...	We will realize our...
Strategic Directions	Critical Blocks	Practical Vision
Catalyzing a Coaching Culture <ul style="list-style-type: none"> Update, streamline & share operational processes to train & empower volunteers Create structured opportunities for leaders to engage and learn from each other Celebrating Value <ul style="list-style-type: none"> Develop (& deliver) messaging about value around reasons for joining/supporting CREW Consistently share the mission and celebrate members' career advancements as organizational successes that elevate all women Cultivating a CREW Lifecycle of Engagement <ul style="list-style-type: none"> Provide support towards advancement for members at all stages of their careers CREW-nation Innovation <ul style="list-style-type: none"> Harness existing genius within membership to develop innovative ideas to enhance value Provide opportunities to develop added benefits 	<ul style="list-style-type: none"> Gaps in process awareness result in untimely & ineffective implementation of CREW operations Unfocused marketing & minimal awareness of member achievements underutilizes value & expertise Undefined continuum of mentorship to advance women in CRE Undefined audience, unclear messaging, & misperception of CREW's value/ROI deters sponsorship & membership Unbalanced member engagement results in attrition Insufficient awareness of resources & competing priorities constrains innovation 	<ul style="list-style-type: none"> Delivering transformative mentorship Supported by an enthusiastic sponsor base Known as the champion of women entering CRE careers Recognized vanguard of thought-leadership in Central Texas Philanthropic powerhouse supporting & advancing women Recognized for members who provide exceptional industry leadership Comprised of 300+ quality, diverse members Providing curated quality programs that appeal to a diverse audience

2023 Strategic Planning Session

The CREW Austin Board met in-person for 1.5 days to craft a multi-year plan for the organization to continue to develop CREW's identity as the premier commercial real estate organization in the area, and to engage leadership in bringing this future to a reality.

This report serves as documentation of the observations, insights and collective work crafted during the planning sessions on Feb. 3-4 2023.

Agenda

Welcome, Opening Context

What key questions do we hope to answer together?

Environmental Scan Review

What are the known factors of our current situation?

Practical Vision Development

What do we want for CREW in the future?

Identifying Underlying Contradictions

Why haven't we achieved this to date?

Determine Strategic Actions

What is our plan?

Implementation Workshop

Begin to develop the timeline

Environmental Scan Review

Current/baseline stats:

>80% members are in core CRE fields (QFCRE).
Ensure this strong representation of core industry professionals remains part of future recruiting efforts (CREW Network's requirement is 75%).

High # of members who are new to CREW, but majority are experienced in the industry:

CREW Austin has a majority of new members: 54% members have been members for 0- 5 years – yet more than 80% of members have more than 5 years' experience in the industry. **Lots of potential for business referrals, leadership development, and industry accolades!**

Steady growth – until now: CREW Austin has grown steadily over the past decade. Your membership peaked at 180 in 2020, and since then it's dropped by a handful to sit at 175 for the past 2 years. Using the strategies within to add value and promote benefits across all career stages, we will energize and engage the member base so growth will be jumpstarted organically.

Retention: retention rate has historically been in the very high 70% range – hitting 80% multiple times over the past decade. (80% is the industry standard for associations). We discussed retention. Obviously value is being provided; continue outreach to non-renewing members to keep them involved (Why did they join? To MEET, LEARN, or HELP?)

Demographic Data: at Y/E 2022, there were about 1/4 of members haven't completed the main demographic fields (DoB, ethnicity, gender, compensation). Over half have not completed the new data fields added in 2021 (disability & sexual orientation).

This data is important to have but is lower priority at this point.

QFCRE	Total	%
Law	20	13.5%
Construction Mgmt/General Contracting	17	11.5%
Architecture	13	8.8%
Development, Real Estate	12	8.1%
Brokerage	11	7.4%
Engineering	10	6.8%
Finance	8	5.4%
Commercial Lending	6	4.1%
Interior Design/Space Planning	6	4.1%
Asset Management	5	3.4%
Consulting	5	3.4%
Program Management/Project Management	5	3.4%
Property Management	4	2.7%
Appraisal	3	2.0%
Business Development (100% CRE)	3	2.0%
Investment Management	3	2.0%
Title/Escrow	3	2.0%
Accounting	2	1.4%
Acquisitions/Dispositions	2	1.4%
Commercial Insurance	2	1.4%
Undergraduate Student Member	2	1.4%
Corporate Real Estate	1	0.7%
CRE Executive	1	0.7%
Graduate Student Member	1	0.7%
Investor Relations	1	0.7%
Land Use Planning & Zoning	1	0.7%
Market Research	1	0.7%

QFCREs NOT Represented:

- Cost Segregation
- CRE Human Resources
- Economic Development
- Education
- Environmental
- Facility Management
- Land Surveying
- Public Sector
- Quasi-Governmental Transportation and Port Authorities
- Relocation Services, Corporate
- Risk Management

Practical Vision Development

The group crafted answers to this question: *What do we want to see for our chapter in 3-5 years as a result of our efforts?* We brainstormed individually, worked in pairs, and then discussed together. We grouped similar ideas together then named each group of ideas to describe the common achievement of those ideas.

