



2020 Strategic Plan

Executive Summary

Southern California Chapter of
CoreNet Global

v1.0

Ratified by Board of Directors on March 3, 2020

Connect

Learn

Grow

Belong

Letter From Leadership

Dear Members of the Southern California Chapter of CoreNet Global,

Our Chapter has a strong legacy in the Southern California market, extending from Los Angeles, to Inland Empire, Orange County, and San Diego. We connect around the profession of corporate real estate and the importance of the workplace in our diverse and dynamic market. Our success relies on the passion and commitment of volunteer members who serve on committees and lead the Chapter. Through this commitment, our Chapter has become the premier network of professionals who serve, educate, and celebrate corporate real estate in Southern California. This is a legacy and spirit of which we are proud.

As we look ahead, we have great opportunity to build on that legacy and spirit. To meet the needs of our members and achieve even greater heights, it is essential that we build on that legacy and anticipate the future needs of our profession. Over the past year, the Board evaluated our Chapter's current state, defined a new vision, created forward-thinking governing documents, and, with this document, set forth a 4-year Strategic Plan that will position the Chapter to grow and thrive. In this Strategic Plan, we commit our energies to carry forth the four value statements of CoreNet Global – connect, learn, grow, and belong.

We thank our committee members for their input, as well as pro bono support from McKinsey, The NonProfit Center, and CBRE. We thank our sponsors for their continued support and confidence. Most of all, we thank our members for their passion for the corporate real estate profession and their genuine interest in the long-term growth of our Chapter.

This plan presents the Chapter's pathway forward and we look forward to you joining us!

Sincerely,



Alex M. Perry
Chair



Nina J. Desrocher
President



Todd Anderson
Vice President & 2020 President

Executive Summary

VISION

Companies and individuals consider CoreNet Global indispensable to the successful practice of corporate real estate (CRE) in Southern California.

MISSION

We are the premier network of professionals who serve, educate, and celebrate corporate real estate in Southern California.

STRATEGY

We serve as the platform and catalyst for our members to Connect, Learn, Grow, and Belong within the corporate real estate profession.

GUIDING PRINCIPLES

1. **EXECUTE:** Deliver programs of value; be transparent in operational management
2. **ENGAGE:** Unite members and connect sponsors
3. **COMMUNICATE:** Actively communicate our purpose and value
4. **RECOGNIZE:** Celebrate and appreciate our members, profession, and Chapter
5. **SHARE & SUPPORT:** Support those who need the resources of our Chapter the most
6. **ACCELERATE:** Accelerate value to our members and potential members

4-Year Strategic Plan Summary

Value	CONNECT:	LEARN:	GROW:	BELONG:
	Facilitate unique opportunities to connect members, promote sponsors, and cultivate relationships of value across our profession.	Increase professional competencies through topical educational opportunities and resources.	Create the forum to share, recognize, and reward best practices, contributions to, and innovation in the profession to enable personal growth.	Build a vibrant and diverse member-driven organization to be positioned as the organization of choice for corporate real estate.
KPIs	<ul style="list-style-type: none"> Grow Membership 5% annually Achieve and maintain a renewal rate of +72% annually; 75% in FY 2022 and 2023 	<ul style="list-style-type: none"> Increase number of credentialed members Increase participation in Learning events 	<ul style="list-style-type: none"> Increase # of credentialed members Achieve engagement of 80% in each of Fiscal Year 2022 and 2023 	<ul style="list-style-type: none"> Increase ratio of End Users from 25% to 30% Increase ratio of Young Leaders from 21% to 30% Rise to the top 5 of the Large/Mega Chapters; Grow to 450 1st Affiliate members
ANNUALLY	<ul style="list-style-type: none"> Host regional networking events (such as tours, demos, and socials) once per quarter (4 per year) Incorporate End User only components to at least 4 events per year Host at least 3 unique events for Young Leaders per year Host the annual Golf tournament 	<ul style="list-style-type: none"> Host an educational event (such as panels, expert speakers, etc.) once per quarter (4 per year) across geographies Grow the LevelUp brand; offer more (2 per year) discrete member training "modules" Host an annual signature learning event Conduct at least one joint event with a local university or college per year 	<ul style="list-style-type: none"> Host the REMmys as a signature event to recognize excellence in our profession, locally Host the annual Sponsor Recognition dinner 	<ul style="list-style-type: none"> Publish a 60-day rolling calendar Train in-coming Board members on governance, operations, and volunteer leadership Create a fiscally sound budget Develop a sponsorship strategy, pricing, and campaign plan Develop a membership campaign plan Conduct an Annual Membership Meeting
FY 2020	<ul style="list-style-type: none"> Create a Communications Strategy and Plan; execute 	<ul style="list-style-type: none"> Develop an annual signature educational event Build an Education Committee playbook to ensure consistency of and brand recognition for our educational events 	<ul style="list-style-type: none"> Create an applicant-based scholarship for a Young Leader and a Member in Transition Develop a Chapter mentorship program 	<ul style="list-style-type: none"> Expand policies to address financial authorities and investments Initiate Thankful Thursdays to recognize each other and our value to the profession
FY 2021	<ul style="list-style-type: none"> Create a new website 	<ul style="list-style-type: none"> Develop an outreach strategy to feature CoreNet Global to local (at least 1/region) colleges and universities 	<ul style="list-style-type: none"> Create a volunteer leadership training program to grow our leaders Create a committee recruitment and training strategy to activate membership 	<ul style="list-style-type: none"> Conduct a Chapter membership survey to reassess member needs and perceptions of value
FY 2022	<ul style="list-style-type: none"> Commence a networking breakfast series 		<ul style="list-style-type: none"> Apply for CoreNet Global Chapter of the Year award 	<ul style="list-style-type: none"> Conduct a financial audit Evaluate the Chapter's business model
FY 2023	<ul style="list-style-type: none"> Create a Chapter Member app 	<ul style="list-style-type: none"> Facilitate hosting CoreNet classes to enable continuing ed credentials to be achieved locally (in conjunction with CoreNet Summit West coast location) 		<ul style="list-style-type: none"> Create a new strategic plan