



# CREW-LA

2018 STRATEGIC PLAN  
3 - 5 YEARS

## VISION

CREW-LA will be the premier commercial real estate organization in Los Angeles for networking, building professional relationships, developing business opportunities, sharing of current trends and expertise, and promoting leadership development, and advancement of women in the commercial real estate industry.

## MISSION

To advance the success of women in commercial real estate by providing opportunities for business development and professional growth.

## PURPOSE

At CREW-LA we exist to influence the success of the commercial real estate industry by advancing the success of women.

## CORE OPERATING VALUES

The fundamental values or ideals of the chapter. These values articulate ideals that the chapter aspires to hold itself accountable for and offer guidance for how the organization should carry out its mission.

### LEADERSHIP

Supports the commercial real estate industry by helping women develop their leadership skills to succeed, advance their careers and develop into future leaders.

### ADVANCEMENT

Provides opportunities for advancement through mentorship, leadership training, business development, networking and professional development.

### EXCELLENCE

Helps women apply the highest standards in business, networking, and philanthropy by promoting the best programs and events and giving back to the community by raising funds for other worthy causes.

### INFLUENCE

Assists women in developing their inherent talents and power to provide positive and collaborative influence in the commercial real estate industry.

### INTEGRITY

Operates within the stated values of the organization, to meet the goals of the mission, with an honesty and goodwill for each point of view to reach collaborative decisions, within a framework of trust and respect. The decisions of the chapter endeavors to instill the importance of being true to ones' self and, at the same time, fosters collaboration and respect among members.

### COMMUNITY

Provides a professional membership based environment that encourages members to collaborate their efforts, support each other and serve the community.

# PLANNING HORIZON

## ASSUMPTIONS ABOUT THE FUTURE

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This is a set of beliefs about the environment that frames the chapter's work. The assumptions inform the approach to the work. Foresight about the relevant future is what will make the long-range plan strategic. When conditions change, strategy needs to be adjusted. An annual review will help the chapter ensure the ongoing relevance of its strategy.

### DEMOGRAPHICS

1. Baby Boomers are being replaced by Echo Boomers. And because of their preferences, we have fewer bodies coming in and demanding real estate.
2. Demographics are destiny and we should see a slow-growth economy for the next 20 years. It's difficult to imagine the growth we've been used to over the next few decades.
3. It's an uber-tight market: space in newer assets is loosening, but still tight.
4. Median income continues to decline in suburban markets where two-income households have "been destroyed". We are starting to add some of those second incomes back into the workforce. This will have huge implications, especially in retail.
5. Adapting and addressing the generational gap given the presence of multiple generations in the workforce. Differences in attitudes and work ethic between Baby Boomers, Gen X (Echo Boomers), Gen Y (Millennials), and Gen Z.
6. The younger generation will be entering the workforce, creating challenges on how each generation uses tools and technology.
7. People will increasingly do business from any location by telecommuting.
8. There will be an increased emphasis on balancing work and personal lives.
9. Women will continue to focus on their career paths early in life.

### TECHNOLOGY

1. Construction and supply in the technology sector has fallen off, citing sluggish growth and fewer options.
2. Trends such as "telecommuting", free-address or non-assigned seating and open office benching layouts will continue to reduce the overall demand for square footage and office leasing.
3. There is an increase in virtual home or satellite offices, as well as, competing interests in keeping employees in the office to build culture and increase mentoring and knowledge sharing.
4. Technology to continue to evolve through multiple platforms including video conferencing, Skype, Web, Social Media, and use of small hand-held devices.
5. Technology will continue to be disruptive, changing how business is done day-to-day.
6. There are currently 1,238 top Real Estate Technology companies being tracked in 12 categories across 60 countries, with a total of \$27.4 billion in funding.
7. Commercial Real Estate Search: Tools that help consumers/businesses find commercial real estate for rent and/or sale. Examples include shared working space search engines as well as traditional commercial real estate search engines.
8. Construction Management: Technologies that help teams manage the construction of new buildings.
9. Facility Management: Technologies focused on building efficiency and long-term sustainability, from large structures to individual home units. Examples include quantifying the building (energy usage, water usage, etc.), making buildings more efficient, and building inspections.
10. Indoor Mapping: Companies that help create indoor models for the real estate industry. Examples include cameras that produce 3D renderings and visualization platforms that allow users to interact with floor plans.
11. Portfolio Management: Technologies that real estate investors use to make smarter investment decisions as well as platforms to make investments. Examples include listing data trackers, information on REITs, and real estate crowdfunding.
12. Property Management: Technologies that help in the day-to-day operation of real estate rentals. Examples include tenant management, electronic payments of rent, and tools for landlords and tenants to communicate.
13. Real Estate Agent Tools: Technologies that help real estate agents do their jobs, as well as technologies that effectively automate it. Examples include real estate specific CRMs, real estate agent review platforms, and marketing tools.