What do we want to see for our chapter in 3-5 years as a result of our efforts?						
CREW Austin is...						
Delivering transformative mentorship	Known as the champion of women entering CRE careers	Recognized vanguard of thought leadership in Central TX	Philanthropic powerhouse supporting & advancing women	Recognized for members who provide exceptional industry leadership	Comprised of 300+ quality, diverse members	Providing curated quality programs that appeal to a diverse audience
<ul style="list-style-type: none"> Known for transforming our members into local leaders One-on-one/small group mentorship Hosts quarterly career leadership/professional development training Tangible results of 3-5 year career mentoring initiatives Topical fellowships 	<ul style="list-style-type: none"> Robust tracked CRE pipeline UCREW/CREW Careers Having a student chapter at UT 30-45 participants in UCREW scholarship program & 1+ participant in CREW Network scholarship 20 scholarships Increased scholarship dollars by 50% 	<ul style="list-style-type: none"> Premier CRE resources (media, publications, policy makers) Recognized for leading in-depth conversation and education in our respective professionals Recognizing members who have transformed and are leaders in CRE Recognized for leadership in Regional Economic Development Topical councils City of Austin & chamber recognition 	<ul style="list-style-type: none"> Signature fundraiser makes \$50K Recognized for charitable contributions Hosts on of the top 5 producing Foundation events Supporting women in our community Trifecta in January 	<ul style="list-style-type: none"> Made national news for women placed in C-suite/upper executive positions in Austin One of the leading organizations with the most female executives Most women to women business in Texas Completed full CRE development by CREW members 10 recipients of CREWnections Awards Austin members with network board & committee service Members have a smaller on o gender-pay gap than other metro areas 	<ul style="list-style-type: none"> Membership growth sufficient to support a full-time administrator 300+ members Increase membership 25% annually Developing better quality members Robust DEI (gender, cultural, etc.) 	<ul style="list-style-type: none"> Successfully partnering with other powerful women's organizations Summit is seen as "the" event for professional women Quality programming content, bringing non-members to events Increased luncheon attendance by 50% each year Engage & educate men / DEI efforts
Supported by an enthusiastic sponsor base						
<ul style="list-style-type: none"> Sponsors' ROI exceeds other Austin organizations Fill all sponsorship by Feb. 1 Sponsorships in high demand 						

Identifying underlying contradictions

Next, the group spent time exploring the external/internal obstacles and contradictions that might be in the way of the vision. They asked themselves: *Why aren't we there already? What is blocking us from moving towards our vision?*

What is blocking CREW Austin from moving towards our vision?					
Gaps in process awareness result in untimely & ineffective implementation of CREW operations	Unfocused marketing & minimal awareness of member achievements underutilizes value & expertise	Undefined continuum of mentorship to advance women in CRE	Undefined audience unclear messaging, & misperception of CREW's value/ROI deters sponsorship & membership	Unbalanced member engagement results in attrition	Insufficient awareness of resources and competing priorities constrains innovation
<ul style="list-style-type: none"> • Insufficient tracking & feedback • Year-end (calendar) membership attrition • Processes • Delayed sponsorship package execution • Untimely sponsorship rollout • Restricted/limitations in fundraising sponsorships (1 ask) • Not asking earlier for \$upport 	<ul style="list-style-type: none"> • Need broader CRE exposure • Systemic self-recognition issues • Insufficient awareness of member achievements & thought leadership • Under-reported CREW 2 CREW business • Missing creating media liaisons • Insufficient inconsistent marketing • Absent marketing & publishing • Anemic connections with media, publications, policy makers & community advocates 	<ul style="list-style-type: none"> • Inconsistent & ineffective mentorship program • Need clear mentorship vision • No mentor/mentee training • Story telling CRE paths • Limited person university champions • No one leading the charge for a student chapter 	<ul style="list-style-type: none"> • Not showing value/ROI (sponsorship/membership) • Undefined sponsor ROI • Sponsorship dependent on employer support & engagement • "CREW is for women", ghettoization or silos • Perceived value 	<ul style="list-style-type: none"> • Top echelon leaves • Weak leadership in committees • Declining veteran engagement & burnout • Overtaxed volunteers • Minimal member engagement • Unsuccessful smart grant thought leader recruitment • Declining committee engagement after 2-3 months • 80/20 rule • Limited value opportunities for legacy members • Not retaining membership b/c of lack in engagement • Unbalanced committee workloads • Member burnout • Volunteer base tapped out • Legacy • Unclear understanding at the committee level of the "WHY" for certain events or programs 	<ul style="list-style-type: none"> • Unclear vision for programs • Absent think tanks • History gets in our way (status quo) • Haven't planned/educated about philanthropic events • Missing innovation

Determine Strategic Actions

Reviewing the list of underlying contradictions, the group brainstormed a list of possible actions to answer the question:

What innovative, substantial actions will deal with the underlying contradictions and move us toward our vision?

