

NAIOP SAN FRANCISCO BAY AREA CHAPTER

STRATEGIC VISION & GOALS 2019-2021



- A trusted source and affiliation for real estate professionals
- An effective advocate for commercial real estate
- Financially sound for the future
- Diverse, well-connected, and effective industry leaders
- Fostering career development and providing education for all career stages

NAIOP

COMMERCIAL REAL ESTATE
DEVELOPMENT ASSOCIATION

SAN FRANCISCO BAY AREA CHAPTER



CHAPTER MISSION STATEMENT

The mission of the chapter is to support the San Francisco Bay Area commercial real estate industry by proactively providing superior educational programs and events, fostering networking opportunities, and influencing legislative policy.

CHAPTER STRATEGIC PLAN

The purpose of this plan is to facilitate a higher level of focus and organization for chapter leadership during the next three years by defining multi-year goals, outlining specific strategies for implementation and setting measurable milestones. This strategic plan serves as a road map for overall chapter direction and a tool for advancement of chapter membership and sponsorship.

A TRUSTED SOURCE & AFFILIATION FOR REAL ESTATE PROFESSIONALS

The strength of the NAIOP organization is the association of 19,000+ nationwide members, 700+ local members and the support of an enthusiastic corporate organization. NAIOP is committed to helping our members develop industry connections across North America and within their targeted markets, and providing critical resources to facilitate the success of their businesses. The role of the NAIOP San Francisco Bay Area Chapter is to serve our members as their primary real estate resource locally to advance their business goals. To this end, our Chapter goals are:

MEMBERSHIP/ENGAGEMENT:

- To increase membership (with a special focus on increasing membership in the East Bay) over the next three years as follows:
2019: 725+ members
2020: 750+ members
2021: 800+ members
- To maintain a membership composition of more than 50% principals, which is predominantly real estate owners, developers and investors
- To attract members early in their careers and promote industry events that further engage young professional
- To deliver value for members in all stages of their careers
- To focus on retaining current members by fostering connectivity and engagement, especially by strengthening onboarding procedures and creating volunteer opportunities

EVENTS:

- To hold approximately 40 high quality events of varying sizes per year with a strong focus on quality vs. quantity
- To engage in ongoing efforts to create fresh relevant content and unique national and regional programming topics presented by well-recognized, highly articulate experts and local leaders
- To offer a diverse program calendar including marquee events (e.g. Best of the Bay, Golf Tournament, Real Estate Challenge, Industrial Breakfast, Capital Markets, etc.), medium size events (e.g. Developing Leader events, Real Estate Insiders, etc.), and smaller sized targeted events (e.g. sponsor appreciation, networking happy hours, breakfast roundtables, member recruitment, etc.)
- To build increased attendance at events through ongoing outreach efforts by the board and committees to invite attendance by members and prospects
- To attract “best in industry” firms as sponsors and facilitate high value-added benefits from opportunities to host and/or participate in high profile event programs and recognition at all chapter events
- To provide good visibility to annual sponsors at the events through signage, recognition on the screen and from the podium, etc.
- To maintain strong communication and coordination among the board, committees, and NAIOP SFBA staff to maximize efficiency
- To host members-only events to promote the value of membership
- Reinforce membership value by aligning pricing of events to incentive membership

COMMUNICATIONS:

- To increase and improve internal and external communications with the help of a Marketing/ Communications Committee
- To maintain an effective, relevant, and technologically current website
- To drive traffic to the website and further develop the sense of community (e.g. online directory, job board) and encourage participation from members and sponsors
- To provide good visibility to sponsors on the website, in broadcast emails, and other relevant deliverables
- To generate concise content (photographs, recaps, etc.) that communicates the value of recent events and encourages future attendance (i.e. To create “FOMO”)
- To continually upgrade the collateral pieces for member and sponsor marketing
- To continually expand and improve the chapter mailing list, including additions by incoming board members
- To expand and explore relationships with media and social media platforms (LinkedIn, podcasts, etc.)
- To distinguish in communications that NAIOP is a trusted source



AN EFFECTIVE ADVOCATE FOR COMMERCIAL REAL ESTATE

As an industry-leading organization at the local, state, and national levels, it is the responsibility of the chapter's leadership to further the agenda of commercial real estate by actively working on legislative issues that affect the welfare of our members and our industry. The Chapter's goals are:

- To keep membership informed in a timely way of legislative issues that affect our industry
- To report back to the membership verbally or with a fact sheet at major events about the efforts and successes of the chapter's legislative advocacy efforts
- To monitor pending legislation (CBPA, in DC visits once a year, etc.)
- To collect input from members and sponsors
- To educate legislators about the statutes and regulations they are considering
- To poll key thought-leaders within the membership on critical issues in order to determine appropriate actions
- To encourage use of the letter-writing link on the website that will allow interaction between members and elected officials
- To join hands with BOMA on certain topics
- To work toward developing a policy platform for the LAC that is updated annually
- Through news feeds and other methods, to post regular updates on the website about national, state, and local legislative and regulatory matters
- To explore involvement with local governmental affairs efforts and/ or the possibility of hiring a legislative advocate specifically for the Chapter (a longer-term goal)

FINANCIALLY SOUND FOR THE FUTURE

In both good and challenging times, a stable capital structure ensures that our members will benefit from a consistently high level of service across all areas of their NAIOP membership. To this end, the Chapter's goals are:

- To annually budget for a net income
- To build a reserve fund of at least eight months operating expenses on the following schedule:
FYE 2019: \$500k
FYE 2020: \$525k
FYE 2021: \$550k
- To have in place an Audit/Finance Committee that meets at least annually to review financial operations and make recommendations for investments (when necessary), and ensure ongoing support for the Treasurer role.
- To further build the number of sponsors on the following schedule for gross income:
FYE 2019: 57 sponsors / \$328k
FYE 2020: 59 sponsors / \$338k
FYE 2021: 61 sponsors / \$348k
- To conservatively invest association reserve funds to earn interest (e.g. CD's) while maintaining liquidity

