



# STRATEGIC PLAN

JUNE 2021

# **CREWBaltimore – Strategic Plan**

## **10 YEAR – BIG GOAL**

- ▶ **Be the PREMIER Professional Organization for Doing Business and Advancing Women in Greater Baltimore**

## **5 YEAR - GOALS**

- ▶ **Establish Importance of CREW in Greater Baltimore CRE**
- ▶ **Be the Leader of DEI Education & Advocacy in Greater Baltimore CRE**
- ▶ **Establish Robust, Effective Membership Ecosystem**
- ▶ **Maintain Robust, Effective Membership Ecosystem**
- ▶ **Establish Financial Strength & Flexibility**
- ▶ **Establish and Execute Intentional, Mission Driven, Community Outreach**

## GOAL 1

### *Establish Importance of CREW in Greater Baltimore CRE*

#### ▶ **Objective 1: Increase Program Attendance**

##### ▶ (a) Members by 30% | 25 people per Major Program

▶ *STRATEGY 1: Send Event Invites to Membership's Virtual Calendars.*

▶ *Tactic: CREWAdmin to send out each quarter or as needed.*

▶ *STRATEGY 2: Dynamic Speakers, Innovative Topics, Consistent Program Calendar*

▶ *Tactic: Line item in Budget for Paid, Big Name Speaker. (1/year)*

▶ *Tactic: Offer different formats throughout the year to cater to all members.*

▶ *Tactic: Programs to build & maintain master database of speakers – past/prospective.*

##### ▶ (b) Guests by 25% | 15 people per Major Program

▶ *STRATEGY 1: Utilize Comp Tickets to Invite specific individuals to events.*

▶ *Tactic: Chapter Leadership Survey prior to each event: Who do you think would benefit from this event? (Sent to full Board and Chairs)*

▶ *Tactic: Line item in Budget for Increased Comp Tickets per event.*

#### ▶ **Objective 2: Increase Involvement of Large Greater Baltimore Companies, Individuals, Influential Leaders**

▶ (a) Civic Entities = 5, Civic Memberships = 10

▶ (b) Private Companies = 30, Private Full Memberships = 40

▶ (c) Public Companies = 25, Public Full Memberships = 25

▶ (d) BBJ – Top 100 Women = 10

▶ *STRATEGY 1: Utilize Comp Tickets to invite specific individuals to events.*

▶ *Tactic: Same as G1-O1b.*

▶ *Tactic: Executive, Membership, and Past President's Committees to meet bi-annually to establish target list.*

- ▶ *STRATEGY 2: Use Speaking opportunities to attract target membership.*
  - ▶ *Tactic: Membership Outreach following each event to request membership from individual or company representative.*
- ▶ *STRATEGY 3: Craft Sponsorship levels with flexibility and clear ROIs.*
  - ▶ *Tactic: Sponsorship to review and adjust Sponsorship packages, levels annually in their retreat.*

▶ **Objective 3: Build partnerships with like-minded, local professional organizations**

- ▶ *STRATEGY 1: Executive Committee to be the link with these organizations & their leadership.*
  - ▶ *Tactic: EC to establish who these organizations are – aligned with our mission.*
  - ▶ *Tactic: EC to define structure & establish goals around these relationships & partnerships.*
  - ▶ *Tactic: Build budget items for partnership involvement (sponsorships, events, etc.)*

## **GOAL 2**

### ***Leader of DEI Education & Advocacy in Greater Baltimore CRE***

- ▶ **Objective 1: Drive IDEA (Inclusion, Diversity, Equity, Advocacy) Goals for the Chapter.**
  - ▶ *STRATEGY 1: Establish official IDEA Committee and Board Position.*
    - ▶ *Tactic: Establish IDEA Champion Team.*
    - ▶ *Tactic: IDEA Champion Team and Executive Committee to partner and draft IDEA Execution Plan.*
    - ▶ *Tactic: Present Plan and Board proposal at Board Meeting.*
  - ▶ *STRATEGY 2: Commitment by all Committees for involvement and prioritization.*
    - ▶ *Tactic: Each Board Member and Committee Chair to sign MOUs annually to reinstate importance & significance in our Chapter and community.*
    - ▶ *Tactic: IDEA Champion Committee (or Board Director – if approved) audits each aspect of chapter operations (along with Executive Committee) to validate plan adherence.*
  - ▶ *STRATEGY 3: Align with CREWNetwork DEI Playbook and Mission.*
    - ▶ *Tactic: IDEA Champion Team to review in depth for alignment and success.*
    - ▶ *Tactic: Annual meeting with CREWNetwork DEI Taskforce leadership.*
  
- ▶ **Objective 2: Be a known resource for IDEA education, alliance in Greater Baltimore.**
  - ▶ *STRATEGY 1: Educate members of IDEA Committee and Board to better message our program and IDEA topics.*
    - ▶ *Tactic: Enroll in CREWNetwork trainings or other curated, custom trainings.*
    - ▶ *Tactic: Setup meetings with local DEI strong organizations and leaders to learn about opportunities.*
  - ▶ *STRATEGY 2: Our trained members are available speakers and partners for our like-minded, local professional organizations.*
    - ▶ *Tactic: Prioritize in our PR and Outreach efforts.*

