

# ELEVATING TOGETHER



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# Elevate

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“Raise to an even more important or impressive level” to advance our purpose, mission, and vision

**A. ELEVATE**

# We are CREW San Diego

## 38 Years

of history as a recognized and respected organization

## 233 Members

registered in the San Diego Chapter  
(as of October 2021)

## 12,000+ Members

worldwide connected through CREW Network



# Our North Star

Our purpose, vision, mission and commitment statements will serve as our North Star, guiding us when making decisions in the years to come.

## Purpose

**To provide access to a network of diverse professionals in our chapter and CREW Network to generate dynamic business opportunities; serve as a trusted source in the community; and promote women’s growth and development in commercial real estate.**

## Vision

**Every woman has an equal opportunity to thrive in commercial real estate.** Diverse commercial real estate professionals in San Diego advance professional and business success through relationships, networking and education, support women in commercial real estate, and achieve and continue equity and parity.

## Mission

**To elevate a network of commercial real estate professionals in San Diego**—by fostering inclusive relationships, offering access to networks of developing business opportunities and providing educational programs to achieve growth and success.

# Our North Star-Continued

## Commitment

### Driving Success

- Serving as a respected and trusted association that provides access to a network of potential business relationships
- Offering networking and collaboration opportunities and celebrating done deals
- Elevating a sense of belonging for diverse professionals in the commercial real estate industry

### Educating

- Providing methods, ideas, trends and best practices for the advancement of commercial real estate professionals
- Exposing professionals to the multi-faceted aspects of the commercial real estate industry
- Outreaching to students and those more junior in their career to educate about the potential opportunities commercial real estate provides as a rewarding and viable career path

### Supporting Community

- Creating an inclusive and welcoming space for all professionals to bring their authentic selves to our network
- Offering mentoring opportunities with experienced and established professionals
- Promoting industry-leading members as role models and thought leaders



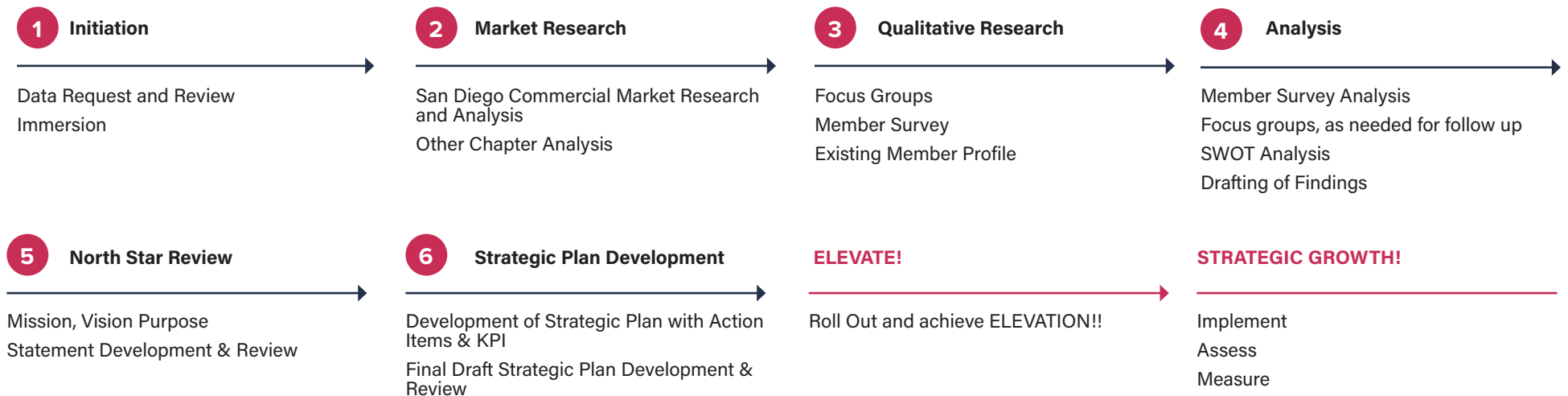
# Elevate! CREW San Diego

Since the inception in 1989, CREW San Diego has ceaselessly strived to promote, educate and support a network of professionals in the field of commercial real estate. With great pride in our history and achievements, we are driven to keep advancing and expanding our impacts in the industry.

## Strategic Plan to Elevate Together

In October 2020, CREW San Diego's leadership team commenced its efforts to develop a Strategic Plan by engaging Volz Company, an advisory firm serving mission-driven organizations and real estate development companies on the advancement of their strategic real estate, operational and business plan objectives. The process of Strategic Planning aimed to identify the important priorities on which we need to focus, to incorporate candid recommendations from members, sponsors and commercial real estate professionals, and to establish actionable strategic objectives and goals with a clear timeline. The new Strategic Plan will be our call to action to ELEVATE ourselves.

To examine the current status and future opportunities, previous surveys, plans and reports as well as market studies were reviewed and synthesized. The process also involved a wide range of stakeholders through interviews, surveys and focus groups to bring together different voices in our community. We also examined other similar chapters' activities and interview chapter leaders. This extensive and transparent engagement process welcomed bold ideas and new thinking that could further strengthen our organization for another successful 38 years and beyond.



# Strategic Objectives

## Intent

A strategic plan requires a clear definition of its objectives (“Strategic Objectives”) to serve as the overarching determinant for all decision-making, recommendations, and implementation. These stand as the pillars from which we elevate CREW San Diego!

**ELEVATE!** focuses on advancing the identified strategic objectives and narrowing or eliminating the gap between current and aspirational states.

## Process

This was accomplished on November 16, 2020 when Volz Company led an interactive process called an Immersion Workshop with CREW San Diego leadership to explore the existing and aspirational state for CREW San Diego. It was followed by a review of various mission-based objectives and their relative importance to Elevate.

During the Immersion Workshop, participants were asked a series of questions regarding CREW San Diego, including what drew them to CREW San Diego, their aspirations for the organization and how they would want various stakeholders (commercial real estate industry overall, sponsors, prospective and current members) to describe CREW San Diego. The participants created a short list of strategic objectives from themes identified in the opening conversation. Once the list was compiled, participants provided a rating of importance for each strategic objective relative to Mission, Membership, Engagement and Sponsorship.

Furthermore, Volz Company interpreted organizational data and survey/focus group results through the lens of the organizational priorities discussed in the Immersion Workshop.





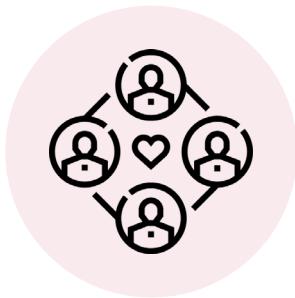
# Strategic Objectives-Continued

While a number of objectives were ranked, the discussion largely focused on ways to improve and maximize the membership experience and ultimately, retention. The discussion notes of the Immersion Workshop are provided in B. Research and Feedback Analysis.

The following objectives were ranked as having the most priority:

## Strategic Objectives

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**Engagement**



**Retention**



**Diversity**  
(types of job, years of experience, and cultural background)



**Communication**

# Our Path to Elevate

## Timeline

### November 2020 – February 2021

- Research
- Immersion Workshop
- Focus Groups
- Survey
- Market Research

### March – September 2021

- Analyzed Feedback Analysis
- Additional Interviews with Other Chapter Leaders
- Defined Current Conditions and Future State/Vision
- Developed Strategic Directions
- Identified Goals and Action Items
- Determined Timeline and Responsibilities

### October 2021

- #ELEVATE Plan Launch

## Participants

### Focus Groups with:

- Current Members
- Former Members
- Current Sponsors

### Survey with:

- Current Members
- Current Sponsors

### Interviews with:

- Other CREW Chapters



CREW San Diego Wants to Hear From You

**38**

focus group participants

**57**

survey participants

**30+**

virtual and in-person  
conversations

# Implementation to Achieve Strategic Objectives

## Strategic Objectives

## 5 Key Goals



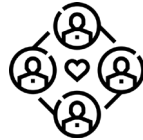
Engagement



Retention



Communication



### Member engagement

Create optimal access to strengthen relationships among members by providing valuable programs and events for networking and sharing of professional expertise



Diversity



### Membership diversity (specialties, years of experience, and ethnicities)

Diversify the membership base and strengthen inclusiveness to expand business opportunities for members



Engagement



Retention



Communication



### Thought leadership presence

Highlight the successes of members in the national, regional, and local industry



Engagement



Retention



Communication

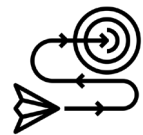


### Value of sponsorship

Demonstrate that financial sponsorship of CREW San Diego drives business to sponsors



Communication

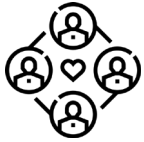


### Strategic Board with active committees

Board regularly reviews strategies based on implementation performed by committees

# Implementation to Achieve Strategic Objectives-Continued

## Objectives and Timeline

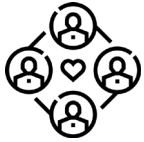


### Member engagement

Create optimal access to strengthen relationships among members by providing valuable programs and events for networking and sharing of professional expertise

Strategy	Action Items	Responsible Board Member/Committee	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
			'21	'22	'22	'22	'22	'23	'23	'23	'23	'23	'24	'24	'24
Encourage one-on-one interactions between members	Continue to hold small, member-only events	Education + Program													
	Diversify small-scale meeting topics														
	Share attendee lists (names and company names) to event participants in order to encourage proactive interaction														
	Provide member outreach recommendations quarterly per each member’s interest and business needs; per asset class, specialty, career stage	Membership													
	Refine CREWMates and mentorship programs and remove redundancy	Career Outreach													
	Promote CREWMates by introducing existing match examples														
	Continue communicating Done Deals stories with members and potential members via newsletters	Marketing													
Increase the participation of non-committee members	Create cohort groups (pods) led by membership committee/board members for regular check-ins	Membership													
	Launch Emerging Leaders networking initiative - 0-5 years experience members to network and feel included	Career Outreach and Membership (Guided by DEI Taskforce)													
	Track each member’s event participation	Education + Program													

# Implementation to Achieve Strategic Objectives-Continued



## Member engagement-continued

Create optimal access to strengthen relationships among members by providing valuable programs and events for networking and sharing of professional expertise

Strategy	Action Items	Responsible Board Member/Committee	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
			'21	'22	'22	'22	'22	'23	'23	'23	'23	'23	'23	'24	'24	'24
Continue lowering the logistical barriers to attend events	Use a hybrid model: virtual and in-person	Education + Program														
	Ensure events are provided in a variety of times of the day and days of the week	Sponsorship, Membership,														
	Rotate event venues in the San Diego County	Special Events														
	Oversee the overall mix of the events	Board														
	Share an event calendar with members, sponsors, and potential event participants at least six months ahead	Marketing, Education + Program														
Provide educational programs addressing current topics	Determine an annual list of current topics	Education + Program														
	Develop programs that significantly impact the majority of membership and focus on distinguishing CREW SD programs from those provided by other local association															
	Host panel discussions among members bi-monthly for different asset class															
	Annually evaluate program quantity, topics and quality with a member survey															
	Co-host programs with other local associations including but not limited to NAIOP, ULI, SMPS, Downtown San Diego Partnership, etc.	Education + Program, Outreach, DEI Taskforce, President														
Expand program promotions	Co-promote programs with other local associations including but not limited to NAIOP, ULI, SMPS, Downtown San Diego Partnership, etc.	Marketing														