# PLANNING HORIZON

## ASSUMPTIONS ABOUT THE FUTURE

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### ECONOMY

1. The Changing Global Economy: The IMF has revised GDP growth downward for much of the globe in 2016-17, as economic uncertainties continue and intensify. Currency issues, declining exports, and soft energy prices add to volatility (as reflected in the stock markets in early 2016 and Moody's recent downgrade of Saudi Arabia). Political issues and conflict undermine stability as well.
2. Corporate profits are falling; business investments are falling. Interest rates will probably rise, though the Fed is more dovish than hawkish. Even though profits are down, businesses want to hire and wages are rising in some areas.
3. In the search for yield, liquidity is high, pricing is higher, but capital is likely to remain aimed at commercial real estate
4. The US has seen five consecutive quarters of profit decline without a decline in employment. The last time we saw that was in 1987, harkening back to the Black Monday crash. It could be the energy sector, or it could be multinational activities abroad. And we may see a pullback in hiring after all, or layoffs which could contract profits.
5. Unemployment rates empirically mirror the commercial real estate cycle, and low unemployment is meeting with historic peaks across all specialties of commercial real estate.
6. As developers search for greater growth by exploring mega trends, they look to secondary and tertiary markets. The current lack of construction will set the market up for a different cycle. It's an opportunity for value-add. The issue remaining is pricing. Investment will chase select assets, risk-taking will increase. There will be bad deals made.
7. Additions to existing multifamily stock are very large in some metro areas. This begs the question: Is construction peaking?
8. Regarding the price per square foot in multifamily, in the suburbs there is very little new construction. The problem is the amount concentrated in small locations and units pushing against profitability ceiling. Eighty-eight percent of all units underway require an income of \$75,000, which means renters by choice. We have to ask: How deep is that pool?
9. What happens when interest rates rise? Typically, the Fed raises interest rates when we see economic growth, but there are no worries about rising cap rates. We're seeing good rent growth and tracking construction coming out of the ground. There is growth and demand for Class A, which has been leaps and bounds ahead of other asset classes.
10. Companies look at the bottom line and budget cuts will continue to impact commercial real estate professionals.
11. Employee reimbursement plans will continue to diminish, thereby impacting membership as some members may be unwilling to go out-of-pocket to pay membership fees, unless ROI is tangible, making networking and quality of programs very important.
12. Dichotomy in income levels will continue to be an issue.
13. There will be an increase in governmental debt impacting the multi housing market, debt regulation and availability of credit.
14. Business networking will be even more important to understand multiple markets and opportunities throughout the Network.
15. The office realm is likewise looking down. New space is 50 percent of 2007 levels. There are fewer choices than in the last 16 years, though there are opportunities in value-add.
16. Retail received some mixed attention: At high-quality locations, things look stronger. But there is no activity at the bottom of the market; the patient is dead. The top of the market is seeing high demand and rent growth with store closures in weak locations and openings in strong locations. Investors are seeking density foremost because if a retailer leaves, it can be easily replaced. Location is key.
17. There is some good news, Industrial is strong. We're seeing 50 percent higher growth compared to economic demand. Demand for goods via e-commerce requires open space near population centers and that's in our favor; the opening of the Panama Canal helps.

# PLANNING HORIZON

## ASSUMPTIONS ABOUT THE FUTURE

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### LEGISLATION & REGULATION

