

Introduction and Background

The Strategic Framework that the Construction Management Association of America (CMAA) Board of Directors approved on April 8, 2022, is the basis for CMAA's FY23 Business Plan.

The new framework sets a mission, vision, and direction for the organization's future. It is a transformational expression of the association's historic purposes and looks to a future focused on project and program success, the growth and development of people as program and construction management professionals, and CMAA being the voice of the profession.

Within the new framework, core commitments remain. First and foremost, CMAA remains delivery-method neutral. Next, CMAA believes program and project success is more likely when program and construction management professionals participate at the earliest points in the project or program lifecycle. Finally, owner engagement is critical to the profession's continued growth and development.

Vision and Mission

Vision: CMAA is the voice of the program and construction management industry and the premier resource for professionals working in the built environment.

Mission: To promote, support, educate, and develop professionals who lead the delivery of programs and projects within the built environment.

Outcomes:

Outcome 1: Transform project execution. Project execution in the built environment has been transformed by the leadership of trained program and construction management professionals, resulting in optimal outcomes.

Outcome 2: Shape the profession.

- 2A: The program and construction management **profession** continuously evolves to attract and retain a diverse, qualified, and vibrant workforce prepared to lead successfully and responsibly throughout the project lifecycle.
- 2B: Program and construction management **professionals** are seen as highly qualified individuals who provide expert, innovative, and indispensable services across all the disciplines engaged throughout the project lifecycle.
- 2C: CMAA **members** are diverse, ethical, responsible individuals who understand and are prepared to address the global challenges facing the industry.

Outcome 3: Establish CMAA as the premier resource. CMAA is known as the premier program and construction management resource for professionals working in the built environment, making CMAA the recognized voice of the industry.

FY23: First Steps to the Future

Eight strategies deliver CMAA's Vision, Mission, and the three outcomes that the framework describes. Furthermore, specific tactics support each strategy. CMAA will execute these tactics in the next 12-18 months, but some tactics represent the early stages of their larger strategic initiatives.

The strategies are:

Outcome 1/Strategy 1 (O1/S1): Be the industry leader in leveraging leadership skills, technological innovations, digital tools, trends, and resiliency best practices to pave the way for innovative and successful project execution.



Outcome 1/Strategy 2 (O1/S2): Become the trusted source of knowledge and best practices in program and construction management.

Outcome 2/Strategy 3 (O2/S3): Promote, develop, and educate professionals to build and sustain teams and work cultures that are diverse, welcoming, and inclusive.

Outcome 2/Strategy 4 (O2/S4): Expand the program and construction management narrative and tell the stories of the roles, opportunities, breadth, and values of the profession.

Outcome 2/Strategy 5 (O2/S5): Offer professional development that is valuable to the recipient, is relevant to the evolving industry, is unique to the profession, and results in optimal project outcomes.

Outcome 3/Strategy 6 (O3/S6): Build brand awareness of CMAA resources and the program and construction management professionals who steward the entire project/program lifecycle.

Outcome 3/Strategy 7 (O3/S7): Actively engage with other industry groups.

Outcome 3/Strategy 8 (O3/S8): Actively engage with owners and owner organizations.

During the FY23 planning period, the CMAA staff team engaged in a top-to-bottom review of all programs, products, and services to determine whether and how they supported the new framework. Next, they reviewed the suggested tactics that the Board identified during the framework's design phase.

The FY23 plan represents the results of their creative and conceptual thinking about the organization's potential and how to drive success for each outcome. The specific tactics to support each strategy are listed without a reference to a specific staff team and should take place over the next 12-18 months. Some of these tactics represent the early stages of their larger strategies. They include both new initiatives (listed first in **bold**) and ongoing, "bread and butter" projects.

The systems and operational activities that support CMAA's success remain part of the overall workplan for FY23 although they are not highlighted in this document.

Collectively, the FY23 Business Plan represents CMAA's ongoing commitment to high-value activities that support member and organizational success.

1. Transform Project Execution

O1/S1: Industry leader in best practices

- **2023 publications: Technology Management Guidelines, CM/PM Fees, Risk Management Guidelines, CMAA Trailers**
- **Launch CACM**
- **Launch CCM Build Up**
- **Develop and offer new courses (in-person and online): ethics, proposal writing, risk management**
- **Revise online PCM course**
- **Member Spotlights (see also O2/S4)**
- **Maintain existing credentials: CCM, CMIT Stackable Credentials**
- **Maintain existing courses: PCM, Principles of CM (formerly Capstone), Train the Trainer**
- **Maintain online modules**
- **Select conference sessions with rigor and attention to member needs and Strategy 05**