DIVERSE, WELL-CONNECTED, HIGHLY EFFECTIVE INDUSTRY LEADERS

The San Francisco Bay Area Chapter of NAIOP is a service organization dedicated to the advancement of our members and their businesses. This is accomplished most effectively through active, visible participation of a diverse and well-organized board that consists of top-level professionals from all corners of our industry. In addition, this can be achieved through industry recognition of the chapter and its members, as well as participation in industry alliances. To this end, the Chapter's goals are:

DIVERSITY:

VISION: An inclusive culture in NAIOP SFBA and the Bay Area CRE community that embraces diversity as both a core value and a driver for success.

MISSION: NAIOP SFBA believes that individuals and businesses achieve the best outcomes in environments that embrace a diversity of backgrounds, experiences, and viewpoints. The mission of NAIOP SFBA's Diversity Committee is to provide leadership, infrastructure, and a forum to share perspectives and best practices, in order to foster a culture of diversity and inclusion in all aspects of NAIOP SFBA's work and in our broader Bay Area CRE community.

- To maintain an established Diversity committee
- To ensure that diversity and inclusion are considered in all organization activities, actions, and decisions
- To develop and execute additional programs or resources for the Chapter where a need is identified
- To identify opportunities to work together with NAIOP Corporate or other Chapters or outside commercial real estate organizations who share similar goals
- To become the most diverse Chapter in NAIOP
- To bring additional value to existing members by incorporating a focus on diversity and inclusion throughout Chapter activities and providing resources and programs to promote personal and professional development
- To drive membership growth through a demonstrated effort to include diverse populations that are not yet well represented in NAIOP SFBA
- To define and demonstrate a business case for diversity in CRE



BOARD OF DIRECTORS / COMMITTEES:

- To determine the next president at least two years in advance
- To continually bring on approximately three new board members each year; the make-up of the board should represent the required balance of principals and associates (per the bylaws) as well as industry segmentation and a balance of younger, mid-career, and senior professionals
- To better define expectations for board member engagement (e.g. committee roles, attendance at board meetings)
- To determine future officers and committee chairs through succession planning
- To maintain a “depth chart” of active and effective chapter members for the purpose of identifying future leaders and solicit help from the Advisory Council in this effort
- To keep fully staffed with at least one chair and at least three or more active committee members at all times
- To continually seek to advance members into leadership roles within the chapter and encourage participation on committees each year
- To have at least one leader from the YPG Committee on the board to maintain the connection of the YPG Program with broader Chapter activities
- To better define process for recruiting and moving up in NAIOP (e.g. join, become an active committee member or leader, be invited to board, be invited to become officer)
- To encourage participation by chapter members in the NAIOP Corporate forum programs and in NAIOP Corporate board leadership roles



RECOGNITION / AWARDS:

- To solicit recommendations, to evaluate award opportunities and candidates, and to submit nominations and recommendations annually to the Chapter Board of Directors
- To initiate a program of recognition of award recipients within the Chapter (via website, email, event announcements, etc.)
- To maintain or cause to be maintained an archive of all nominees and recipients of awards
- Together with other industry associations (e.g. BOMA, IREM), to help identify, recruit, and train more college graduates with basic CRE knowledge (and experience via paid internships) through participation in Commercial Real Estate Alliance for Tomorrow's Employees (CREATE); and lend support to an annual fundraising event
- To find opportunities to recognize committee leaders and members for their contributions and accomplishments to the broader membership

FOSTERING CAREER DEVELOPMENT AND PROVIDING EDUCATION FOR ALL CAREER STAGES

YOUNG PROFESSIONALS:

The Chapter has developed the Young Professionals Group (YPG), an education, networking and leadership program. Each year, a select group of real estate professionals unite to take part in the twelve-month, seventy-hour course designed to educate, develop, connect and elevate the commercial real estate industry's emerging leaders. In 2018, the Program welcomed its sixth class of 35 participants.

In addition, it has created a Developing Leaders (DL) program that offers access to tools, networking and resources to Chapter members who are 35 years old or younger for the purpose of gaining a competitive edge in the commercial real estate industry. As of 2018, 220+ members participate in this program. To foster the next generation, the Chapter's goals are:

- To maintain strong YPG and DL programs, with an eye toward continuous curriculum improvement and ongoing efforts to increase interest and participation
- To maintain robust YPG and DL committees of at least one chair and three committee members
- Maintain a class size of at least 30 participants per year for YPG
- To encourage board involvement in both DL and YPG programming



- To endeavor to create integration within the NAIOP Chapter through programming and networking
- To actively promote the YPG program using social media, video, orientation sessions, etc.
- To support YPG Alumni activities, such as Behind the Scenes and to ensure they are well-integrated with the Chapter. Behind the Scenes is an educational series organized by alumni specially designed for young professionals who are looking to develop their careers in Commercial Real Estate, but also open to all interested members
- To continually seek additional sponsorship support earmarked for these activities under the direction of the Chapter's Sponsorship Committee

MID-CAREER:

To explore ideas and opportunities to expand NAIOP SFBA educational offerings for mid-career and senior professionals, ensuring that membership has value.

STRATEGIC VISION & CHAPTER GOALS REVIEW

This plan will be formally reviewed and benchmarked at the mid-point of each year by the Board of Directors to evaluate progress made on goals. It will be updated every three years, or more frequently if required by the Board of Directors.

NAIOP SFBA board approved on Feb. 26, 2019