1. Political uncertainty stemming from global issues (i.e. Brexit, Syrian Civil War, ISIS etc.) will continue to take the forefront of domestic politics.
2. Increased regulation may continue to impact commercial real estate.
3. Increased difficulty obtaining capital without considerable equity.
4. The commercial real estate industry may be facing a scenario regarding banking regulations that went into effect at the beginning of 2016. These impose increased capital requirements on banks for acquisition, development and construction (“ADC”) loans for commercial real estate projects. The new requirements could increase the cost of capital, or decrease its availability, for commercial real estate construction loans.
5. The future of the EB-5 foreign investment visa program, real estate investment trust spinoffs and conversions, and commercial MBS risk retention rules are among the areas of real estate legislation and regulation lawyers will be watching in the second half of 2018.
6. Lawyers are also carefully monitoring developments with Basel III high-volatility commercial real estate loans to ensure that those loans – which require keeping more capital on hand than traditional loans do – stay off the books.
7. CMBS, the mortgage liquidity vehicle for middle-market properties in secondary locations, could either evaporate or change dramatically because of new rules. The big bogeyman for the market is the pending risk retention rule that goes into effect in December 2018. The rule is incorporated as part of the Dodd-Frank Wall Street Reform and Consumer Protection Act. Risk retention requires that the issuer of a CMBS deal either keep a slice equal to 5 percent of that deal's market value for at least five years, or designate a B-piece buyer to take on that risk. That means the entity that takes the 5% will be buying bonds up to those rated BBB, or even higher. B-piece buyers currently buy bonds up to those rated BBB. The expectation is that the yields from those bonds would have to, at the very least, climb to compensate investors for their inability to trade out of their B-pieces. That means loan prices would, as a necessity, increase.
8. Regulation AB II, which went into effect late last year, is expected to shrink the universe of active lenders in the CMBS business. However, many see that as a positive development; too many lenders competing for business tends to lead to aggressive underwriting.
9. If that weren't enough, bank regulators are putting together new capital requirements for banks that trade securities that, if implemented today, would make trading CMBS completely uneconomical. Those rules are still at least two years away from being ironed out, so their ultimate impact might not be as severe as feared. Meanwhile, CMBS prices remain weak and few expect they'll recover anytime soon. That too should result in a further thinning of conduit lenders.
10. Industry players often refer to previous years to gauge what stage of the business cycle the sector is in at a given point. 2006 is typically bandied about since this was the market's last gasp before the large downturn. Some are now referring to 1991, when the savings and loan crisis caused tremendous uncertainty. New regulations will change the complexion of the market come this time next year, but the uncertainty regarding the intensity of that change is weighing on the minds of market players.

# SWOT ANALYSIS

## SUMMARY OF THE MOST IMPORTANT POINTS IN THE ENVIRONMENT

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An environmental scan is a process for documenting facts and trends in the operating environment of an organization that are likely to affect the organization in its future work. It includes a summary of internal information about the organization and its history consisting of: past achievements and results, its current structure, and financial data. It is often outlined as a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.

### STRENGTHS

1. Committed, talented and enthusiastic members and Board of Directors, Previous Board Members and Presidents who are involved
2. Board of Directors has a cohesive vision, working towards a common goal
3. Awareness of areas in need of improvement (i.e., branding, committee development, communicating value of membership)
4. Fiscally stable
5. Hosts quality programs
6. Access to educational resources and conventions from Crew Network: Webinars, Playbooks, Leadership Development
7. National networking abilities and access to CREWBiz membership list
8. Ability for members to become a sponsor, which will help them gain maximum exposure for a minimal cost

### WEAKNESSES

1. Internal qualities that need to be improved
2. Consistent tracking of what's working and not working. Need measured outcomes and measures of success
3. Existing board is tactical in nature and lacking strategic focus, and, therefore lends itself to short-term views
4. Lack in succession planning and training of future leaders
5. Image/branding – there is a perception within the local community that there is limited value in membership and men are not welcome
6. Lack of marketing materials to hand out to prospects/ members at events
7. Lack of awareness of the CREW national networking resources
8. Lack of diversified members and senior level members
9. Lack of engaged committee members
10. Lack of personal outreach to invite the highest level of women in the business and make it worth their membership

### OPPORTUNITIES

1. Market is rich with prospective members, especially in the West LA market
2. Collaboration potential with other commercial real estate and business groups, that align with CREW-LA's mission and goals
3. Develop a stronger Internet/Social Media presence, twitter, LinkedIn, Facebook, and calendar of events
4. Budget for creation of sponsor appreciation boards, media loop of images, and printing of marketing materials
5. Continued development of a social media strategy and website updates
6. Committee growth by engaging new members from the membership inception.

### THREATS

1. Meeting Location/Traffic – distance to travel to meetings and programs across the various submarkets of Greater LA (constraints placed on them by work deadlines)
2. Lack of visibility in commercial real estate community (market presence)
3. Increased demands on younger workforce (implication: fewer active members and committee members due to time
4. Members dropping out due to lack of business leads/ referrals/business development
5. Other organizations are forming professional real estate women groups

# GOAL 1

## VALUE AND BENEFIT OF MEMBERSHIP

Members recognize and articulate proudly and passionately the value of their participation and involvement in CREW-LA

### 1.1 CREATE AN ENVIRONMENT WHERE MEMBERS NETWORK AND CREATE PROFESSIONAL RELATIONSHIPS, LEADING TO BUSINESS REFERRALS AND RESOURCES.

