



**CCIM Institute  
Chapter Officer Training**

**Showtime!**

**Nashville, TN July 17 – 19, 2022**

**Outline Guide**

**(For a complete Resource – Refer to the Chapter Resources Manual in the COT Playbook at [ccim.com/COT](https://ccim.com/COT))**

**I. Leadership**

**A. Primary Functions of Chapter President** – Plan, Recruit, Delegate, Motivate, Promote, Succession

Planning

**B. Officers** - Pick your team in July, Installation in November

**C. Committees** – Pick your team in November, have them in place January 1<sup>st</sup>

1. Make a contact chart, contact list
2. Committee Chairs – They should recruit their team by the end of December.

**D. Delegating and Follow Through**

1. Make sure everyone knows their job and follow-up
  - a. Have clear objectives for everyone and a plan for implementing them
  - b. Schedule your calendar, even if final dates are TBD – Do this in early January with your Board
2. Build a team – Recruit
  - a. Get the new Designees and Candidates involved
  - b. Get younger members involved, they're your Chapter's future
  - c. See who is taking CI courses and get them involved in the Chapter

**E. Motivating and Promoting**

1. Inspire a shared vision

2. Challenge the process
3. Foster collaboration
4. Set the example
5. Recognize contributions
6. Celebrate the values and victories
7. Be an ambassador of CCIM Institute

**F. Succession Planning**

1. Create a standard process for rising through the ranks – progression through the committee chairs, officers
2. Involve your VP, make decisions together
3. Your VP and Treasurer should be the next two Chapter Presidents. Have them attend COT
4. The next two Chapter Presidents need important roles in the Chapter
5. Ideally, anyone on the Board not interested in moving up, moves down – This helps create positions and opportunities for future leaders

**G. Finances of the Chapter**

1. Take Charge of your Chapter's finances
2. Prepare a budget in December and approve it in January (year by year comparison is most helpful)
3. Who does your Chapter's books – create a close relationship with this person
4. Have your Treasurer take charge. Review the financial statements and budget with them, to be approved by your Board each month
5. Make sure you file a tax return

**H. Past Presidents – How to use them**

1. Schedule an annual or quarterly Past Presidents luncheon

2. Have them help with recruiting, sponsors, mentorship
3. Give them plenty of recognition, including in the media
4. Past President's Committee (in larger chapters consider having a combined 1 seat on the Board)

**I. Hiring and working with a Chapter Administrator**

1. Work closely with your admin, communication is key
2. Make them an integral part of the team
3. Acknowledge accomplishments with public praise
4. How to find one for your Chapter - check with other chapters or industry organizations
5. Have a prepared Standard Services Statement (job description)
6. Use Standard Independent Contractor contract with a specific list of duties
7. Manage, not micromanage
8. Have him/her attend Admin Training at COT

**J. Board of Directors – It's more than just a title**

1. They can help with recruiting, promotion, obtaining sponsors, planning events, plan and participate in mentorship program
2. They need to approve the Chapter's events calendar, budget, changes to bylaws etc.
3. Hold monthly BoD meetings – utilize Roberts Rules

**K. Strategic Planning**

1. Hold a strategic planning meeting in December
2. Use a simple strategic plan format, make it your own
3. Review prior year's chapter mission and vision statement, make it your own

## **II. Membership**

**A. Growth through inclusion and diversity**

1. Look around and reach out
2. CCIM is an inclusive organization that values diversity

**B. Simple Invitations** – Sometimes that's all it takes

1. Talk to national brokerage companies
2. Utilize Board Members and Past Presidents as recruiters
3. Encourage Board and Chapter Members to bring a guest every month to your Chapter Lunch and Learns – provide incentives besides a free lunch (e.g. gift cards to the Member inviting a guest who becomes a Member)

**C. Adding value along the way**

1. Give Recognition
  - a. Share Member to Member Deals at monthly meetings
  - b. Utilize press releases and social media often