# Implementation to Achieve Strategic Objectives-Continued



## Member engagement-continued

Create optimal access to strengthen relationships among members by providing valuable programs and events for networking and sharing of professional expertise

Strategy	Action Items	Responsible Board Member/Committee	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
			'21	'22	'22	'22	'22	'23	'23	'23	'23	'23	'24	'24	'24	'24
Integrate new members so they may ascertain the optimal benefits of CREW San Diego	Set up a welcome committee dedicated to ensuring a successful first year of membership experience	Membership														
	Require new members to participate in CREW 101															
	Utilize "pods" to share CREW 101 information															
	Host a new member interview to offer a "road map" to success by getting the most out of the membership and identify the type of relationships members are seeking															
	Follow up with members after one year to evaluate their experience and score from 1 - 5 based on defined factors															

# Implementation to Achieve Strategic Objectives-Continued



## Membership diversity (specialties, years of experience, and ethnicities)

Diversify the membership base and strengthen inclusiveness to expand business opportunities for members

Strategy	Action Items	Responsible Board Member/Committee	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
			'21	'22	'22	'22	'22	'23	'23	'23	'23	'24	'24	'24	'24
Establish DEI Taskforce	Define the goals of DEI Taskforce	President, Board, DEI Taskforce													
	Assign DEI liaison members in each committee														
	Establish DEI Committee														
Develop a targeted recruitment strategy	Create a target list for the outreach to senior professionals in different asset classes and industry specialties and identify potential relationships with existing members	Board, Membership, DEI Taskforce													
	Invite prospects to one relevant educational program and one social event; and follow up to get feedback and share the benefits of membership														
Align student engagement to the purpose of CREW	Refine the goals of student membership	Career Outreach, DEI Taskforce													
	Create guidelines regarding CREW's liability for the involvement of underage members														
	Create a target list of potential university and college partners and send updated UCREW information annually														
	Create a list of real estate companies that provide internship programs and share UCREW information														
Develop strategic alliances with multicultural real estate organizations (such as NAGLREP, NAREB, NAHREP, AREAA, and AAa/e)	Co-host panel discussions where CREW members can expand their professional network while sharing industry expertise	Education + Programs, DEI Taskforce, Marketing													
	Co-host professional development events														
Social media strategy	Utilize LinkedIn and Instagram to enhance awareness of CREW San Diego	Marketing, DEI Taskforce													

# Implementation to Achieve Strategic Objectives-Continued



## Thought leadership presence

Highlight the successes of members in the national, regional, and local industry

Strategy	Action Items	Responsible Board Member/Committee	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
			'21	'22	'22	'22	'22	'23	'23	'23	'23	'23	'23	'24	'24
Grow the base of thought leaders	Develop a speaker bureau identifying senior members with specific specialties and highlight on the website	Marketing, DEI Taskforce		█	█			█	█			█	█		
	Expand leadership programs targeting different career stages	Education + Programs		█	█	█	█	█	█	█	█	█	█	█	█
Continue promoting CREW San Diego's effort to assist members get nominated for local and national awards	Inform members mid-year of end-of-the-year awards (both chapter and industry awards)	Marketing				█				█				█	
	Present award winners on the website and social media to enhance online presence		█				█			█				█	
	Identify potential candidates and reach out	President-Elect, DEI		█		█		█		█		█		█	
	Conduct a survey to receive recommendations from members	Taskforce, TW2 (in-kind PR sponsor)					█				█				█



# Implementation to Achieve Strategic Objectives-Continued

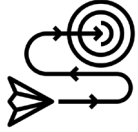


## Value of sponsorship

Demonstrate that financial sponsorship of CREW San Diego drives business to sponsors

Strategy	Action Items	Responsible Board Member/Committee	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
			'21	'22	'22	'22	'22	'23	'23	'23	'23	'23	'23	'24	'24
Enhance communication with sponsors/ employers	Revise the top 3 reasons a sponsor would want to participate	Sponsorship, Membership, Ed/Programs													
	Get quotes from sponsors and include them in the messaging														
	Update and publish a sponsorship package annually, including annual and special event sponsorship information														
	Set up annual, scheduled communication with sponsors to numerically evaluate their thoughts on the investment relative to return														
	Create an annual report for previous, existing and potential sponsors about positive highlights of membership information and highest attended programs														
Assist potential or 'soon to be expired' sponsors' internal decision-making process	Provide one-on-one consultation on how to communicate the values of CREW SD to the employers	Sponsorship													
Strengthen relationships with sponsors	Continue hosting sponsor-only events	President, Sponsorship, DEI													
	President to reach out and welcome new sponsors	Taskforce													
	Track and announce the recognition of long-term sponsors (5 year, 10 year, etc.)														
Advance the social impacts and values of CREW	Continue the collaboration with the Network's Building Future Foundation	Foundation													

# Implementation to Achieve Strategic Objectives-Continued



## Strategic Board with active committees








Board regularly reviews strategies based on implementation performed by committees

Strategy	Action Items	Responsible Board Member/Committee	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
			'21	'22	'22	'22	'22	'23	'23	'23	'23	'24	'24	'24	'24
Review and update the strategic plan	Review the current state, achieved goals, challenges and priorities	President, Immediate Past President, President Elect, Board	█				█				█				█
Review and revise goals and action plans	Review target goals and action items mid-year	Board and committee chairs			█				█				█		
	Revise the need to change direction					█			█				█		
Designate President a Strategic Plan Champion	Ensure Board's decisions are aligned with suggested guidelines in the strategic plan	President	█	█	█	█	█	█	█	█	█	█	█	█	█
Path to Leadership	Mentor committee members roll into Committee Chair and/or Board position	Board	█	█	█	█	█	█	█	█	█	█	█	█	█
	Meet mid-year to identify active chapter members to recruit for Board, Chair and Committees roles	President, Immediate Past President, President Elect and Delegates			█				█				█		
	Develop and distribute educational materials about how to become a committee member/board member	Membership				█				█				█	
	Hold annual event to define the path to leadership and board service for CREW San Diego. Goal is to make this a more transparent process for members interested in service on the board	Membership and President; Panel to include past board members and Presidents				█				█				█	
Committee Recognition	Include Committee Members on CREW Website, Acknowledge Committee Members at Events, etc.	President, Board, Marketing, Chapter Admin		█				█				█			

# Implementation to Achieve Strategic Objectives-Continued

## Key Performance Indicators Aligned with the Strategic Objectives

CREW San Diego will use the following key performance indicators to measure and guide the implementation process of the ELEVATE Strategic Plan.

Strategic Objectives	KPIs
 <p>Engagement</p>  <p>Retention</p>  <p>Communication</p>	<h3>Membership</h3> <p>Increase new membership and membership renewal rates by:</p> <ul style="list-style-type: none"><li>▪ Renewal Rate: 75 percent</li><li>▪ Legacy member renewal rate: 85 percent</li><li>▪ New membership: 25 people per year</li></ul>
 <p>Diversity</p>	<h3>Diversity</h3> <p>Establish DEI Taskforce and assign DEI liaison members for each committee</p>
 <p>Engagement</p>  <p>Retention</p>  <p>Communication</p>	<h3>Sponsorship</h3> <p>Increase annual revenue by 5 percent from industry support of our mission including:</p> <ul style="list-style-type: none"><li>▪ Sponsorship</li><li>▪ Special Events</li><li>▪ Programming</li></ul>



## B. RESEARCH AND FEEDBACK ANALYSIS

# Immersion Workshop Discussion Notes

## Member Experience

### Current State

When describing the CREW San Diego member experience, there was discussion about the open and supportive culture of its organization, the value in having a notable number of leaders/decision-makers represented and how that positively influenced “getting deals done” and professional growth. However, it was acknowledged that perceptions of CREW San Diego from the commercial real estate industry and prospective members was mixed with some views that CREW San Diego was “only accessible to women” and caters to professionals in business development.

The group discussed ways to improve membership engagement and retention, including membership education/programs, committee participation, understanding the jobs of members and how to utilize those relationships, and community outreach. They also stressed the importance of increasing diversity within membership both professionally and culturally; and building multiple pipelines for recruitment (student outreach and other markets) to cultivate emerging leadership. Additionally, the group discussed the value in increasing visibility for its members and the caliber of CREW San Diego events.

### Aspirational State

When the group was asked how they would like commercial real estate industry and prospective members to describe CREW San Diego, the words “authentic” and “thought leaders” emerged. Overall, it was determined that improved communication and onboarding processes, as well as community outreach and diversifying membership would be integral to achieving CREW San Diego’s strategic priorities.

## Sponsor Experience

### Current State

The group then discussed the CREW sponsor experience. It was noted that some sponsors have dropped out because they no longer had a representative member; also acknowledged was the impact that Covid-19 has had on budgets. The group shared that sponsorship feedback had included sponsors feeling that sponsoring events provided more value/attention, while other sponsors felt that they had received “little recognition for their involvement/sponsorship.”

### Aspirational State

The group determined that CREW needs to do more personalized communication to sponsors as well as outreach to individuals beyond CREW contacts to build relationships and convey the value and benefits of sponsorships.