Strategy	Action Items	Committee / Board Member Responsible
1.1.1 Encourage committee service and leadership to foster developing relationships with other members	<ul style="list-style-type: none"> <li>New members required to be part of a committee for the first year of membership</li> <li>Terms for existing board members to allow other members to lead [i.e. minimum of 2 years, 7 year max terms, etc.]</li> </ul>	Membership Recruitment, Board of Directors
1.1.2 Host monthly members-only programs focused on networking and professional development	<ul style="list-style-type: none"> <li>Continually host member-only events</li> <li>Relevant topics</li> <li>Dine with a legend</li> <li>Inquire about member-only events in annual survey</li> </ul>	Programs, Membership Retention
1.1.3 Have at least one program each year highlighting the successes of women in the real estate industry	<ul style="list-style-type: none"> <li>Submit CREW-LA members to LABJ, Women in Business and Real Estate Awards (free PR for the person nominated)</li> <li>1-2 programs/year that features a CREW-LA member</li> <li>Newsletter highlights achievements of members</li> <li>Large awards ceremony every 3-5 years to honor Sr. Women in the industry and/or team up with OC Chapter for their annual awards event (they cover SoCal in their recognition)</li> </ul>	Board of Directors, Programs, Communications
1.1.4 Develop metrics showing successful results and incomes. Member retention, membership growth, attendance at events	<ul style="list-style-type: none"> <li>Create annual report to members in March of each year: positive highlights of retention rates, membership growth, membership survey, and highest attended programs.</li> </ul>	President, Board of Directors

Year	Count	Previous	New	Inactive	Retention	Growth
2010	90		24	15		
2011	93	90	20	12	81.11%	3.33%
2012	105	93	35	23	75.27%	12.90%
2013	96	105	20	31	72.38%	-8.57%
2014	106	96	34	31	75%	10.42%
2015	99	106	33	45	62.26%	-6.60%
2016	95	99	28	38	67.68%	-4.04%

1.1.5 Implement a policy on charging members vs. non-members. Make the spread between members and non-members significant enough to offer value to the member. Significant amount of non-members attend events more than members	<ul style="list-style-type: none"> <li>Board to determine for each event what the spread is, range \$20 - \$30 +/-</li> <li>Survey for non-members attending multiple events to ask why they haven't become a member, what interests them in CREW, what's stopping them from becoming a member</li> </ul>	Board of Directors, Programs, Membership Recruitment
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# GOAL 1

## VALUE AND BENEFIT OF MEMBERSHIP

Members recognize and articulate proudly and passionately the value of their participation and involvement in CREW-LA

### 1.2 OBJECTIVE: ASSURE ALIGNMENT OF PROGRAMS AND EVENTS WITH THE STRATEGIC PLAN, SO THAT THEY FACILITATE ATTAINING ALL THREE OBJECTIVES IN GOAL #1

Strategy	Action Items	Committee / Board Member Responsible
1.2.1 Evaluate whether programs or services adds membership value. Assess whether programs and members-only events promote industry education and expertise, a supportive environment for networking, relationship building leading to business referrals and resources, and leadership development	<ul style="list-style-type: none"> <li>Evaluate a program/event at Board meeting immediately following the event</li> <li>Annually evaluate program quantity, topics, quality with member survey</li> <li>Participant survey at the end of each event – quick 2 minute. Send committee member around the room to collect feedback</li> <li>Offer CEU programs (appraisers, brokerage, architecture, lawyers, title, escrow). Ask members in survey if they want CEU's and what category</li> </ul>	Programs, Membership, Communications
1.2.2 Ensure co-hosted/co-branded events are equally shared in costs and responsibilities with the organizations involved	<ul style="list-style-type: none"> <li>Committee to submit information to Board for review and approval. Provide final budget and oversee the branding is represented correctly in flyer</li> </ul>	Programs
1.2.3 Create a “phone/email tree” contact list, that the Board and committees call the same people each month about attendance at programs. Similar to the “phone tree” created during member renewals season	<ul style="list-style-type: none"> <li>Periodically call assigned people to encourage them to attend the next event. Great opportunity to build rapport with that member and ask for feedback about what's working or not from the member</li> </ul>	Communications, Programs

### 1.3 OBJECTIVE: COMMUNICATE VALUE OF MEMBERSHIP TO MEMBERS AND POTENTIAL MEMBERS

Strategy	Action Items	Committee / Board Member Responsible
1.3.1 Communicate member networking successes via the newsletter, website and social media	<ul style="list-style-type: none"> <li>Send out monthly newsletter with success stories, CREW referrals, deals they have done, project wins, etc.</li> <li>Encourage members to submit their info or others' info to highlight success stories</li> <li>Update website monthly with info</li> <li>Update social media weekly with updates</li> <li>Evaluate frequency of communications to members</li> </ul>	Programs, Membership, Communications
1.3.2 Improve social media - to be user friendly and attractive, and the primary source of information on CREW-LA with weekly updates if applicable. Posting deals/transactions, open job postings and announcements from sponsors	<ul style="list-style-type: none"> <li>Continually update website with current info</li> <li>Live Twitter feed on our website (CREW-LA and CREW Network)</li> <li>Use Facebook and LinkedIn</li> <li>Create social media strategy for future Board/Committee members to follow</li> </ul>	Programs
1.3.3. Highlight new members in monthly newsletter	<ul style="list-style-type: none"> <li>After new members are approved, highlight them in the newsletter</li> </ul>	Communications, Programs