O1/S2: Trusted source of knowledge

- **2023 publications (see also O1/S1)**
- **Task Force on ESG for CMAA (see New Initiatives)**
- **Develop and offer new courses (see also O1/S1)**
- **Maintain ANAB accreditation for CCM credential**
- **Monitor and review ABET program-specific criteria**
- **Update CMCI exams as needed**
- **Sustain course licensing program**
- **Continue Renewal Point Provider service**
- **Sustain Job Board**
- **Marketing communications/informational communications**



2. Shape the Profession

O2/S3: Promote, develop, and educate professionals to build and sustain teams and work cultures that are diverse, welcoming, and inclusive

- **Develop and offer ethics course (in-person)**
- **Re-establish CMAA Instagram (see also O2/S4)**
- **Conduct first Leadership Summit**
- **Conduct and expand DEIB leadership training**
- **Align individual awards and recognition w/ Framework Outcomes**
- Conference ed session selection
- Continue webinars
- Continue podcast
- Maintain/grow informational communications

O2/S4: Expand the narrative

- **Propose content from CMAA SMEs to industry publications**
- **Capture and share content on chapter activities**
- **Spotlight (video, written, graphics) members and projects**
- **Re-establish CMAA Instagram**
- **Establish strategy for increasing engagement with HUBs**
- **Task Force on the Statement of Values**
- **Task Force on International Expansion**
- **Implement new membership structure**
- **Increase women and persons from underrepresented groups in course instructor pool**
- Continue podcast
- Maintain/grow informational communications
- Maintain/grow external communications (PR)
- Continue to develop advocacy initiative

O2/S5: Deliver valuable professional development

- **2023 publications (see also O1/S1)**
- **Revise online PCM course (see also O1/S1)**
- **CACM practice exam**
- **Update CCM practice exam**
- **Credentials/CMCI (see also O1/S1)**
- **Courses (in-person and online) (see also O1/S1)**
- Continue webinars
- Continue Leadership Library
- Continue podcast
- **Conduct 2nd Emerging Leaders Program**
- **Produce three annual in-person conferences**

3. Establish CMAA as the Premier Resource

O3/S6: Build brand awareness

- **Increase chapter visit commitment to every chapter every year**
- Continue podcast
- Monitor and review ABET program-specific criteria
- Sustain Job Board
- Exhibit with other organizations (e.g., SAME, NAWIC, Army Engineer Week, etc.)
- Expand pool of potential mega members
- Maintain/grow marketing communications

O3/S7: Engage with industry groups

- Engage partner organizations for Focus23 education sessions
- Sustain Job Board
- Recruit members through attendance at events (e.g., NAWIC, AHSE, AAAE, SAME, etc.)
- Promote sponsorship and advertising opportunities
- Maintain/grow informational communications
- Maintain/develop advocacy-based relationships

O3/S8: Engage with owners

- **Propose education sessions offered by CMAA SMEs to other events (e.g., AAAE, IPI, AASHTO, etc.)**
- **Propose articles by SMEs (see O2/S4)**
- Exhibit and attend owner organization events (e.g., AHSE, AAAE, SAME, etc.)
- Maintain/grow informational communications
- Maintain/grow external communications (PR)
- Advance relationships with NAVFAC and USACE

FY23 New Initiatives

Leadership Summit (Strategic Investment) (Outcome 2/Strategy 3)

Volunteers are crucial to achieving CMAA's Vision and Mission. CMAA seeks to expand the existing training programs for CMAA volunteers by adding an annual volunteer leadership summit to the schedule of association-supported events. During the first four years, a strategic investment from CMAA's cash reserves would support the summit.

The estimated investment from cash reserves is \$650,000 over **two** years. CMAA would not have to withdraw funds from the CMAA investment account.

The summit supports O2/S3: "promote, develop, and educate professionals to build and sustain teams and work cultures that are diverse, welcoming, and inclusive."

The summit's intended outcomes are:

- Develop leaders for the association;
- Strengthen connections between national objectives and chapter activities;
- Build trust and strengthen relationships between volunteers and staff;
- Broadly disseminate information and messages to the chapter network; and
- Develop skills that participants can use to support their growth as leaders within their organizations.

Currently, CMAA has approximately 250 active volunteers serving in various "volunteer groups," including on the Board of Directors, in committees (10), on chapter boards (30), and in various ad hoc positions (e.g., content creator or ABET PEV). Each role has specific eligibility, knowledge, and time requirements.

In 2020, a CMAA staff task group reviewed CMAA's volunteer management activities and proposed steps to improve the experience for both volunteers and staff. Key among their recommendations was to invest in introductory and ongoing training experiences, particularly for those serving on national boards, committees, and task forces, and for those serving as leaders in CMAA's 30 regional chapters.