# SWOT Analysis

## Strengths

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- Recognized and respected organization with the history of 38 years
- Continuity of the organization supported by active participation of leadership and legacy members as well as previous board members and presidents
- Board and committee members dedicated to drive meaningful business deals through genuine relationships
- Strong engagement of chapter members and sponsors
- A robust base of sponsors which provide fiscal stability
- Financial capacity and willingness to invest back to members
- Valued mentorship program
- Strong promotion of members through Done Deals announcements and industry award recognition
- Social and educational programs appreciated by members and sponsors
- Existing demographic data of membership including the information about members' titles, specialties, and years of experience
- Access to CREW Network, which provides networking opportunities with 12,000 members worldwide
- Growing presence in social media (especially LinkedIn and Instagram)

## Weaknesses

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- New members feeling intimidated to connect with existing members
- Members dropping out due to lack of business leads
- Low awareness of the chapter member directory as an outreach/networking tool
- Diversity of membership (industry, years of service)
- The website design and Search Engine Optimization
- Lack of awareness of CREW San Diego 101 and CREW Network resources
- Challenge to recruit senior-level professionals in the industry
- Challenge to recruit vendor members due to the limitation requirement (two individuals per profession)
- Integration of student members requiring further refinement in terms of its goals
- Redundancy between CREWMates and mentorship programs
- Lack of perceived transparency in the process of appointing Board members
- Low participation in committees
- Minimal awareness of CREW San Diego's philanthropic initiatives

# SWOT Analysis-Continued

## Opportunities

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- Positive economic outlook in 2021-2023 in the United States and San Diego
- Industry awareness of the need for quality networking organizations that promote diversity, equity and inclusiveness in commercial real estate
- Collaboration with other chapters and local commercial real estate groups
- Hybrid style of events (in-person and virtual) expected to be well received in a post-pandemic world
- Shift in work environment in a post-pandemic world (hybrid and/or remote working)
- Widely accepted use of virtual communication tools
- Emerging commercial real estate professionals seeking resources and quality networks to advance their careers
- Fundraising opportunities in San Diego
- Low representation of women in the local commercial real estate industry

## Threats

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- Efforts needed to educate some local commercial real estate leadership about the business values CREW membership provides
- High cost of living and housing insecurity causing young professionals to leave the local market
- Uncertainty caused by economic downturn and/or natural disasters that threat business continuity
- Competition with other organizations that pursue similar goals such as ULI and NAIOP to support women and commercial real estate in the industry
- Limited base of local speakers for high quality programs
- Generational differences due to having five generations in the workplace
- Distance to travel to in-person meetings and programs across San Diego County

# Focus Groups

Volz Company conducted a total of nine focus groups with 38 participants from January 12 to January 14, 2021. The groups were segmented into five different cohorts:

- Current members who joined CREW no earlier than 2018 (4 years or less)
- Current members who joined CREW between 2012 and 2017 (between 4 and 8 years)
- Current members who joined CREW no earlier than 2011 (more than 8 years)
- Previous members who have decided not to renew their membership
- Sponsors

## Memberships

During the focus groups, members shared their CREW San Diego experiences including: expectations and actual experience, recommendations for elevating diversity within membership, the value that membership provides and ways to improve, and aspirations for the organization.

**Personal and professional development, friendship/support and “deal making” for women are considered top values of membership.** In an industry that was described as male-dominant, having a supportive network of women and opportunities to make deals is important to members, and the group as a whole. Members shared insights such as, “I found my tribe [at CREW]” and “CREW was internet before internet,” and “never cold calling other CREW members.”

While deal-making was cited as being one of the strongest values CREW San Diego offers, some members thought this component was weakening and cited a lack of diversity; having the same circles of people as members is contributing to a decline into additional deal-focused conversations. Members who did not renew their membership shared that a shift in business targets and sectors affected their renewal decision.

**Different Understanding of Mission.** Focus groups indicated a perception gap between established members and newer members. While members who have more than 4 years of experience tended to describe CREW San Diego as an organization that supports women, members who have been with CREW San Diego less than 4 years had a stronger tendency to describe it as a women-only organization.

**Educational programs are highly appreciated by all participants.** Online events were noted as being positive experiences for all members, particularly because logistics were mentioned as one of the biggest challenges when participating in person. Feedback included keeping online options as a component of events, post-Covid, for people who are unable to attend in-person. There was also a request for diversity in topics especially by long-term members who have participated in a number of educational programs provided by CREW San Diego.

**Social programs are appreciated and more diverse types of social events are requested.** The “Coffee Corners” events were highly appreciated by all



## Focus Groups-Continued

participants and seen as a way to make meaningful interaction with other members. Some members mentioned that they would like to see a variation in social events that could go beyond wine tasting and golfing.

**Diversity of membership is integral to CREW San Diego's growth.** The need for CREW to strengthen its efforts to diversify the membership was discussed as well as potential means to do so. Most participants recommended grassroots efforts that purposefully target certain groups of people (i.e. women of color, younger women, women in different industries such as engineers, brokers, asset managers, developers. There needs to be deliberate action to encourage more diverse members to participate in board activities. That being said, having male support and involvement was still deemed valuable.

**Members find mentorship helpful.** Members shared that intergenerational interactions through the mentorship program were positive. It has allowed more junior members to learn from legacy members to be even more successful professionals in the industry. Members also enjoy engaging student members and helping them understand their potential career paths in the CRE industry.

**Being a new member can be an intimidating process.** It was shared that introduction into the organization could be intimidating and existing members seem "cliquish." It was suggested that having a dedicated member to greet new members and introduce them around would be helpful.

**Looking to the future, members would like to describe CREW San Diego as a supportive, diverse organization known for its educational leadership opportunities to connect and elevate local real estate professionals.**

## Sponsorships

**CREW San Diego is well-regarded for its strong, successful women members, their integrity and passion for the business.** Many sponsors start as members and acknowledge the important role CREW San Diego has played in providing networking and educational opportunities for women. When comparing CREW San Diego to other local organizations in the local market, it was noted that CREW San Diego feels more localized and proactive when putting together events and getting people involved.

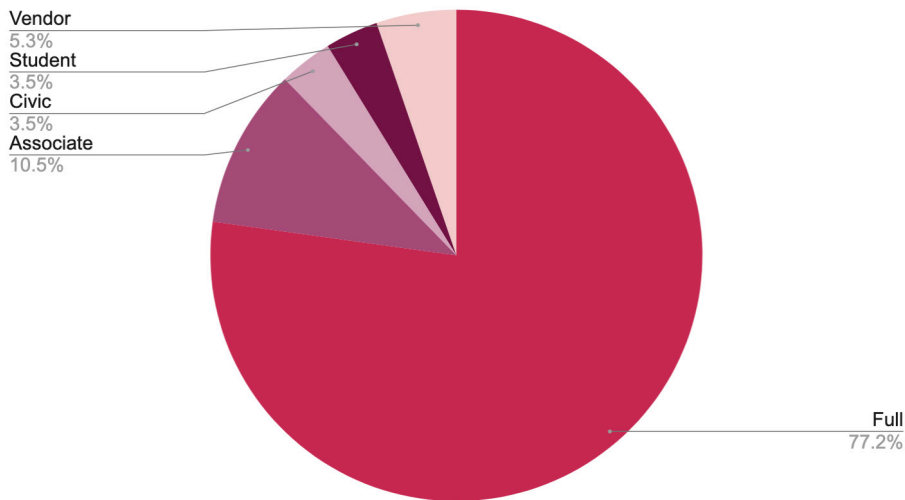
**There are contrasting perceptions about the value of a CREW San Diego sponsorship.** Some sponsors complimented how detail-oriented the events were and felt that their sponsorship provided good visibility because of the different ways that CREW San Diego would highlight them at events (i.e. slideshows, logos on tables). Others felt there was not much difference between being at the bronze or platinum level for an overall benefit to the company; and that if they had an annual membership, an event sponsor could come in and "steal the thunder" from them. Feedback also included that the sponsorship benefits feel outdated and need to be revamped; that the sponsorship committee needs to show the sponsors the value behind what they are getting.

# Survey

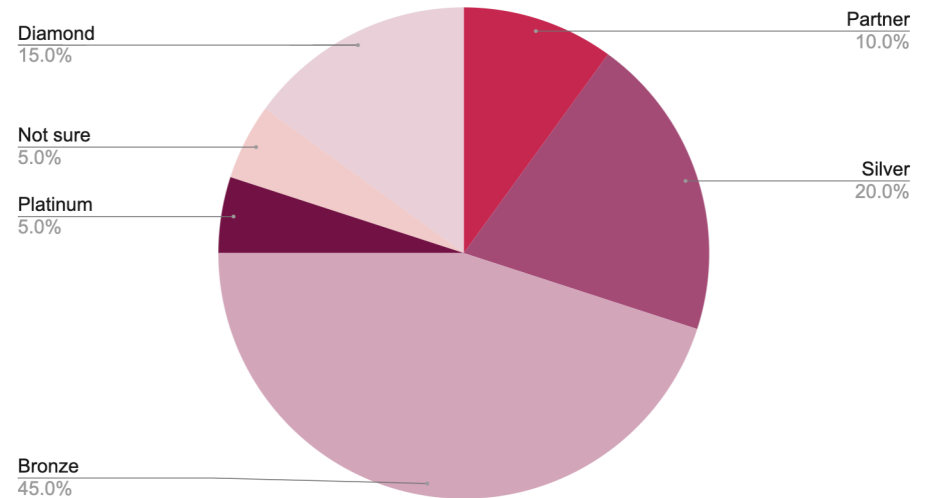
## Overview

Volz Company conducted an online survey of CREW San Diego members from February 2 to March 1, 2021. The survey was designed to help identify priorities to develop a clear strategic vision for the future of CREW San Diego. A total of 57 members participated among which 20 respondents are also sponsors. Most of the respondents hold Full membership (77.2%). Among respondents who are both members and sponsors, 45% are Bronze sponsors, 20% Silver, 15% Diamond, 10% Partner and 10% Others.

What is your current membership status?




At what level do you sponsor?



# Survey-Continued

## Highlights

- Overall opinions on CREW San Diego are favorable and the organization's value is considered positive.
- Most of the respondents have been working in the commercial real estate industry for over 10 years and have been CREW San Diego members for 4 or more years.
- Business development and networking is a primary reason to join CREW San Diego and Networking is the most valued membership benefit.
- Member benefits and committee participation are highly valued, with networking opportunities, business development and mentorship rated as the highest quality benefits CREW San Diego offers.
- Respondents are satisfied with the current size of membership.
- Respondents have actively participated in events and would like to see even more educational/professional development, activity-based and social events in the future.
- Respondents cited that the visibility of CREW 101 and the introduction of new members could be improved.
- Virtual events have been popular, and members would like to see them continued, even after in-person events resume.
- The areas that members consider the most diverse for the organization (commercial real estate discipline/fields and work experience levels) are also the areas in which they want to grow more diversity.
- Overall quality of CREW San Diego sponsor benefits were perceived positively.
- Responses indicate that satisfying membership experience leads to sponsorship.
- Most appreciated sponsorship benefits include full membership, Sponsor Appreciation Event tickets, Golf Foursome with cart, and Special Events tickets.



CREW  
SAN DIEGO

**ELEVATE!**  
Strategic Plan Development for CREW San Diego  
2020-2021

**Your opinion matters to CREW San Diego's Future. Let's Elevate!**

The form Your opinion matters to CREW San Diego's Future. Let's Elevate! is no longer accepting responses.  
Try contacting the owner of the form if you think this is a mistake.



# Survey-Continued

## Current and Aspirational Understanding

Respondents describe CREW San Diego in its current state using words such as "Network," "Connected," "Empowering," "Supportive," "Educational," and "Women/For Women."