The group arrived at **four** multi-level strategic directions and agreed to focus action in these areas to progress towards the vision.

Catalyzing a Coaching Culture	
Committee Processes <ul style="list-style-type: none">• Committees personally connect with new members• Quarterly in-person committee meetings• Create consistent format for committee/board meeting agendas• Include agenda item to discuss CREW-nnection in committee meetings• Discuss “project hot seat” at committee meetings (lesson learned, Q&A, 15-min.)• Update all playbooks with quality assurance/quality control and synergy between committees• Survey metrics• Send out sponsorship packet Nov. 1• Simplify sponsorship packet to all year-round access – but retain signups for limited time	Leadership Training <ul style="list-style-type: none">• Yearly brainstorming retreat for board, chairs & co-chairs with purpose of innovation• Board liaisons act as coach and initiate/create annual calendar of engagement• Quarterly board training, committee training• Quarterly board + chairs education with happy hour• Consolidate information and clearly communicate available resources• Foster relationships between all committee chairs (schedule quarterly coffee/happy hours)• Invite committee chairs to sponsorship meeting• Have committee members train other committee members on their delegated task (sharing knowledge)
Celebrating Value	
Marketing <ul style="list-style-type: none">• Meet, learn, help message (internal & external)• Define & understand goals of committee members & employer pressures• Include a message about CREW's value using Meet-Learn-Help in sponsorship messaging/packets• Elevate presence on social media• Verbalize the mission at every program	Recognition of Members' Achievements <ul style="list-style-type: none">• Create a platform for submitting member achievements outside board report; recognize volunteers at luncheons (not a gift card)• Intentionally create a culture of celebration of contribution (catch people doing great work)

Cultivating a CREW Lifecycle of Engagement	
Students <ul style="list-style-type: none"> • Explore sub-committee for student outreach & UT chapter advancement (combo of CREW Careers/UCREW) • Establish UT student “chapter” Legacy <ul style="list-style-type: none"> • Implement a past-president’s council, past-president’s circle or mentor program • Celebrate achievements via program/event with speaker opportunities (C-suite, legacy members) 	Mentorship <ul style="list-style-type: none"> • Board-guided mentorship vision creation • Create & launch mentorship program • Establish multi-gen special interest mentor/support groups (e.g. work-life balance, difficult conversations, charting career paths)
CREW-nation Innovation	
<ul style="list-style-type: none"> • Redesign of summit event • CREW discovery – monthly • CREW Fest/Committee networking twice/year • Host workshops for interpersonal skills, language, etc. that empower women in CRE (set boundaries, negotiate, win allies, actualize, etc.) 	<ul style="list-style-type: none"> • Assign task groups to define problems and propose solutions • Provide slush money to each committee for innovation (and celebrate what is created) • Host think tanks & publish on hot regional development issues • New fundraising event

Implementation Workshop

Within the four strategic courses of action, the group then determined priorities. While reviewing the current state of each arena, they determined what success would look like, and then prioritized the actions that could feasibly be done during the first year to move us towards success.

Strategic Direction	Current Reality	1st Year Accomplishments	Success Indicators
Catalyzing a Coaching Culture	<ul style="list-style-type: none"> • Playbooks • Committees aren't all fully staffed • Hold a y/e kick-off to transition leaders • Board is doing strategic planning • Hold Path To Lead in summer • Encourage succession planning, but it's not always being done • Budget planning • Volunteers can be flaky • Incohesive processes • Most committees have regular meetings • Very passionate and active board 	<ul style="list-style-type: none"> • Create standardized agenda for committees • Schedule 1-2 leadership training opportunities (board + committees) • Hold 1-2 leadership training events • Define liaison role & strategic board • Discuss & define succession plan for committee leaders • Update playbooks • Create matrix for survey 	<ul style="list-style-type: none"> • Collected stats, survey responses • All committees are full with established succession plan and current playbooks that they own/update regularly • Established coaches within committees • Established quarterly events for leadership with training & engagement • Cohesive processes are documented & shared • Volunteers feel supported • Members are excited to volunteer b/c they know what to do & how • Retention and engagement are high
Celebrating Value	<ul style="list-style-type: none"> • Instagram (& other social platforms) exist • Intuitive sense of value exists, but needs to be articulated • CREW-nnections • Annual member awards • Woo-fu (?) • Currently only celebrate member successes at awards events 	<ul style="list-style-type: none"> • Value messaging is created • Value messaging and expectations of use for that message are shared • Committees share with communications committee (social, web, marketing) • Liaison is cheerleader • Develop new messaging and/or delivery of CREW-nnections 	<ul style="list-style-type: none"> • Celebrate members more frequently • Social presence is well established • Affirmations are shared at committee meetings • Sponsorship funds and retention of members/sponsors are increased • Exposure in media has expanded • Industry exposure is better overall • City & Chamber have members in CREW & provide CREW exposure