## **GOAL 3**

### ***Establish Robust, Effective Membership Ecosystem***

- ▶ **OBJECTIVE 1: Increase Overall Membership by 40% (150 Member Chapter)**
  - ▶ *STRATEGY 1: Replace Attrition and Grow Membership each year.*
    - ▶ *Tactic: Review attrition numbers at close of Q1 each year.*
    - ▶ *Tactic: Build mid-year programming to target new member candidates.*
  
- ▶ **OBJECTIVE 2: Embrace & Mature Affiliate Program**
  - ▶ *STRATEGY 1: Establish Affiliate Company Categories most beneficial for the Chapter.*
    - ▶ *Tactic: Survey members for what companies they would like to have more access to.*
  - ▶ *STRATEGY 2: Recruit (2) Companies per desired Affiliate Category.*
    - ▶ *Tactic: Set priority list of companies that align with CREW mission (WBE, Commercial, etc.)*
    - ▶ *Tactic: Establish a wait list and revisit annually based on member involvement.*
  
- ▶ **OBJECTIVE 3: Consistently Communicate Member-Only Benefits**
  - ▶ *STRATEGY 1: Overshare the Benefits.*
    - ▶ *Tactic: Create a PR annual calendar for Benefits to showcase. Restart each year. (Information, Testimonials, CREWBiz examples)*
    - ▶ *Tactic: Set a space in each Newsletter for CREWBiz – CREWFirst M2M Business Stories and for members to post their successes.*
    - ▶ *Tactic: Continuation of Member-Only Benefits content in Programming (ie. Convos with your Prez).*
  - ▶ *STRATEGY 2: Educate Membership with the “Why CREW?” Elevator Pitch.*
    - ▶ *Tactic: Membership and Sponsorship Leadership to host an annual event.*
  
- ▶ **OBJECTIVE 4: Increase Participation in Chapter Committees by 50%**

► *STRATEGY 1: Make each Committee Member feel welcomed, important, valued, and accountable.*

- *Tactic: Committee Chairs to keep committee rosters current and accurate.*
- *Tactic: Committee's Board Director and Chair build an onboarding plan for their committee roles – Director, Chair, Sub-Committee Leaders, General Members, etc - to drive clarity and mission.*
- *Tactic: Create small groups inside the committees to achieve focused goals.*

► *STRATEGY 2: Succession Planning by Committee Leadership.*

- *Tactic: Committee Chair becomes Board Director, with Executive Committee approval.*
- *Tactic: Clarity in Succession for consistency in knowledge, leadership.*

► *STRATEGY 3: Education on Committees*

- *Tactic: Committees discussion during Membership onboarding call.*
- *Tactic: Create onboarding materials including descriptions of all committees and responsibilities to be shared with new members and to be on our website.*
- *Tactic: Annual topic for Convo with your Prez series.*

► **OBJECTIVE 5: Focus on Targeted Recruiting by Membership Committee.**

► *STRATEGY 1: Activate Recruiting Sub-Committee*

- *Tactic: Nominate a legacy leader to establish & build the program.*

## **GOAL 4**

### ***Maintain Robust, Effective Membership Ecosystem***

#### ▶ **Objective 1: Track Chapter Health, Continuous Improvement**

- ▶ *STRATEGY 1: Annual Survey distributed to full membership.*
  - ▶ *Tactic: Committee Leaders and Board to draft the survey for what metrics, information are priority for the year. Distribution in June.*
- ▶ *STRATEGY 2: Committee Driven Constant Feedback.*
  - ▶ *Tactic: Committee members to be responsible for getting feedback from their deliverables, events, processes, etc.*
  - ▶ *Tactic: Committee Directors to debrief Board annually in June and December.*
- ▶ *STRATEGY 3: Check Chapter Finances Quarterly.*
  - ▶ *Tactic: Finance Committee to provide end of quarter feedback with established health metrics and goal achievements.*

#### ▶ **Objective 2: Maintain Annual Membership Retention Goal of 85% (or higher)**

- ▶ *STRATEGY 1: Activate Successful Sub-Committees in Membership Committee*
  - ▶ *Tactic: Develop Onboarding, Engagement, Recognition Focused Teams under Membership.*
- ▶ *STRATEGY 2: Cultivate Personal Connections & Business Relationships*
  - ▶ *Tactic: Formalize CREWMates program & champion under Membership Committee.*
- ▶ *STRATEGY 3: Establish Membership Success Program*
  - ▶ *Tactic: Assign Chapter Coach for each New Member for 180 Days.*

#### ▶ **Objective 3: Increase Member-to-Member Business Examples by 25%**

- ▶ *STRATEGY 1: Concerted effort to facilitate & track M2M examples, stories.*
  - ▶ *Tactic: Membership Committee to track M2M business examples/stories.*
  - ▶ *Tactic: Dedicated Spotlights in our PR - Social Media, Newsletter, etc.*