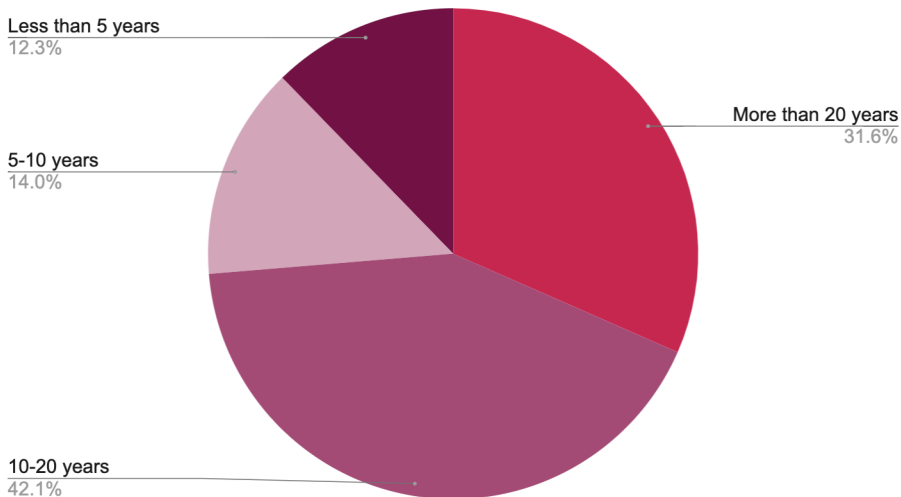
Top words that describe the aspirational state of CREW San Diego include: "Inclusive," "Connected," "Empowering," "Diverse," "Leaders," and "Worthwhile." It indicates that **respondents desire to continue a strong sense of supportive, engaging, and educational community while enhancing diversity, industry leadership, and the value of membership/sponsorship.**

## Membership

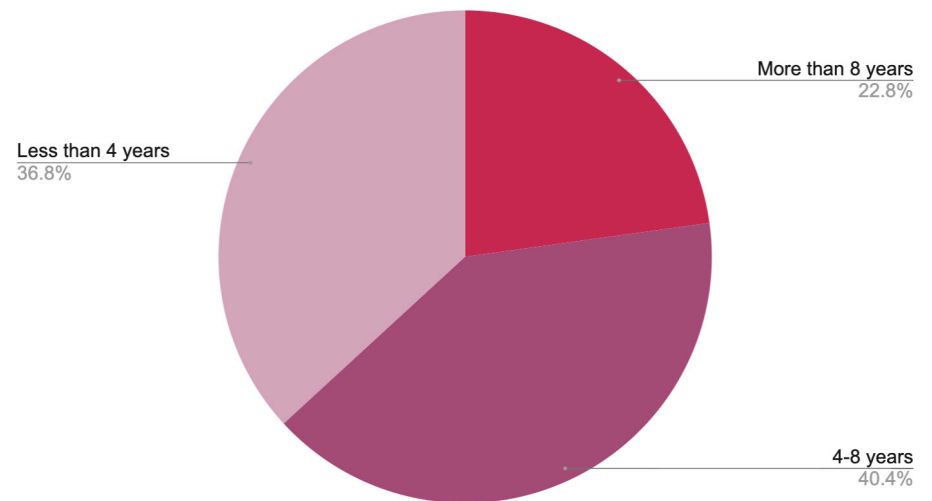
More than 73% of respondents have been working in the commercial real estate industry for over 10 years and 63% have been CREW San Diego members for 4 or more years.

### Business development and networking is the primary reason to join CREW San Diego

How long have you been working in the commercial real estate industry?



How many years in total have you been a member of CREW San Diego?



# Survey-Continued

The majority of respondents (95%) have not taken a break of more than a year from membership and 70% of members had heard about CREW San Diego through industry relationships. The primary reason cited for joining CREW San Diego was business development/networking (60%), followed by dedication to advance and support women in the commercial real estate industry (26%) and professional development (14%).

## Respondents are satisfied with the current size of membership

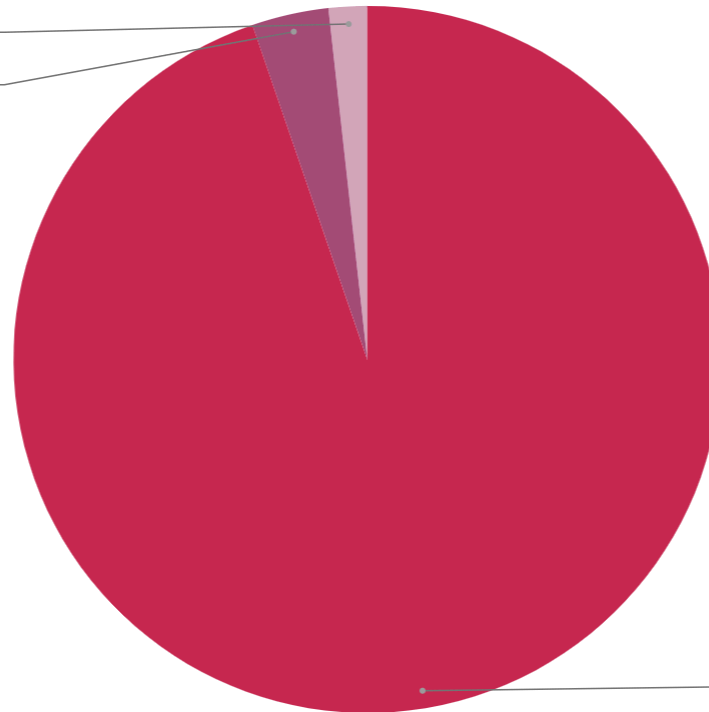
Have you taken a break from membership more than a year and rejoined? If so, what was the main reason?

Organization/leaders of the chapter - now improved

1.8%

Budget constraints

3.5%

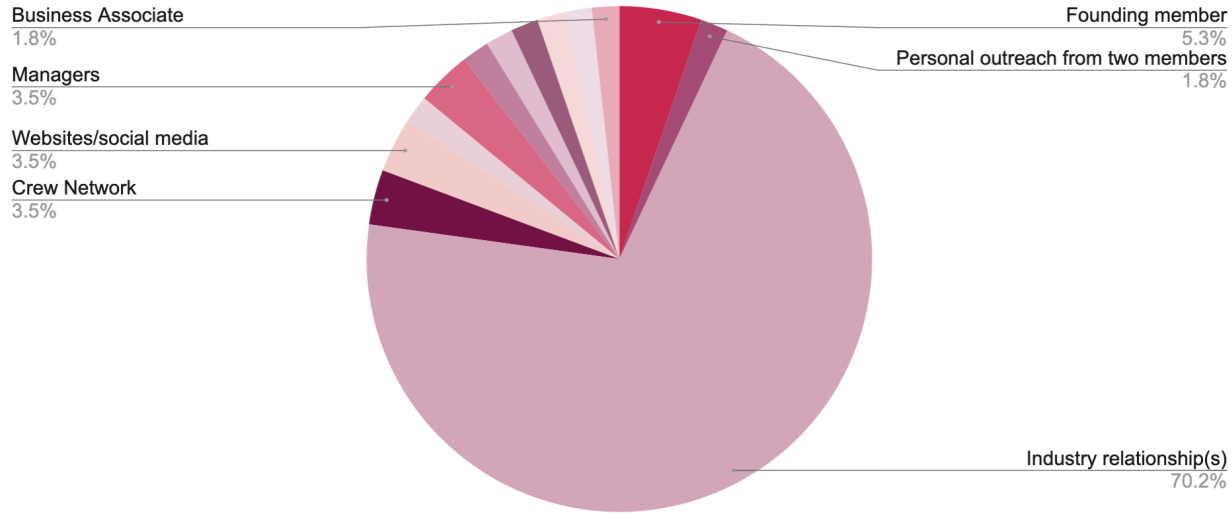


I have not taken a break.

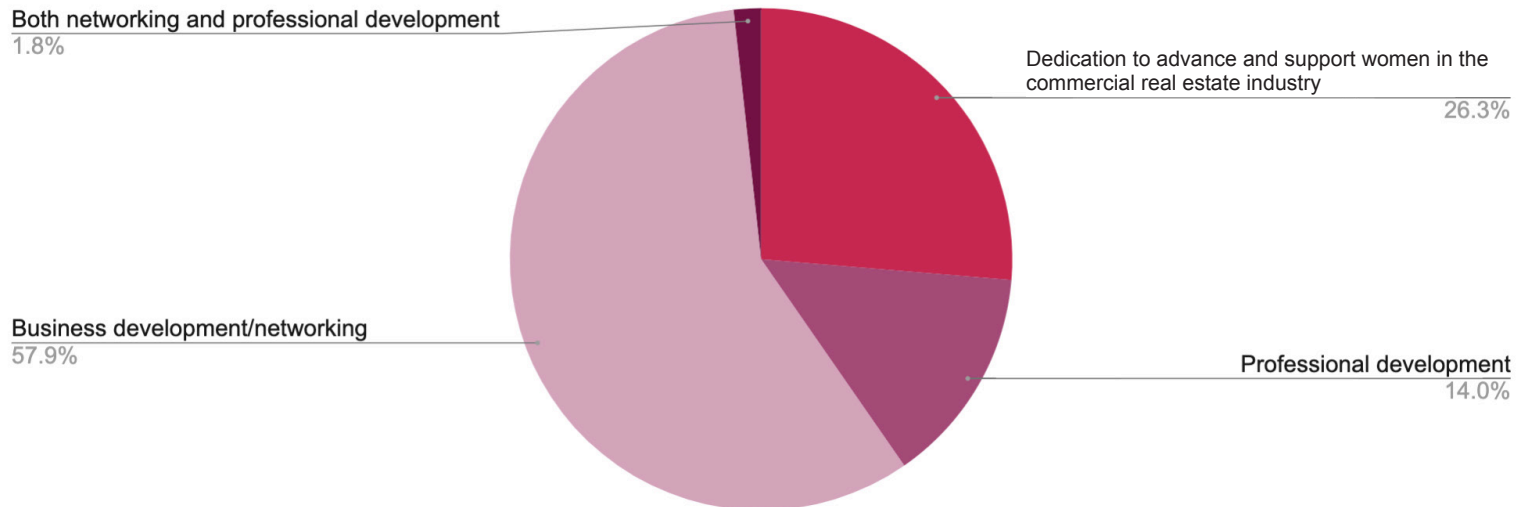
94.7%

# Survey-Continued

How did you hear about CREW San Diego?



What was your primary reason for joining CREW San Diego?