# GOAL 2

## MEMBERSHIP GROWTH AND DEVELOPMENT

Increase membership base and diversity

### 2.1 OBJECTIVE: CREATE A CULTURE THAT ENCOURAGES PEOPLE TO JOIN AND RENEW

Strategy	Action Items	Committee / Board Member Responsible
<p>2.1.1 Form a welcome committee. Consider having at least two (2) people per event, one to sit at the new members table and once to circulate the room. Distribute the attendee list before the event that identify non-members, what they do and who they work for</p>	<ul style="list-style-type: none"><li>• Form a welcome committee</li><li>• Distribute the attendee list to Board of Directors before the event to identify non-members</li></ul>	Communications
<p>2.1.2 New members must attend one CREW-LA event to be eligible</p>	<ul style="list-style-type: none"><li>• Verify their attendance</li></ul>	Communications
<p>2.1.3 “Each one, Reach one” during the first 6 months of the year. Place emphasis on new members to invite a co-worker or to suggest a potential prospect for membership</p>	<ul style="list-style-type: none"><li>• Flyer to encourage members to invite co-workers or suggest a potential prospect for membership</li><li>• Highlight new members each month in the newsletter</li></ul>	Programs, Membership Recruitment, Communications
<p>2.1.4 Attract and retain prominent women (“real estate rock stars”) by: (1) acknowledging and announcing them at programs; (2) acknowledging their achievements in newsletters and on website; and (3) provide opportunities for mentorship. (4) Consider better roles for Sr. Women in CREW-LA when they apply. Ask them what they need from the organization? What could we do better? (5) Include in Advisory Board, mentoring events, highlight at Dine arounds. Streamline membership app process and not assign them to committee duties</p>	<ul style="list-style-type: none"><li>• Board to identify prominent women and have a target list</li><li>• Ask members who they think are prominent female RE rock stars</li><li>• Acknowledging and announcing them at programs</li><li>• Acknowledging their achievements in newsletters and on website</li><li>• Provide opportunities for mentorshi</li><li>• Consider better roles for Sr. Women in CREW-LA when they apply. Ask them what they need from the organization? What could we do better?</li><li>• Include in Advisory Board, mentoring events, highlight at Dine around</li><li>• Streamline membership app process and limit committee duties</li></ul>	Board, Membership Retention, President/Programs, Communication
<p>2.1.5 Establish PR budget for appropriate marketing materials, to be more effective in our communication. Provide funds for sponsor recognition poster boards for events and printed marketing materials to hand out at events</p>	<ul style="list-style-type: none"><li>• Committee to propose budget and submit to Board</li><li>• Create posters to thank Sponsors</li><li>• Create marketing materials for sponsorship, membership recruitment, programs, etc.</li></ul>	Communications, Sponsorship, Membership, Programs

## GOAL 2

### MEMBERSHIP GROWTH AND DEVELOPMENT

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Increase membership base and diversity

#### 2.1 OBJECTIVE: CREATE A CULTURE THAT ENCOURAGES PEOPLE TO JOIN AND RENEW

Strategy	Action Items	Committee / Board Member Responsible
2.1.7 Promote national CREW Network mentorship program. Host local mentoring events to give back to members “Speed Mentoring” Acknowledge “mentors” at events, in the newsletter and on the website/social media	<ul style="list-style-type: none"><li>• Promote CREW Network’s formal mentorship program, in our newsletter, social media, and at the podium at events</li><li>• Host local mentoring events to give back to members “Speed Mentoring”</li></ul>	President and Delegates, Programs
2.1.8 Create/Update “value of membership” brochure to hand out at all events	<ul style="list-style-type: none"><li>• Create value of membership brochure/flyer (CREW Network provided template)</li><li>• Highlight local, regional and national benefits of joining “giving/getting referrals, business development, leadership opportunities, connecting RE players and making valuable introductions, personal and professional growth, insight into other RE specialties, access to CREW’s 9,500 int’l network, specialty events”. Include quotes from members in the newsletter, that highlight what value they see in the membership.</li></ul>	Membership Recruitment, President

# GOAL 2

## MEMBERSHIP GROWTH AND DEVELOPMENT

Increase membership base and diversity

**2.2 OBJECTIVE: INCREASE MEMBERSHIP TO 150+ MEMBERS IN ALL FACETS OF THE COMMERCIAL REAL ESTATE INDUSTRY WITH CONCENTRATION ON THE BROKERAGE COMMUNITY OR AREAS OF COMMERCIAL REAL ESTATE THAT GENERATE NEW DEALS AND MORE OPPORTUNITIES FOR MEMBERS TO DO BUSINESS AND GET REFERRALS**