- ▶ *Tactic: Dedicated Spotlights at our Events.*
- ▶ *Tactic: Dedicated Open Forums/Spotlights in Board Meetings, Committee Meetings.*
- ▶ *Tactic: Incentivize M2M business with Chapter Award, Recognition.*
- ▶ *Tactic: Create programming that showcases M2M business – ie. Construction Tours, Speaker Panels for one project, etc.*

▶ **Objective 4: Be the organization with the most innovative, interesting, future thinking programming.**

- ▶ *STRATEGY 1: Drive continuous improvement in our programming efforts.*
  - ▶ *Tactic: Develop a document/resource to audit our programming before and after the event. This item to include all committees for input, feedback.*
- ▶ *STRATEGY 2: Provide programming that is relevant to our membership, local CRE-industry, community.*
  - ▶ *Tactic: Survey and/or direct outreach to our membership, sponsors, local industry leaders, and community partners.*

## **GOAL 5**

### ***Establish Financial Strength & Flexibility***

- ▶ **Objective 1: Implement Governing Rule - Chapter Operations Establish Budget; Budget Supports Operations.**
  - ▶ *STRATEGY 1: Understand upcoming goals of Chapter to ensure budget and committee's annual plans support the goals.*
    - ▶ *Tactic: Each Committee to provide one page narrative of goals, requests with annual budget for review & discussion.*
    - ▶ *Tactic: Committee leaders to attend monthly Finance meeting for open discussion and check-ins.*
    - ▶ *Tactic: Executive Committee to build chapter leadership budget.*
  
- ▶ **Objective 2: Annual Sponsorships to increase by 300% (\$90,000).**
  - ▶ *STRATEGY 1: Increase efforts dedicated to Annual Sponsorships.*
    - ▶ *Tactic: Increase general membership involvement in Sponsorship Committee.*
    - ▶ *Tactic: Chapter Officers (P, PE, T, S) to have active role in Sponsorship Committee.*
    - ▶ *Tactic: Past President's Committee to remain active and be steadfast in finding, retaining Platinum sponsors.*
  
  - ▶ *STRATEGY 2: Validate Sponsorship Packages, Levels every other year for current market value.*
    - ▶ *Tactic: Use the Sponsorship Committee's Buddy System for feedback from current sponsorships.*
    - ▶ *Tactic: Sponsorship Committee to track sponsorship levels for other professional organizations in Baltimore and fellow CREW chapters for areas of growth.*
  
  - ▶ *STRATEGY 3: Hold Annual Sponsorship Drive.*
    - ▶ *Tactic: Incentivize membership involvement & recruited sponsorships successes. (Award, Prizes)*

- ▶ *Tactic: Develop documents/resources to showcase sponsorship dollar applications. (Needs/wants.)*

- ▶ **Objective 3: Increase number of Affiliate Members.**

- ▶ *See Goal 3 – Objective 2.*

## GOAL 6

### *Establish and Execute Intentional, Mission Driven, Community Outreach*

- ▶ **Objective 1: Support CREWNetwork Foundation's Programs Annually. (CREW Careers, UCREW, Industry Research, Scholarship Funding)**
  - ▶ *STRATEGY 1: CREW Careers – Build clear partnership with Junior Achievement.*
    - ▶ *Tactic: Nominate liaison to Junior Achievement to be precise in our involvement.*
    - ▶ *Tactic: Establish Involvement Plan to be executed annually. Include costs in budget.*
    - ▶ *Tactic: Communicate Involvement to Membership, Sponsors, and local-market.*
  - ▶ *STRATEGY 2: UCREW - Build stronger relationship with Morgan State University.*
    - ▶ *Tactic: Nominate liaison to Morgan State University to be precise in our involvement.*
    - ▶ *Tactic: Establish Involvement Plan to be executed annually. Include costs in budget.*
    - ▶ *Tactic: Communicate Involvement to Membership, Sponsors, and local-market.*
  - ▶ *STRATEGY 3: Industry Research – Educate membership, sponsors, and local CRE-market on value of CREWNetwork Benchmark Studies and Research Papers.*
    - ▶ *Tactic: Organize Chapter Event to present and discuss this Industry Research annually.*
    - ▶ *Tactic: Highlight this information to recruit sponsors and members.*
    - ▶ *Tactic: Use this Industry Research to discuss with other like-minded, professional organizations to grow partnerships.*
  - ▶ *STRATEGY 4: Organize a Scholarship Funding Drive.*
    - ▶ *Tactic: Annual event with the goal of hitting \$10,000 – with creative strategies for involvement (ie. big ticket raffle item)*

► **Objective 2: Make a philanthropic difference in local Baltimore community.**

► *STRATEGY 1: Support at-least one local non-profit that empowers women.*

- *Tactic: Nominate champion to drive organization & involvement.*
- *Tactic: Establish Involvement Plan to be executed annually. Include costs in budget.*
- *Tactic: Communicate Involvement to Membership, Sponsors, and local-market.*