# Survey-Continued

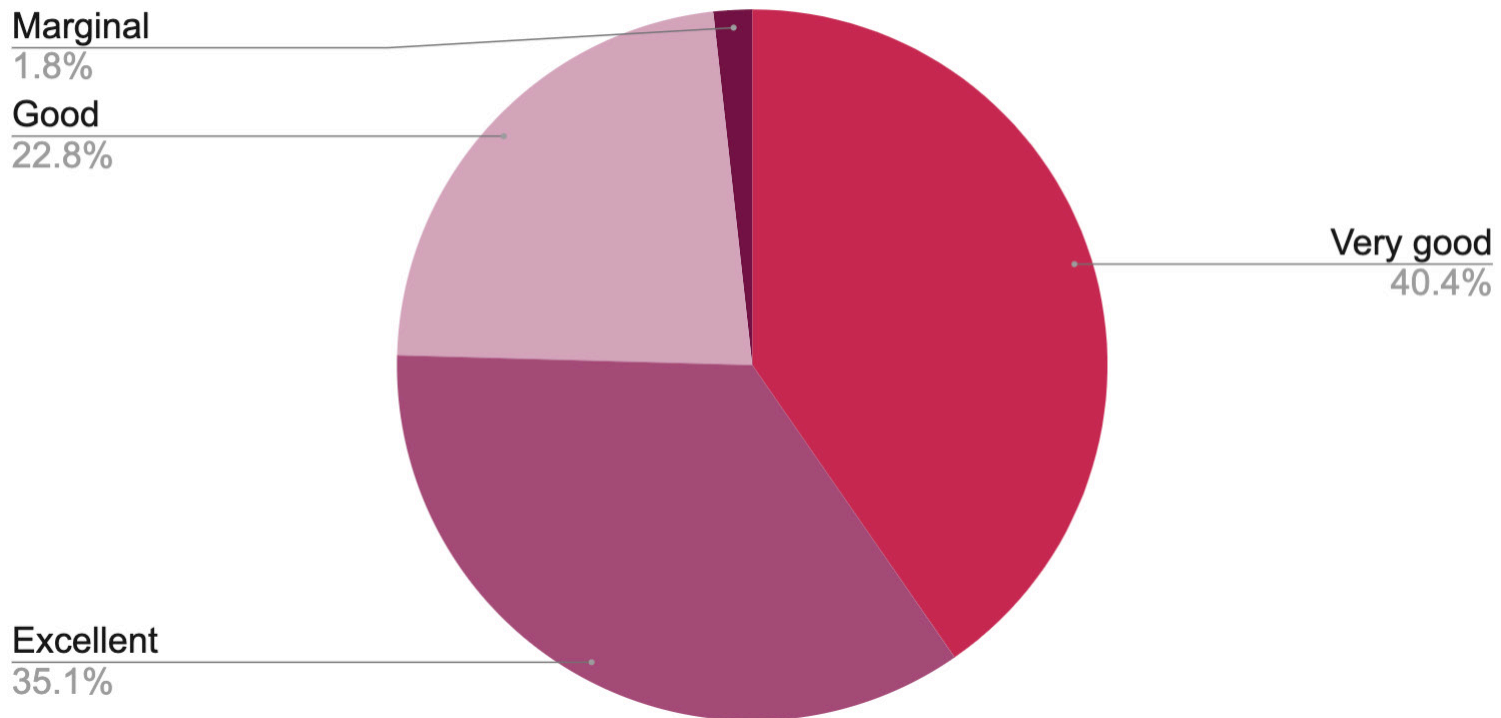
When asked how they felt about the size of CREW San Diego (around 200 members), the overall response was positive with the current size, with 46% indicating that they are “satisfied, just right size” and 46% weighing in as neutral, “size doesn’t matter much.”

## Overall experience with CREW San Diego is satisfying

Overall opinions on CREW San Diego were very favorable, with 91% of respondents “extremely” or “very likely” to recommend the organization to someone in the commercial real estate industry. In the same vein, 93% of respondents have already renewed their membership for 2021, with 98% rating the organization’s value from “good” to “excellent.”

## Engagement

How would you rate the overall value of your membership?



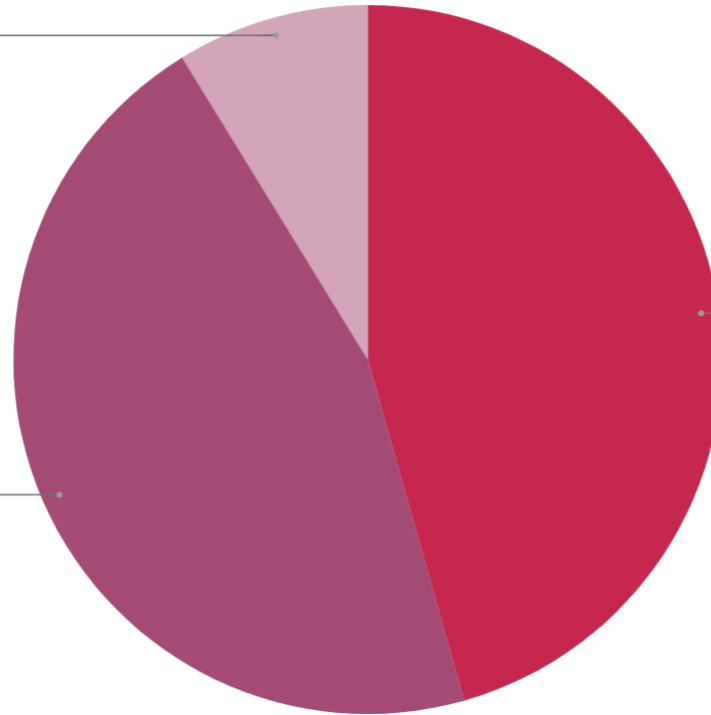
# Survey-Continued

How satisfied are you with the current size of CREW San Diego membership?

Organization/leaders of the chapter - now improved  
8.8%

Satisfied-Just right size  
45.6%

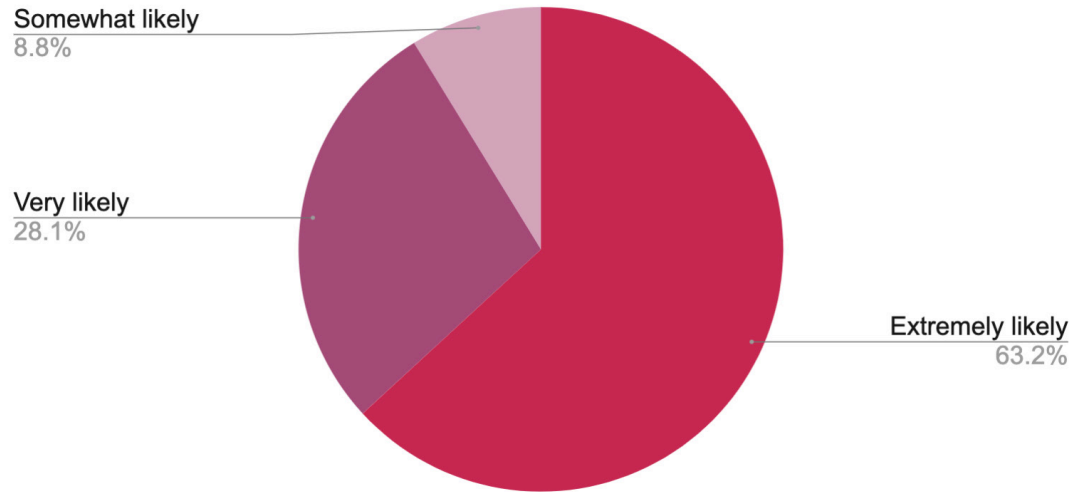
Neutral-The size doesn't matter much to me  
45.6%



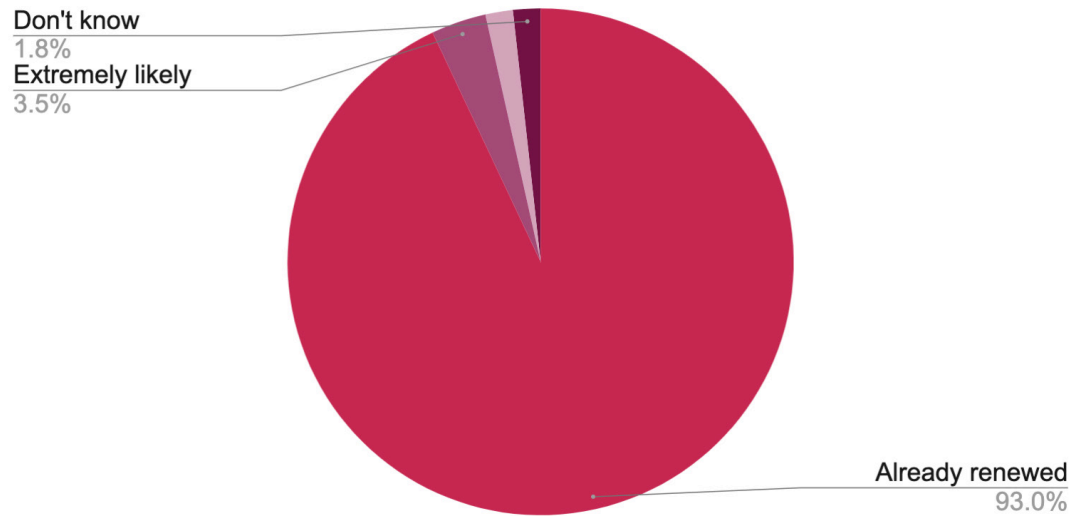


# Survey-Continued

If someone in your profession were to ask your advice on belonging to a professional association, how likely would you be to recommend CREW San Diego?



How likely are you to renew your membership in 2021?



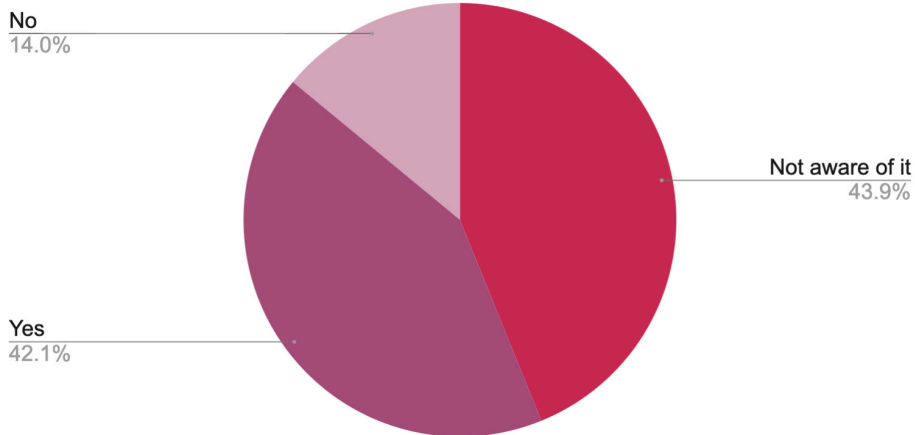
# Survey-Continued

## Stronger promotion for CREW 101 is needed

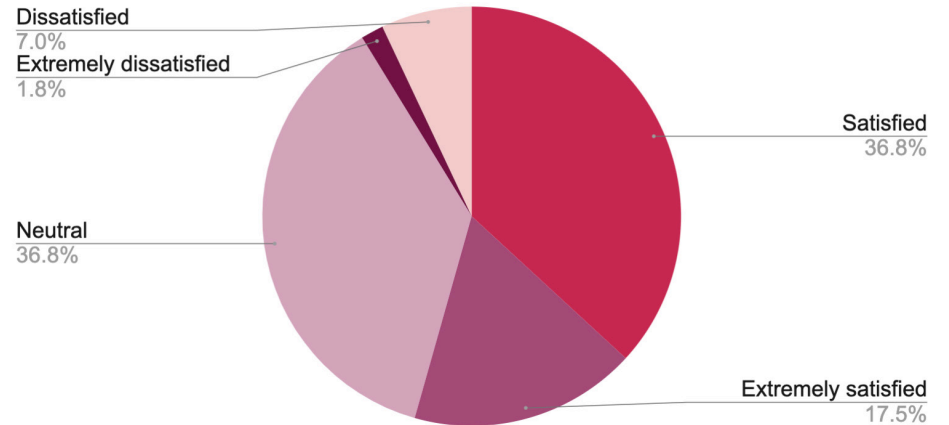
When asked about participation in CREW 101 since joining CREW San Diego, 42% of respondents said yes, they had participated, and 44% said they were not aware of it, indicating there is a need to market the program more visibly to members, particularly new ones. When asked how satisfied they were with the introduction on how to maximize the value of a CREW San Diego membership, 55% of respondents indicated they were satisfied, with 37% feeling neutral, and the remainder unsatisfied.

