

*connecting for success*



**PHILADELPHIA**

commercial real estate women

# 2018 – 2022 Strategic Plan

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# The Strategic Planning Process

In 2017 CREW Philadelphia launched a strategic planning process to set the direction of the organization for the next five years. As our membership base grows and changes, the needs of membership evolve. The strategic planning process was designed to include our members, so that we could better understand how to serve their needs and support them as they grow their professional network and continue to develop their skills. We also talked to former members and other CREW chapters to get a sense of what works well and what could be fine-tuned.

## The strategic planning process included:

### Surveys of:

- Current Members
- Former Members
- Potential Members

### Interviews with:

- Current Members
- Former Members
- Other CREW Chapters

### Focus Groups with:

- Current Members

## What we heard:

CREW Philadelphia is comprised of a strong network of members who want to support one another, do business together and develop lasting connections as they grow and advance in their careers. They asked for:

- Increased support for one-on-one relationship building and business development, including bringing more decision makers and more men into conversations
- High quality programming with a focus on education including events featuring panels of experts to provide exclusive insight related to industry knowledge and current topics outside of commercial real estate
- A diversity of events in terms of size, location & time, to improve access for all members
- Increased support of college & early career professionals
- Enhanced communication across and among the Board, committees and general membership

# CREW Philadelphia

## Our Mission

To advance the success of women in commercial real estate.

## Our Values

<b>Leadership</b>	A comprehensive approach to develop and exhibit the best qualities of collaborative leadership
<b>Excellence</b>	The highest standards and integrity in business
<b>Influence</b>	The power to be an agent of positive change
<b>Community</b>	Support, assistance and personal connection among CREW Philadelphia members
<b>Advancement</b>	Leadership development, education and opportunities across various life and career stages
<b>Networking</b>	Giving and getting business across the Philadelphia chapter and CREW Network

## Our Vision

To be the premier real estate networking organization in the region.

# Strategic Goals 2018 - 2022

<p><b>I. Elevate the value of membership</b></p>	<p>Strengthen relationships among members, deliver high quality events and create opportunities for professional development.</p>
<p><b>II. Attract members of varying ages, genders, ethnicities, industry specializations and career stages</b></p>	<p>Unite a diverse network of women in commercial real estate by supporting our future members – women in high school and college – retaining our senior members and enhancing the way we engage with new members.</p>
<p><b>III. Enhance and support communication to promote an inclusive culture</b></p>	<p>Bring clarity and transparency to communication among our Board, Committees and general membership and increase opportunities for interaction among all groups.</p>
<p><b>IV. Elevate the stature and recognition of the organization in the community</b></p>	<p>Engage high profile organizations in the region to attract new sponsors and members, and increase media exposure.</p>
<p><b>V. Ensure the health of the organization</b></p>	<p>Maintain good governance practices to ensure the sustainability of our organization and support growth.</p>

# Goal I: Elevate the Value of Membership

<p><b>Key Objectives</b></p>	<ul style="list-style-type: none"> <li><b>A. Relationships:</b> Increase support for one-on-one relationship building among members</li> <li><b>B. Business:</b> Increase support for business development</li> <li><b>C. Programming:</b> Hold high quality, high value events with a diversity of programs – content, location, time</li> <li><b>D. Resources:</b> Increase member knowledge of, and access to, resources at a local and Network level</li> <li><b>E. Professional Development:</b> Provide opportunities for professional development</li> </ul>
<p><b>Strategic Initiatives</b></p>	<p><b>Relationships:</b></p> <ul style="list-style-type: none"> <li>• Strengthen relationships among members by continuing to hold intimate, member only events. Expand small scale meeting topics so that some are of general interest and some are field specific. Encourage greater participation in committees to promote building of relationships &amp; member engagement in the organization (see goal IIIc).</li> </ul> <p><b>Business:</b></p> <ul style="list-style-type: none"> <li>• Hold at least one event or program annually where business development and networking is a main focus or topic. Provide structure and facilitate activities to promote networking at all events possible.</li> </ul> <p><b>Programming:</b></p> <ul style="list-style-type: none"> <li>• Develop a dynamic Events Strategy that ensures that meetings and events span a variety of times of the day and days of the week and that event locations are rotated to venues inside and outside of Center City, to improve accessibility for members.</li> <li>• Annually solicit suggestions from members about topics for events. Feature panels of experts to provide exclusive industry insight. Focus on cutting edge subjects, including those outside of commercial real estate. In smaller programs, cover targeted topics for specific sections of the commercial real estate industry &amp; specific career levels.</li> </ul> <p><b>Resources:</b></p> <ul style="list-style-type: none"> <li>• Produce and implement a Communication Strategy to reach members and effectively get them the information they need (for example, the introduction of a resource table at every event with local chapter and network information). Implement a system to solicit regular feedback from members.</li> </ul> <p><b>Professional Development:</b></p> <ul style="list-style-type: none"> <li>• Create a diversity of formal professional and leadership development programs targeted at early, mid and senior level members. Provide opportunities for members to attend CREW Network conventions and leadership summits through scholarships.</li> </ul>