Strategy	Action Items	Committee / Board Member Responsible
2.2.1 CREW-Network needs to update their CRM platform, before we can update and reconcile our contacts list.	<ul style="list-style-type: none"><li>Update member and non-member contact info monthly</li></ul>	CREW Administration
2.2.2 Membership committee to contact and recruit all guest/non-member attendees of programs. Follow up call with non-member to see what they enjoyed about the event, how did they hear about it, would they consider joining CREW-LA, and then invite them to the next event	<ul style="list-style-type: none"><li>Utilize roster from events to connect with non-members after each event. Encourage them to apply for membership</li></ul>	Membership
2.2.3 Create a target list of real estate "rock stars" and strategic member prospects, including journalists and PR	<ul style="list-style-type: none"><li>Create a target list to go after Sr. women</li></ul>	Board of Directors
2.2.4 Target strategic alliances and partner more effectively with other organizations including, but not limited to LA County Bar, BOMA, CCIM, IREM, ULI, NAIOP, SIOR, Westside Urban Forum, etc.	<ul style="list-style-type: none"><li>Connect with other organizations that align with our core values and share in responsibilities and costs</li></ul>	Programs
2.2.5 Establish committee (3-4 people) for student outreach, at local SoCal Universities (USC and UCLA real estate students). Update website with current college info, co-branded events, scholarships, etc.	<ul style="list-style-type: none"><li>Go to campuses and recruit Real Estate students, talk to their student groups, attend events, etc.</li></ul>	Special Student outreach committee
2.2.6 Review membership attendance at specific programs to establish what was most effective. Interview past presidents, board members and committee chairs to see what was successful in recruiting and retaining members	<ul style="list-style-type: none"><li>Review attendance of each Program and report to the Board which ones were highly attended, which received positive feedback, how many members vs. non-members attended</li></ul>	Programs
2.2.7 Annual Survey Monkey to all members for feedback on programs, value of membership, preferences, etc. Create incentive for members to respond to survey	<ul style="list-style-type: none"><li>Create questionnaire for members only. CREW Admin to email Survey Monkey out to Members</li></ul>	Membership Retention and CREW Admin

# GOAL 3

## BOARD AND COMMITTEE

Strategic board with tactical/active committees that implement the goals set by the Board

### 3.1 OBJECTIVE: BOARD DIRECTORS TO BE COMMITTEE LIAISON TO THE COMMITTEE CHAIRS

Strategy	Action Items	Committee / Board Member Responsible
3.1.1 Identify comparable CREW chapters and other non-profits and review role of board members, structure of organization and interaction between board and committee chairs. Share best practices amongst board members of other SoCal CREW Chapters	<ul style="list-style-type: none"><li>Identify and review comparable CREW Chapters to establish where we can learn and grow. Share best practices with Board</li></ul>	President, Immediate Past President, President Elect and Delegates,
3.1.2 Directors will focus on strategies for implementation of the board's goals, as well as, the strategic plan. Taking into account the recommendations and guidance of the strategic planning committee, then direct committees accordingly	<ul style="list-style-type: none"><li>Utilize by-laws, playbooks, and due dates to set goals/ strategies at the beginning of the year</li><li>Check in point at the June Board meeting to share if we are on track or not</li></ul>	Board of Directors
3.1.3 Succession planning – always mentor and coach committee members to roll into Committee Chair and Board positions	<ul style="list-style-type: none"><li>Meet quarterly, or as needed, to discuss active chapter members to recruit for Board, Chair and Committees roles</li><li>Determine engaged committee members to groom for Board positions starting in July</li><li>Determine succession for future Presidency</li></ul>	President, Immediate Past President and President Elect
3.1.4 Growth of committees. Promote committee leadership to Chair position, with the goal in mind that they will be a future Board Member	<ul style="list-style-type: none"><li>Establish which committee members are going to be considered for future Chair and Board positions</li><li>Ensure they are being mentored and trained by current Board Member and are looped into planning and goal setting</li></ul>	Board of Directors and President
3.1.5 Personal growth of Board and Committee members. CREW-LA is a leadership lab environment and continuous learning is very valuable. Board members to look for ways to continue their education and learning about leadership. Consider programs or speakers that can teach the board members and committee chairs these skills, for added membership value	<ul style="list-style-type: none"><li>Host one event that caters to the Board and Committees that focuses on being a better leader and/or leadership skills</li><li>Highlight perks of being a volunteer in these roles</li></ul>	President and Board