**D. Marketing** – using Institute branded materials

1. Website – Who maintains it? Is it up-to-date?
2. Have a current Chapter Directory
3. Newsletter – It takes your Chapter from good to great
4. Communicate regularly and directly with Board Members and Chapter Members
5. Get Board Members to chip in with articles in local business publications
6. Utilize social media, encourage Chapter Members to do the same
7. Maintain an extensive market contact database for marketing Chapter events beyond current membership
8. Have an updated media contact list for press releases
9. Utilize Fonteva and Canva – CCIM Website

**E. Mentorship program** – It helps grow your Chapter

1. Create or maintain a mentorship program
2. Have special events specifically for mentors and mentees
3. Utilize Past Presidents, Designees, and Board Members

**F. University Outreach**

1. Provide menu of options to university students
2. Offer student memberships – deep discount
3. Plan events to include university students
4. Plan to make contact with university staff annually
5. Understand the CCIM Institute Program – University Partners

**G. Membership Lists**

1. Keep them updated
2. Communicate with past members

**III. Sponsorship – They Keep Us Going**

**A. Providing value along the way**

**B. Ads and Communication – keep them coming**

**C. Sponsor Spotlights**

1. Include one or two at every Chapter breakfast or luncheon
2. Encourage sponsors to participate

**D. Packages**

1. Annual vs Events based (Consider utilizing both)
2. Include memberships with annual sponsorships as a benefit
3. Avoid exclusives – This is an inclusive organization and is a key to growth
4. Use calendar year on annual sponsorships

## **IV. Events – The Key to A Chapter’s Success**

### **A. Signature Events**

1. Hybrid – It’s probably here to stay, especially in large geographical areas
2. Co-planning with other organizations (e.g. NAIOP, IREM, ULI, CREW)
3. Put a committee together early (start in December), delegate, follow-through
4. Build a tradition

### **B. Monthly Breakfasts or Luncheons**

1. Panelists – More than one panelist makes them more interesting
2. Topics:
  - a. Developer panels by market sector
  - b. Municipalities – City officials
  - c. Transportation and Economic Development councils
  - d. Industry Experts
  - e. Top broker Panels
3. Put committee together to assist
4. Other
  - a. Introduce guests in attendance
  - b. Announce Member to Member deals to show value
  - c. Include Sponsor Spotlights
  - d. Announce upcoming events
  - e. Utilize PowerPoint
  - f. Promote new Designees
  - g. Invite university students

### **C. Networking Events**

1. Invite non-members
2. Involve other organizations (e.g. NAIOP, IREM, Bar Assn, CREW)
3. Plan them around CI Courses to introduce new students to your Chapter
4. Plan them for your mentorship program
5. Plan them for new Designees
6. Make them fun

**D. Charitable Events** – you can combine them with your regular events

## **V. Education – It’s What We’re About**

**A. CI Courses** – How to make money at them

1. Holding CI Courses is your Chapter’s highest purpose
2. Having CI Classes produces your Chapter’s future leaders

**B. Scholarships**

1. Endowment scholarships – CCIM Foundation
  - a. Start one
  - b. Maybe this is your Chapter’s charity
2. Special scholarships – consider having them tied to a Chapter held CI Course
3. Award them to up and coming Chapter Members who are working toward their Designation
4. Get the recipients to participate on Chapter Committees

**C. Foundations, Ward Center, STDB Courses – Don’t forget these**

**D. Continuing Education (CE)** – It’s a member benefit

- a. Schedule them before or after your monthly luncheon

**E. Candidate Guidance** – make it a priority

1. Hold a portfolio workshop
2. Track Candidates – promote
3. Letters of recommendation – appoint one Board Member (notify Institute who this person is)

## **VI. Institute Information**

- A. 2022, 2023 Events – see COT Playbook ([ccim.com/COT](http://ccim.com/COT))**
- B. Institute leadership update – see COT Playbook**
- C. Meet the staff – see COT Playbook**
- D. Chapter Resources Page update**
- E. Attend Spring and Fall CCIM Conferences, include your V.P.**
- F. Promote Past Presidents to volunteer on Institute committees**