## Committee experience is highly valued

Have you participated in CREW 101 since you joined CREW San Diego?



How satisfied were you with your initial introduction on how to maximize the value of a CREW San Diego experience?

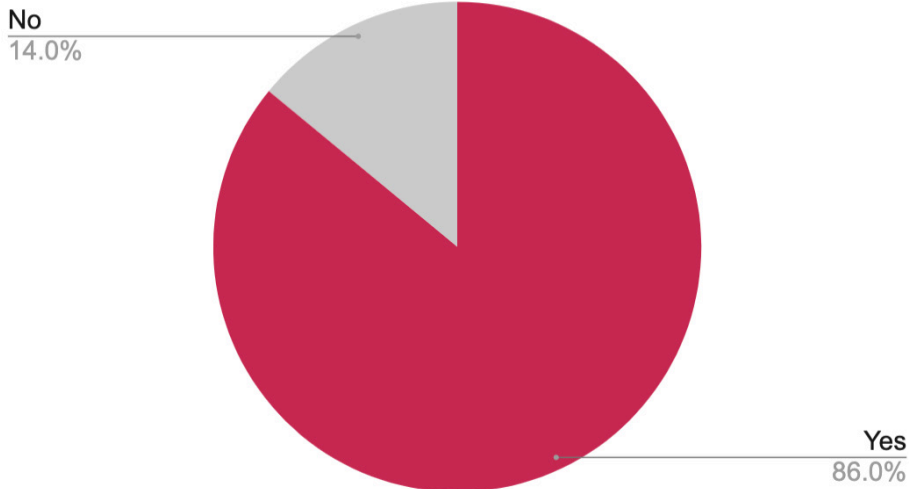


# Survey-Continued

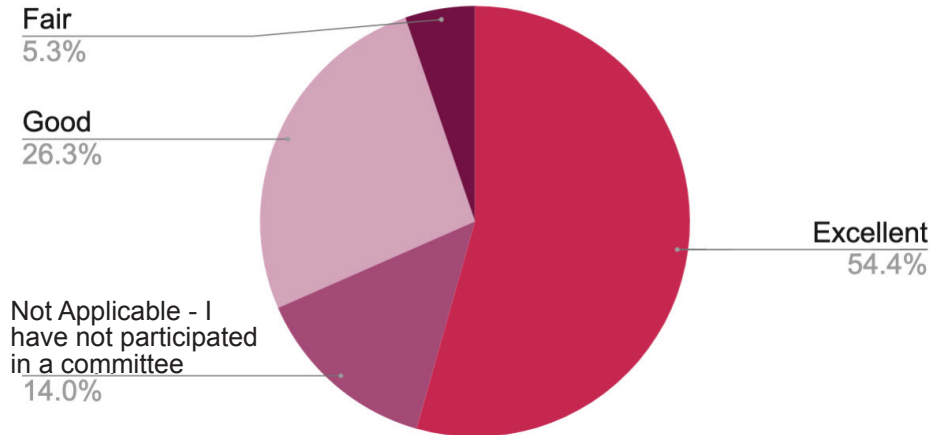
In terms of committee involvement, 86% of respondents have served on a committee, with 44% serving on the Board of Directors. The value of committee participation was highly rated with 82% sharing that participation was "good" or "excellent."

## Networking is the most appreciated membership benefit

Have you ever served on a committee?



How would you rate the value of that committee participation?



# Survey-Continued

The overall quality of member benefits was also highly rated, with 91% of respondents rating them as “good” or above.

When asked to rate the overall quality of specific member benefits, the highest rated benefit was “Networking Opportunities,” followed by “Participation on

	<b>Overall quality of membership</b>
Average Score (5-Excellent / 1-Poor)	<b>4.0</b> <b>Very Good</b>

Committees,” “Mentorship,” “CREW Network events,” “Participation on the Board of Directors,” and “Professional Development.”

The significant number response of “Don’t use but am aware of” was submitted for the following categories: “Leadership Training,” “Mentorship,” “CREWBiz Directory,” Career Outreach and Advancement,” “Nominations for Local and National Awards,” and “Done Deal announcement.” This indicates membership benefits that may require more effective encouragement.

	<b>Networking Opportunities</b>	<b>Participation on Committees</b>	<b>Mentorship (CREWmates - Mentor or Mentee)</b>	<b>Attendance at CREW Network events</b>	<b>Participation on the Board of Directors</b>	<b>Professional Development</b>
Average Score (5-Excellent / 1-Poor)	<b>4.2</b>	<b>4.0</b>	<b>3.9</b>	<b>3.7</b>	<b>3.7</b>	<b>3.7</b>
Don’t use but am aware of	<b>1.8%</b>	<b>8.8%</b>	<b>29.8%</b>	<b>8.8%</b>	<b>33.3%</b>	<b>10.5%</b>
Was not aware of	<b>0%</b>	<b>1.8%</b>	<b>0%</b>	<b>1.8%</b>	<b>3.5%</b>	<b>1.8%</b>

# Survey-Continued

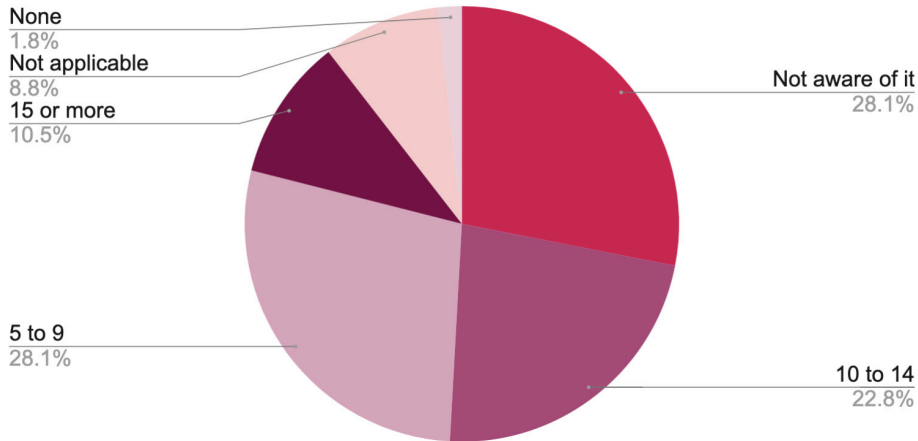
	<b>Leadership Training</b>	<b>Business Development</b>	<b>Nominations for Local and National Awards</b>	<b>Career Outreach and Advancement</b>	<b>CREWBiz Directory</b>	<b>Done Deal Announcements</b>
Average Score (5-Excellent / 1-Poor)	<b>3.6</b>	<b>3.6</b>	<b>3.5</b>	<b>3.4</b>	<b>3.3</b>	<b>3.3</b>
Don't use but am aware of	<b>21.1%</b>	10.5%	<b>19.3%</b>	<b>19.3%</b>	<b>24.6%</b>	<b>17.5%</b>
Was not aware of	<b>14%</b>	<b>1.8%</b>	<b>7.0%</b>	<b>14.0%</b>	<b>5.3%</b>	<b>7.0%</b>

# Survey-Continued

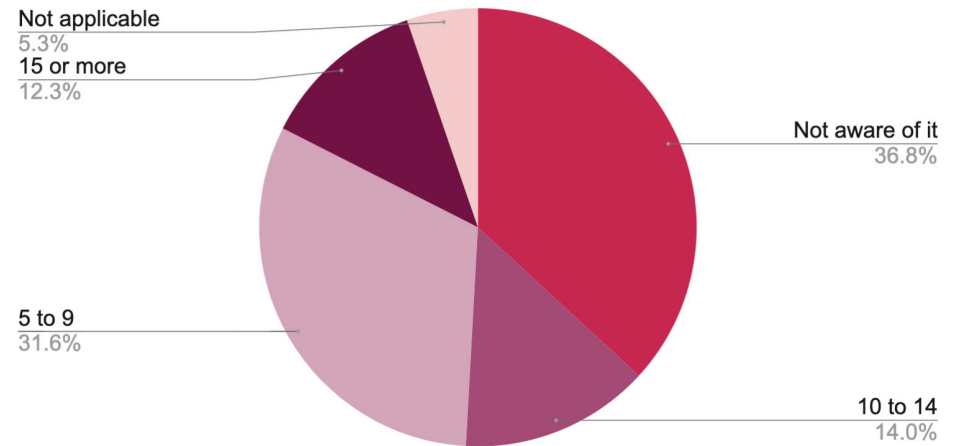
Overall event participation is strong, with 51% of respondents typically attending 5-14 events per year, either online or in-person (pre-Covid), and 28% attending 1-4 events annually. Those numbers dipped slightly in 2020, for members attending 5-14 events (46%) but increased for respondents attending 1-4 events annually (46%). And for how often respondents have deal-making conversations with other CREW San Diego members, the numbers were split, with 49% having conversations “occasionally” or “frequently” and 51% “seldom” or “never” having these conversations.

When asked which types of events they would like to see more of, the top three events that emerged were:

How many CREW San Diego events do you normally attend per year either online or in person (pre-COVID)?

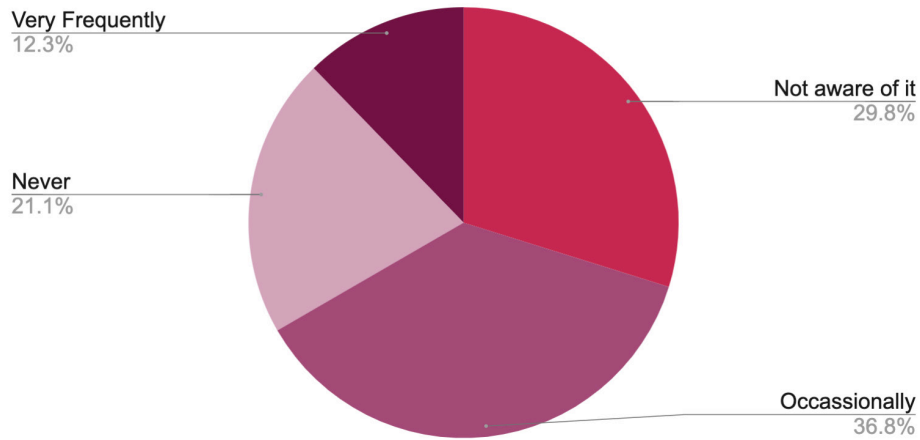


How many CREW San Diego events did you participate online or in person in 2020?