# Goal II: Attract members of varying ages, genders, ethnicities, industry specializations and career stages

<p><b>Key Objectives</b></p>	<ul style="list-style-type: none"> <li>A. <b>Diversity:</b> Maintain a diverse membership in terms of field of commercial real estate</li> <li>B. <b>Connect Early:</b> Increase awareness of CREW at local colleges (using minimal resources)</li> <li>C. <b>Invest Early:</b> Support the professional development of college women in commercial real estate</li> <li>D. <b>Retain Expertise:</b> Engage and retain senior level members</li> </ul>
<p><b>Strategic Initiatives</b></p>	<p><b>Diversity:</b></p> <ul style="list-style-type: none"> <li>• Develop a targeted, dynamic recruitment strategy that responds to our changing membership base over time.</li> </ul> <p><b>Connect Early:</b></p> <ul style="list-style-type: none"> <li>• Maintain a presence at local colleges and engage CREW members who are involved in education to act as CREW ambassadors within their institutions.</li> </ul> <p><b>Invest Early:</b></p> <ul style="list-style-type: none"> <li>• Assign a mentor to local chapter scholarship winners and develop strategy to keep them engaged post-award. Increase the number of complimentary registrations for students to attend CREW events.</li> </ul> <p><b>Retain Expertise</b></p> <ul style="list-style-type: none"> <li>• Create an advisory team of past presidents to leverage their insights and experience when planning events and development programs. Create a targeted program content for the development of senior level women.</li> </ul>

# Goal III: Enhance and Support Communication to Promote an Inclusive Culture

<p><b>Key Objectives</b></p>	<ul style="list-style-type: none"> <li>A. <b>Communication:</b> Enhance ongoing internal and external communication among the committees, Board and membership</li> <li>B. <b>Accessibility:</b> Increase accessibility of CREW Philadelphia leadership</li> <li>C. <b>Onboarding:</b> Enhance the new member onboarding process</li> </ul>
<p><b>Strategic Initiatives</b></p>	<p><b>Communication:</b></p> <ul style="list-style-type: none"> <li>• To enhance the flow of information among and across the Board, Committee Co-Chairs and the general membership, the new Communication Strategy will include:             <ul style="list-style-type: none"> <li>• Clear definitions of all leadership roles.</li> <li>• A specific strategy to ensure that all members understand the reasons behind any structural or bylaw changes.</li> <li>• To ensure its continued practice, the annual mid-year retreat between Committee Co-Chairs and Board - with a focus on working on priority topics – will be written into the Communication Strategy.</li> </ul> </li> </ul> <p><b>Accessibility:</b></p> <ul style="list-style-type: none"> <li>• There will be presence from the Board at each event, with Board members serving as greeters. When seated, Board members will be dispersed among the general membership to provide opportunities for questions and conversations with current leadership.</li> </ul> <p><b>Onboarding:</b></p> <ul style="list-style-type: none"> <li>• The organization - Every new CREW Philadelphia member will receive a welcome message, information about their membership and available resources, and recognition at events. Volunteers from all parts of the organization will act as ambassadors to new members. Board members and committee Co-Chairs will actively participate in new member events.</li> <li>• Committees - An existing committee member will provide each new committee member with information about the committee's purpose, expectations and activities.</li> </ul>

# Goal IV: Elevate the Stature and Recognition of the Organization in the Community

<p><b>Key Objectives</b></p>	<ul style="list-style-type: none"> <li><b>A. High-profile:</b> Target high-profile companies in the region for sponsorship and membership</li> <li><b>B. Engagement:</b> Achieve high sponsor engagement and retention by providing value to the sponsors</li> <li><b>C. Exposure:</b> Increase media and community exposure</li> <li><b>D. Signature &amp; Network Events:</b> Hold CREW Philadelphia signature events and host CREW Network meetings to raise recognition in the community</li> </ul>
<p><b>Strategic Initiatives</b></p>	<p><b>High-profile:</b></p> <ul style="list-style-type: none"> <li>• Develop a formal strategy to recruit high-profile members.</li> </ul> <p><b>Engagement:</b></p> <ul style="list-style-type: none"> <li>• Engage sponsors through opportunities for sponsor exposure at events and on social media. Ensure personal thanks from Board members.</li> </ul> <p><b>Exposure:</b></p> <ul style="list-style-type: none"> <li>• Develop a public relations strategy; press releases, social media, e-blasts and encourage members to nominate one another for awards. Maximize the effectiveness of the charitable donation through increased involvement with our philanthropic partner.</li> </ul> <p><b>Signature &amp; Network Events:</b></p> <ul style="list-style-type: none"> <li>• Continue to support the success of our signature events and develop a strategy to leverage them for CREW Philadelphia exposure.</li> <li>• Develop a strategy to secure the CREW Network Convention, or as a second priority, the CREW Network Leadership Summit.</li> </ul>

# Goal V: Ensure the Health of the Organization

<b>Key Objectives</b>	<b>A. Health:</b> Maintain financial health <b>B. Governance:</b> Ensure good governance practices
<b>Strategic Initiatives</b>	<b>Health:</b> <ul style="list-style-type: none"><li>• Continue the annual budget process at Board and Committee levels.</li><li>• Maintain a reserve.</li><li>• Continue regular assessment of organization spending.</li><li>• Determine a minimum number of free registrations that each committee can use towards achieving their annual goals.</li></ul> <b>Governance:</b> <ul style="list-style-type: none"><li>• Review and update all policies, procedures and bylaws on a regular basis.</li><li>• Periodically evaluate the election, co-chair, and Second Delegate selection process.</li><li>• Regularly assess and communicate progress against the strategic plan.</li><li>• Annually evaluate chapter performance against CREW Network Gold Standards.</li></ul>

# Contact Us

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