Cultivating a CREW Lifecycle of Engagement	<ul style="list-style-type: none"> • Host UCREW & CREW Careers programs • No formal mentorship program is in place, just a mentorship “thingy” • No past president’s council – or anything for them to do after term • High attrition for senior-level professionals • Very few student members • No connection with UT campus • No relationship with local HBCUs 	<ul style="list-style-type: none"> • Define a Legacy group (who, what) • Kick off Legacy group • Research & envision a mentorship program • Envision an emerging leader program 	<ul style="list-style-type: none"> • Active students within the chapter • Thriving, defined, effective, consistent mentorship • Establish a past presidents council or legacy group “CREW Council of Legends” • Lots of legacy members are re-engaged
CREW-nation Innovation	<ul style="list-style-type: none"> • Many of these programs don’t yet exist, but the ideas reside within the group • Existing programs: CREW Discovery, CREW Fest, summit, foundation fundraiser event • No slush \$ or room for changes during the year if committees have new ideas • Don’t have the 2023 calendar set • No Think Tanks 	<ul style="list-style-type: none"> • Host 1+ roundtable • Create new committee structure • Re-imagine summit, host • Calendar is developed by Dec. for 2024 • Research new fundraiser event • Have a budget discussion for slush fund in 2024 	<ul style="list-style-type: none"> • Restructure committees • New successful fundraising & summit events • Funds available (flexibility within budget) for committee ideas/events • Think tank established, providing new ideas

Implementation Workshop (cont.)

Identifying priorities of the first-year accomplishments was done as a group exercise to spread the work across different groups (committees, board, administrator) and keep requested tasks manageable.

Proposed timeline for completion of first-year accomplishments:

Strategic Direction	Q2 + (Feb - Jun '23)	Q3 (Jul-Sept '23)	Q4 (Oct-Dec '23)
Catalyzing a Coaching Culture	<ul style="list-style-type: none"> Create/share standardized agenda for committee use (Elise, board) Develop training & schedule 1-2 leadership training opportunities (Jen Martin, board) Define liaison role & strategic board (Jen Seay, board) Discuss & define succession plan for committee leaders (Stephanie, membership/ member services) Initial round of updates to playbooks completed (Jen Paisley, board) 	<ul style="list-style-type: none"> Updated playbooks submitted for approval (Jen Paisley, board) Hold #1 leadership training event (Jen Martin, board) 	<ul style="list-style-type: none"> Updated playbooks rolled out to committees (Jen Paisley, board) Hold #2 leadership training event (Jen Martin, board) Create matrix for survey (Kathleen, member services)
Celebrating Value	<ul style="list-style-type: none"> Value messaging is created (Jen Jarl, communications) Liaison is cheerleader (Kelly, board) Develop new messaging and/or delivery of CREW-nnections (Kathleen, member services) 	<ul style="list-style-type: none"> Value messaging and expectations of use for that message are shared (Jen Jarl, communications) Committees share info w/ communications comm (Jen J, comms) 	
Cultivating a CREW Lifecycle of Engagement	<ul style="list-style-type: none"> Define a Legacy group (Elise, board) Research mentorship program (JoEllen, member services) Envision an emerging leader program (Kelly, UCREW) 	<ul style="list-style-type: none"> Continue to research mentorship program (JoEllen, member services) Kick off Legacy group (Elise, board) 	<ul style="list-style-type: none"> Envision a mentorship program (JoEllen, member services)
CREW-nation Innovation	<ul style="list-style-type: none"> Develop plan for roundtable event (Nina, board) Create new committee structure (Maria, board) Execute re-imagined summit, (Stacy, board, TBD) 	<ul style="list-style-type: none"> Cont. research new fundraiser event (Stacy, Amanda/Aaron) Have a budget discussion for slush fund in 2024 (Jen A., Finance) Host 1 roundtable & issue survey (Nina, board) 	<ul style="list-style-type: none"> Cont. research new fundraiser event (Stacy, Amanda Aaron/Alexis M.) Calendar is developed by Dec. for 2024 (Jen P, board)

	<ul style="list-style-type: none"> Research new fundraiser event (Stacy, Amanda Aaron/Alexis M.) 		<ul style="list-style-type: none"> Summarize roundtable & survey findings (Nina, board)
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