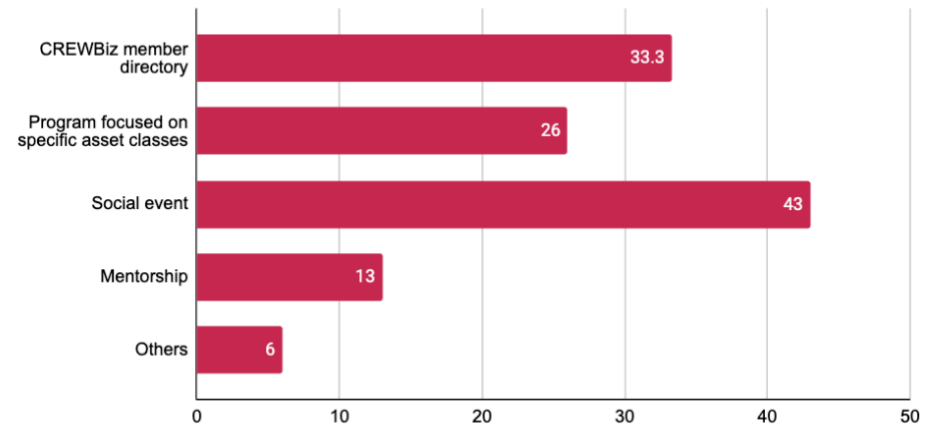


# Survey-Continued

How often do you have deal-making conversations with other CREW San Diego members?



Which tools provided by CREW San Diego do you find helpful for business development?

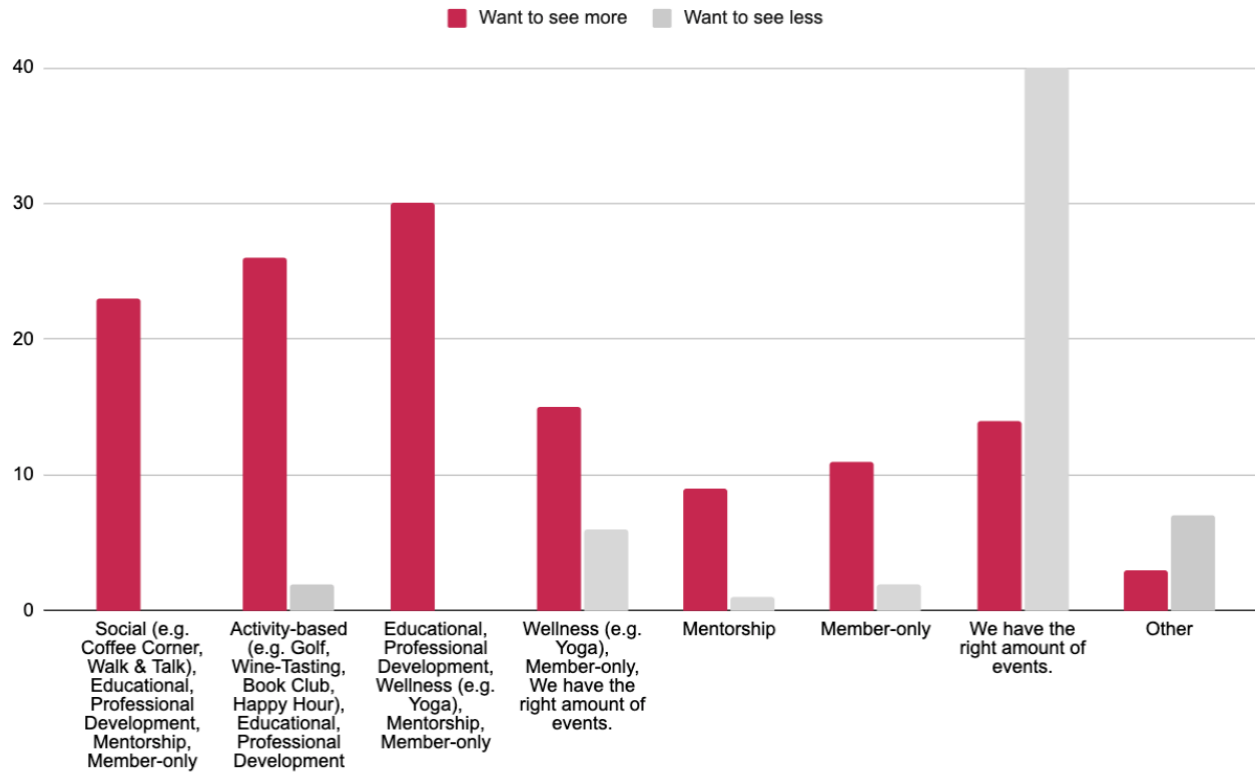


# Survey-Continued

- 1. Educational, Professional Development
- 2. Activity-based (e.g. Golf, wine club, book club, happy hour)
- 3. Social (e.g. Coffee Corner, Walk and Talk)

When asked if there should be any less types of events, the majority of respondents (80.7%) indicated they felt CREW San Diego provides the “right amount of events” or does not need to reduce any of existing events.

### Activity Preference





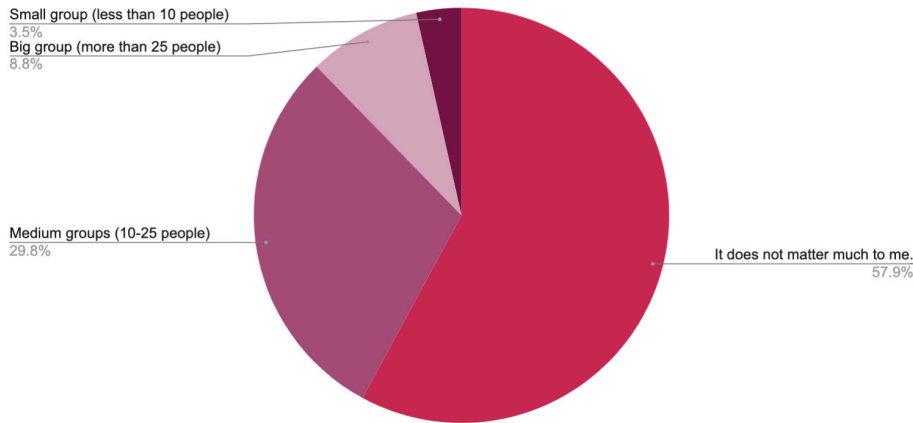
# Survey-Continued

## Members would like to see virtual events continue to be offered in addition to in person events

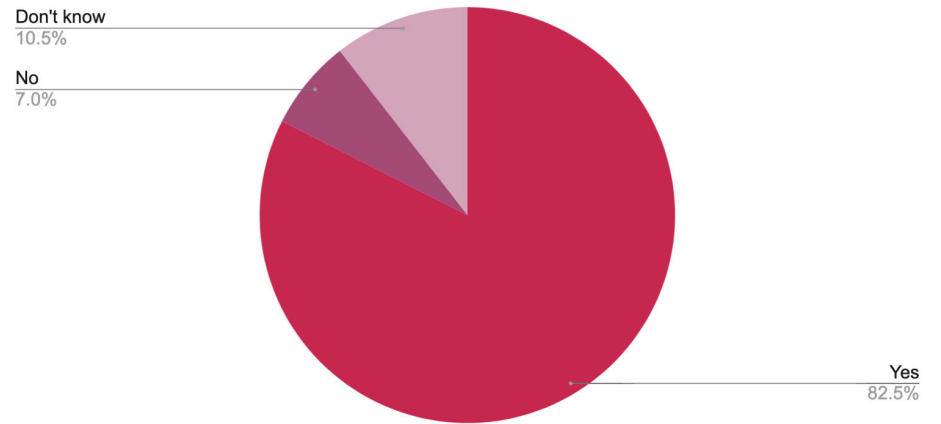
When asked if they have a preference for the size of event attended, 58% indicated size did not matter to them, while 30% shared that their preference was for medium-sized groups, 10-25 people. When asked if they would like virtual events to continue, once CREW San Diego is able to offer in-person events, the overwhelming majority (83%) said yes.

## Membership Composition

Do you have a preference for the size of the event you attend? (please exclude Covid-19 pandemic related issues when answering this question)



When CREW is able to offer in person events (subject to Covid-19 CDC and local guidelines), would you like to see virtual events continue to be offered in addition to in person events?



# Survey-Continued

Respondents were asked to rank how diverse CREW San Diego is based on four different groups: commercial real estate disciplines/fields, gender, work experience levels, and ethnicity/culture.

**Members value efforts to attract professionals from different specialties, expertise levels and ethnicity/cultural backgrounds.**

The results indicated that “work experience levels” and “commercial real estate disciplines/fields” demonstrated the most diversity, while “gender” and “ethnicity/culture” were the categories most lacking in diversity.

Respondents were then asked to rank how important diversity was in each of the four categories. The results showed the following order of importance:

1. Commercial real estate discipline/fields
2. Work experience levels
3. Ethnicity/culture
4. Gender

When asked if they would recommend CREW San Diego to a male colleague asking about professional organizations, 34% indicated they were “extremely” or “very” likely to recommend the organization, while 58% said they were “somewhat” or “not very” likely to do so.

	<b>Commercial</b>	<b>Participation on Committees</b>	<b>Mentorship (CREWmates - Mentor or Mentee)</b>	<b>Attendance at CREW Network events</b>	<b>Participation on the Board of Directors</b>	<b>Professional Development</b>
<b>Perception of Diversity Level</b> (5 – very diverse / 1 – not very diverse)	<b>3.5</b>	<b>1.9</b>	<b>3.8</b>	<b>2.4</b>	<b>3.7</b>	<b>3.7</b>
<b>Perception of Importance Level</b> (5- very Important / 1 – not very important)	<b>4.8</b>	<b>3.3</b>	<b>4.5</b>	<b>4.3</b>	<b>33.3%</b>	<b>10.5%</b>

## Sponsorship

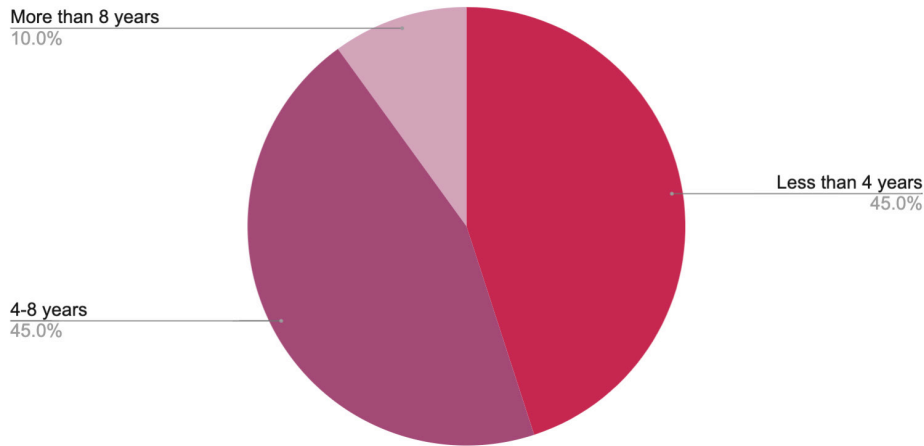
# Survey-Continued

Of the 57 respondents, 65% were sponsors (20 responses), with the “bronze” level of sponsorship being most represented (45%). When it came to total years being a sponsor for CREW San Diego, 45% had been a sponsor for less than 4 years; 45% for 4-8 years; and 10% for more than 8 years.