Over the past three years, CMAA has made the following investments in volunteer education:

- Onboarding programs for the national Board of Directors, the Board of Governors, and the Foundation Board of Directors;
- Orientation meetings for all national committees that address the committee's charge(s), links to the strategic plan or framework, metrics, and logistics; and
- A series of videos for chapter leaders addressing foundational topics in association management.

CMAA envisions the summit as a by-invitation-only event for the following groups:

CMAA Board of Directors;

CMAA Foundation Board of Directors;

CMCI Board of Governors;

Members of national committees and task forces who are not also members of the above-listed Boards; and

Chapter Presidents and Presidents-elect (Over time, this may shift to chapter Presidents-elect and one additional chapter officer).

For the first two years, CMAA would subsidize travel and lodging for chapter leaders. Eventually, the subsidy would reduce to a stipend or grant. CMAA would cover event meals, meeting rooms, A/V, and program materials.

The program would include the following elements:

General Sessions: These would include an update from the chair and other officers on the “state of the association,” as well as a speaker on leadership, emotional intelligence, or workplace culture.

Education Sessions: These would focus on association management topics (e.g., use of social media, DEIB programs, advocacy, succession planning, strategic planning, governance, and financial management) and case studies solicited from chapters on unique programs or initiatives. Each session would run twice so that as many attendees as possible could participate.

Meetings: All boards, national committees, and task forces would have an opportunity for an in-person meeting and chapter officers would meet as a group.

Social events: In addition to an opening reception and other meal events, the event could conclude with a social activity on the second night for those staying over (e.g., attending a local sporting event).

The summit would occur in the same location for multiple years before relocating to a new venue.

Task Force on Statement of Values (Outcome 2/Strategy 4)

This task force will be charged with reviewing the CMAA Statement of Values to ensure they are aligned with the new Vision and Mission statements. The task force is expected to provide a first draft, as needed, at the March 2023 Board of Directors meeting with a final draft presented for approval in October 2023.

Task Force on ESG for CMAA (Outcome 1/Strategy 2)

The charges of this task force are:

1. To identify ESG issues that are important (or likely to become important) to members; and
2. To identify ESG goals and commitments for CMAA.

The task force will provide a report to the Board with recommendations on each item.

“ESG” stands for Environmental, Social, and Governance. Investors are increasingly using these non-financial factors regarding a company’s behavior in addition to its financial performance to analyze investment risks and opportunities. However, the concept of assessing a company’s ESG commitments extends beyond the investment world. Owners can express their corporate ESG commitments through their engagements with vendors, contractors, and consultants, who in turn can have their own ESG commitments.

There are a variety of ways to express these commitments, including:

Environmental: How does a company safeguard the environment? How is it addressing climate change?

Social: How does a company manage relationships with its employees, suppliers, customers, and the communities where it operates? What are its commitments to social justice or DEIB?

Governance: What is a company’s position on executive pay, audit, internal controls, transparency, and stakeholder or shareholder representation?

Outcome 2C calls on CMAA to develop “**members** who are diverse, ethical, responsible individuals who understand and are prepared to address the global challenges facing the industry.”

In response to their recommendations for the first charge, CMAA will develop educational content on ESG topics that responds to members' needs. In response to the second charge, the task force will draft a new section of the CMAA Policy Framework that identifies CMAA's ESG commitments and goals.

Task Force on International Expansion (Outcome 2/Strategy 4)

During the development of the Strategic Framework, the Board mentioned international expansion for membership and CMAA credentials as a potential tactic for both Outcomes 1 and 2.

International expansion by U.S.-based associations requires significant planning, strategic thought, and early assessment. Further, associations are advised to approach this topic methodically on a country-by-country basis.

This task force's charge is two-fold.

1. Identify CMAA's strengths, weaknesses, opportunities, and threats with respect to expanding membership, credentialing, and professional development globally.
2. Develop a top-level action plan for international expansion over the next two-to-five years. The plan should focus on the critical legal, financial, and governance areas for this initiative and the general questions to resolve, not specific, task-based courses of action.

The task force will provide a report to the Board addressing each charge and providing recommendations.

The Board will review the task force's recommendations in October 2023. The business planning for FY24 will incorporate any decision regarding the next steps.

Conclusion

To prepare the FY23 plan, the staff worked creatively and collaboratively to identify the activities most likely to drive the organization toward achieving the outcomes and strategies.

Targets and metrics correlate to the FY23 dashboard (attached). The dashboard is a fresh start and does not include tactics or activities from previous years. The Executive Committee and staff will receive the dashboard monthly, and the Board will receive it at each meeting.