# GOAL 3

## BOARD AND COMMITTEE

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Strategic board with tactical/active committees that implement the goals set by the Board

### 3.2 OBJECTIVE: FOLLOW STRATEGIC AND NEUTRAL PROCESS FOR SELECTING BOARD MEMBERS AS SET FORTH IN THE BY-LAWS.

Strategy	Action Items	Committee / Board Member Responsible
3.2.1 For new board members, consider and confirm such factors as professional experience, length of time in the chapter, prior involvement and leadership in chapter committees, experience on other boards, skill set, strategic alliances and temperament of prospective board member	<ul style="list-style-type: none"><li>• Nominating Committee to determine candidates for Board of Directors and nominate them</li></ul>	President, Immediate Past President and President Elect
3.2.2 Consider make-up of nominating committee and impact on the future diversity of the Board. It shall not be self-serving	<ul style="list-style-type: none"><li>• Nominating Committee should have a list prospective candidates for Board positions and Committee Chairs</li><li>• Reach out to existing Board members in good standing for recommendations</li></ul>	President, Immediate Past President, and President Elect.
3.2.3 Follow the by-laws for the nominating committee. It should consist of, at a minimum, the President, President Elect and Past President	<ul style="list-style-type: none"><li>• There is an opportunity to include past Presidents on the Nominating Committee, or general counsel</li></ul>	President, Immediate Past President and President Elect
3.2.4 President Elect to have a major role in the selection of board members for the year in which she/he serves as president	<ul style="list-style-type: none"><li>• President Elect should be doing the formal invitation to current Board Members to renew, New and Potential Board Members to take on the roles</li><li>• President and Immediate Past President can assist with informal/soft asks to see if someone is interested in taking on more responsibility</li></ul>	President Elect, President and Immediate Past President

# GOAL 3

## BOARD AND COMMITTEE

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Strategic board with tactical/active committees that implement the goals set by the Board

### 3.3 OBJECTIVE: BOARD DIRECTORS SHOULD BE ALIGNED WITH PRIMARY STRATEGIC GOALS AND OVERALL STRATEGIC PLAN

Strategy	Action Items	Committee / Board Member Responsible
3.3.1 Each board member to have one vote (i.e. no sharing of votes among board members)	<ul style="list-style-type: none"><li>• By-laws will further define and confirm what makes up quorum</li></ul>	President and Board
3.3.2 Board Members to align their goals with CREW Network and CREW-LA. Including the playbooks, strategic plan, by-laws, etc.	<ul style="list-style-type: none"><li>• Outgoing President to work with the incoming President and Board to establish goals for the next year that will further the CREW-LA Mission</li><li>• All Board Members and Committee members to read Playbooks</li><li>• Board members to review CREW Network's goals</li></ul>	President, President Elect and Board Members
3.3.3 Annual Board retreat to review where the chapter is, establish which goals have been successful and which need improvement, review strategic plan, the overall direction of the chapter and what are the priorities are going forward	<ul style="list-style-type: none"><li>• Establish time, date, and location</li><li>• Present goals and strategies</li></ul>	President, Board of Directors
3.3.4 Assign a Strategic Plan Champion to head the strategic planning committee and champion the Board's efforts to stay on track and align with our goals	<ul style="list-style-type: none"><li>• Ensure Board is following suggested guidelines in strategic plan, oversee implementation and revisions</li></ul>	Secretary

# GOAL 3

## BOARD AND COMMITTEE

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Strategic board with tactical/active committees that implement the goals set by the Board

### 3.4 OBJECTIVE: ESTABLISH PROCESS FOR SELECTING COMMITTEE MEMBERS

Strategy	Action Items	Committee / Board Member Responsible
3.4.1 Board Member and Nominating Committee (President, President Elect and Immediate Past President) to appoint committee chairs and committee members	<ul style="list-style-type: none"><li>• New committee member outreach, appoint Chairs and notify CREW Admin to track all committee members</li></ul>	Board of Directors, CREW Admin
3.4.2 Consider criteria for selection of committee members, with such factors as the following: professional experience, length of time in the chapter, prior involvement and leadership in chapter committees, experience on other boards, skill set, strategic alliances, and temperament of prospective committee members	<ul style="list-style-type: none"><li>• Meet with potential committee members over coffee, or via conf call, to get to know them better and ascertain their engagement and commitment to CREW-LA</li></ul>	Board of Directors, Nominating Committee
3.4.3 Committee members will consist of a blend of highly experienced real estate professionals, including past Chapter presidents and national delegates and “real estate rock stars”, and young new members who will bring fresh and innovative ideas	<ul style="list-style-type: none"><li>• Compile a list of potential committee members</li><li>• Reach out to members and Past-Presidents to re-engage them</li></ul>	Board of Directors, President
3.4.4 Update organizational chart for committee’s members	<ul style="list-style-type: none"><li>• Update committee members chart monthly</li></ul>	CREW Admin, Board of Directors