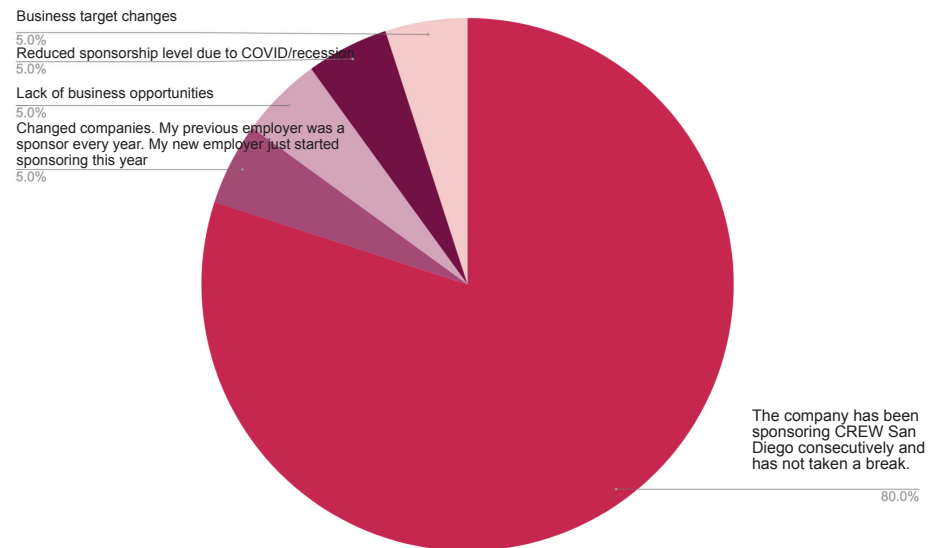
## Satisfying membership experience leads to sponsorship

When asked how they learned about sponsorship opportunities, the top two reasons attributed were, “sponsorship committee” (40%), and “by attending events as a CREW member” (35%). And the two biggest factors that motivated sponsorship were “CREW’s mission and dedication to elevate women in the CRE industry,”

How many years in total have you been a sponsor of CREW San Diego?



Has your company taken a break from sponsorship more than a year and resumed? If so, what was the main reason?



# Survey-Continued

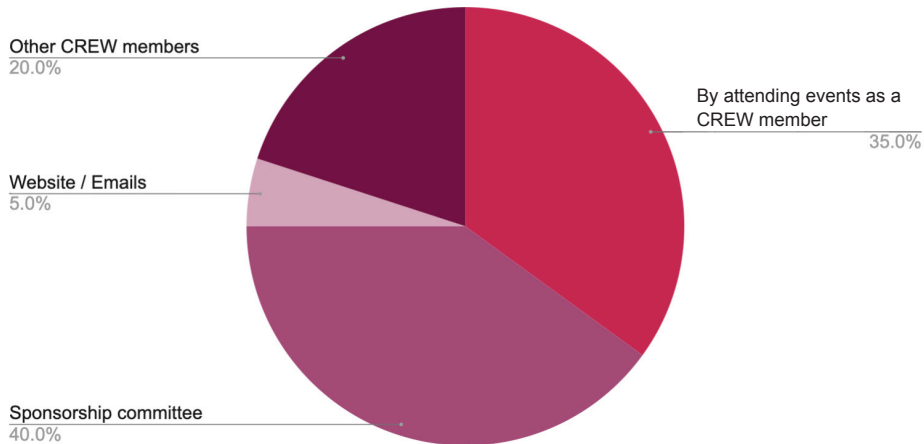
(50%) and “brand exposure” (30%). Most respondents had been sponsoring CREW San Diego consecutively for years (80%), without taking more than a year break.

Overall, the quality of CREW San Diego’s sponsor benefits were ranked as “good” or better by 70% of the respondents.

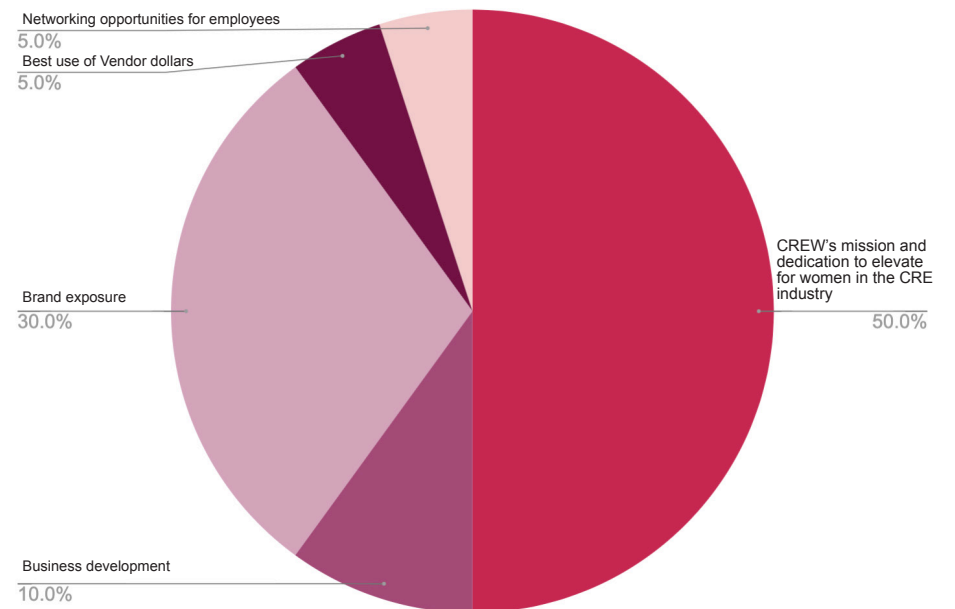
## Most appreciated sponsorship benefits are full membership and special event participation

When asked to rate the overall quality of each of the sponsor benefits, the highest ranked category was Individual CREW full membership, Sponsor Appreciation Event tickets, Golf Foursome with cart, and Special Events tickets.

How did you learn about sponsorship opportunities?



What is the biggest factor that motivated you/your company to become a sponsor?



# Survey-Continued

	<b>Overall quality of sponsorship</b>
Average Score (5-Excellent / 1-Poor)	<b>4.1</b> <b>Very Good</b>

	<b>Individual CREW full membership</b>	<b>Sponsor Appreciation Event tickets</b>	<b>Golf Foursome with cart</b>	<b>Special Event tickets</b>	<b>Lunch and Program tickets</b>	<b>Company logo on all CREW San Diego eblasts, the CREW San Diego website and all CREW San Diego emails</b>
Average Score (5-Excellent / 1-Poor)	<b>4.7</b>	<b>4.6</b>	<b>4.6</b>	<b>4.5</b>	<b>4.4</b>	<b>4.2</b>
Don't use but am aware of	<b>35.0%</b>	<b>1.8%</b>	<b>15.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
I am not aware of	<b>10.0%</b>	<b>0.0%</b>	<b>1.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.8%</b>

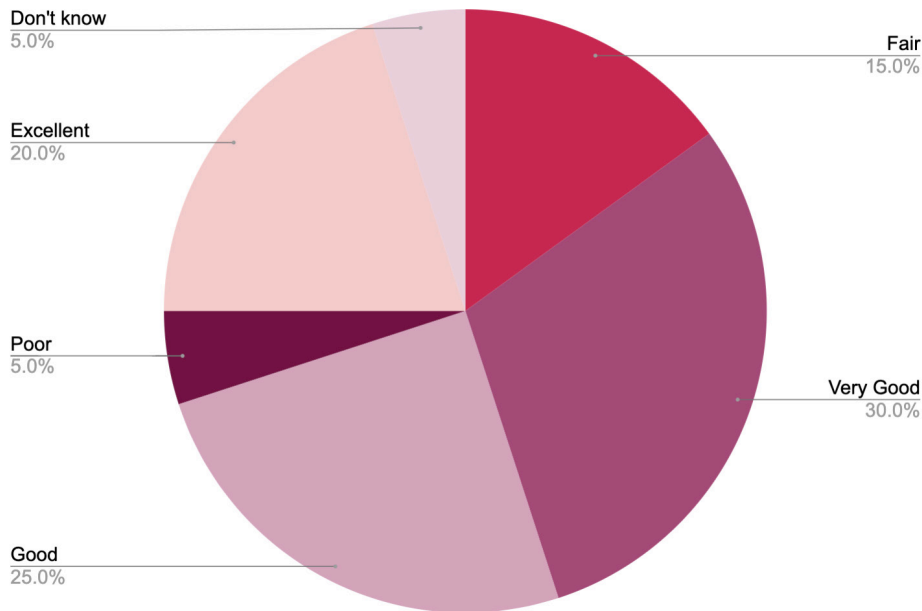
# Survey-Continued

	Highlight Company logo with website link on CREW email updates	Verbal and visual logo recognitions at all CREW San Diego programs/ events	Social media features - such as Sponsor Highlight and #thankyouthursday	Top priority showcasing company, people, office and/or projects at all programs	Top billing at all events	PowerPoint slides at each Program	Priority option to host chapter events
Average Score (5-Excellent / 1-Poor)	<b>4.1</b>	<b>3.9</b>	<b>3.9</b>	<b>3.9</b>	<b>3.8</b>	<b>3.6</b>	<b>3.2</b>
Don't use but am aware of	1.8%	0.0%	1.8%	1.8%	5.3%	5.3%	3.5%
I am not aware of	1.8%	0.0%	1.8%	1.8%	1.8%	0.0%	1.8%

# Survey-Continued

CREW San Diego's overall sponsorship impact in business development was rated highly, with a resounding 75% of respondents rating overall impact as "good," "very good," or "excellent." However, when asked to rate the overall impact of CREW San Diego's sponsorship in employee recruitment, 50% of the responses rated the impact as "good" or above, while 40% "didn't know."

How would you rate the overall impact of CREW San Diego's sponsorship in business development?



How would you rate the overall impact of CREW San Diego's sponsorship in employee recruitment?