# GOAL 3

## BOARD AND COMMITTEE

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Strategic board with tactical/active committees that implement the goals set by the board

### 3.5 OBJECTIVE: PROCEDURES FOR IMPLEMENTATION AND MEASURING SUCCESS OF GOALS SET

Strategy	Action Items	Committee / Board Member Responsible
3.5.1 Committees should re-evaluate their goals and action plans mid-year to establish they are on course or need to change direction	<ul style="list-style-type: none"><li>Review target goals and revise for remainder of the year</li></ul>	Board and Committee Chair
3.5.2 Membership survey results to be reviewed Q3 and report findings to the Board. Is the Chapter on course or need to make adjustments to match member feedback? How can the board address these deficiencies?	<ul style="list-style-type: none"><li>Membership Committee to review the feedback from Member survey and report to the Board</li><li>Compare previous years' member survey results to see how we have improved</li></ul>	Membership
3.5.3 Review and align with chapter deadlines and due dates, separate spreadsheet	<ul style="list-style-type: none"><li>Distribute Chapter due dates and deadlines to all Board and Committee Members</li></ul>	President
3.5.4 Annual report out in Q1-Q2 with a high level view of membership diversification, sponsorship, budget, programs, dine around attendance, etc. for the CREW-LA membership only	<ul style="list-style-type: none"><li>Email annual report to Members, highlighting key events and growth</li></ul>	President, CREW Admin and Board Members

# GOAL 3

## BOARD AND COMMITTEE

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Strategic board with tactical/active committees that implement the goals set by the Board

### 3.6 OBJECTIVE: BEING A STRATEGIC BOARD VS. WORKING BOARD. MAINTAIN FOCUS OF COMMITTEES, TO SHIFT THE CHAPTER'S ACTIVITIES FROM THE BOARD LEVEL TO THE COMMITTEE LEVEL

Strategy	Action Items	Committee / Board Member Responsible
3.6.1 Committees should be led by a Committee Chair who is a prospective board member, not an actual Board member. Committee Chair reports to the Board Director. Board Director is then the liaison to the President. The Board Director will select the Committee Chair	<ul style="list-style-type: none"><li>Board member to select and confirm Committee Chair. Notify CREW Admin for tracking purposes</li></ul>	Board of Directors
3.6.2 Board will revise the scope and duties of the Committee Chair and Committee members on an annual basis	<ul style="list-style-type: none"><li>Revise roles and duties as needed</li></ul>	President and Board Members
3.6.3 Committee size should be based on the priority given to the work that committee is engaged in	<ul style="list-style-type: none"><li>Constant monitoring of committees and discuss at Board meeting</li></ul>	Board Member
3.6.4 Committee Chair and Board Director will organize regular committee meetings (no less than 1 per month)	<ul style="list-style-type: none"><li>Board member and Chair to host committee meeting monthly, in person or conference call</li><li>Prepare monthly reports board meeting</li><li>Report regularly to the Board and President on progress</li></ul>	Board Member, Committee Chair
3.6.5 All committee members to help with membership outreach, so we continue to attract a wide array of members and boost the size of the committees	<ul style="list-style-type: none"><li>No-Host happy hours to attract new members</li></ul>	Membership Director and Committee

# GOAL 3

## BOARD AND COMMITTEE

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Strategic board with tactical/active committees that implement the goals set by the Board

### 3.7 OBJECTIVE: REFERENCE NEWLY AMENDED BY-LAWS TO DETERMINE STRUCTURE AND GOALS.

Strategy	Action Items	Committee / Board Member Responsible
3.7.1 It is highly recommended that the President and Board have consistent written policies and procedures that follow the existing by-laws, rather than rewrite the by-laws	<ul style="list-style-type: none"><li>Periodically review policies and procedures and make necessary recommendations, but do not change the by-laws for legal reasons</li></ul>	President and Secretary
3.7.2 The by-laws are akin to the "constitution" as to board governance rules and procedures and must be adhered to, to preserve the corporate shield and other protections afforded to the organization under applicable laws		President and Secretary
3.7.3 Board members are highly encouraged to attend all CREW Network leadership summits (2x's/year and conferences (1x/year). The Board and committees shall try and raise sponsorship dollars to help subsidize the cost for all Board members to attend	<ul style="list-style-type: none"><li>Hold fundraiser to raise dollars to help subsidize costs for Board members to attend Convention</li><li>Give new Board members an opportunity to attend Convention first or Board members that would otherwise have to pay out of pocket to attend</li></ul>	President and Board of Directors