



## Introduction and Background

The FY24 business plan for the Construction Management Association of American (CMAA) is grounded in the Strategic Framework approved by the CMAA Board of Directors on April 8, 2022.

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

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

## 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 life cycle.
- 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 life cycle.
- 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.

## FY24: Plan the Work; Work the Plan

CMAA’s vision and mission, along with the three outcomes described in the framework, are delivered through eight strategies, each of which is supported by specific tactics several of which were initiated in FY23, others which can be delivered in the next 12 months, while others represent the early stages of larger 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 (O2/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, relevant to the evolving industry, 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 life cycle.

**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.

In advance of the FY24 planning period, the CMAA staff team engaged in learning activities to expand their knowledge of diversity, equity, inclusion, and belonging (DEIB) strategies and programs, as well as their annual review of programs, products, and services to determine whether any adjustments were needed or new programs to introduce. They also had the benefit of an early review of the reports by the two FY23 task forces: International Expansion, and ESG for CMAA. Finally, they reviewed metrics and progress on programs and initiatives from FY23.

The FY24 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 reference to a specific staff team and are expected to take place over the next 12-18 months. They include both new initiatives (listed first in **blue**) and ongoing, "bread and butter" projects. Although not listed explicitly, all activities are supported by investments in systems and operational excellence.

Collectively, the FY24 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

- 2024 Publications: Risk Management, Time Management  
CM/PM in Delivery Methods publication (see new initiatives)
- Offer new courses (in person and online): ethics, proposal writing, risk management
- Implement professional development recommendations from Task Force on ESG for CMAA
- Member Spotlights (see O2/S4)
- Maintain existing credentials: CCM, CACM, CMIT Stackable Credentials
- Maintain existing courses: PCM, Principles of CM, Train the Trainer, and CCM Build Up
- Maintain online modules
- Select conference sessions with rigor and attention to member needs

### O1/S2: Trusted Source of Knowledge

- 2024 Publications (see O1/S1)
- Offer new courses (see O1/S1)
- Join ACCE to expand participation in postsecondary education and contribute to program criteria
- Working Group on PM/CM roles in delivery methods
- Maintain ANAB accreditation for CMCI credentials
- 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

- Offer ethics course
- Conduct and expand DEIB Leadership Training
- Member Resource Groups (see new initiatives)
- Translate at least two publications into Spanish
- Conduct annual Leadership Summit
- Conference Ed Sessions
- Continue webinars
- Continue podcast
- Maintain/grow informational communications

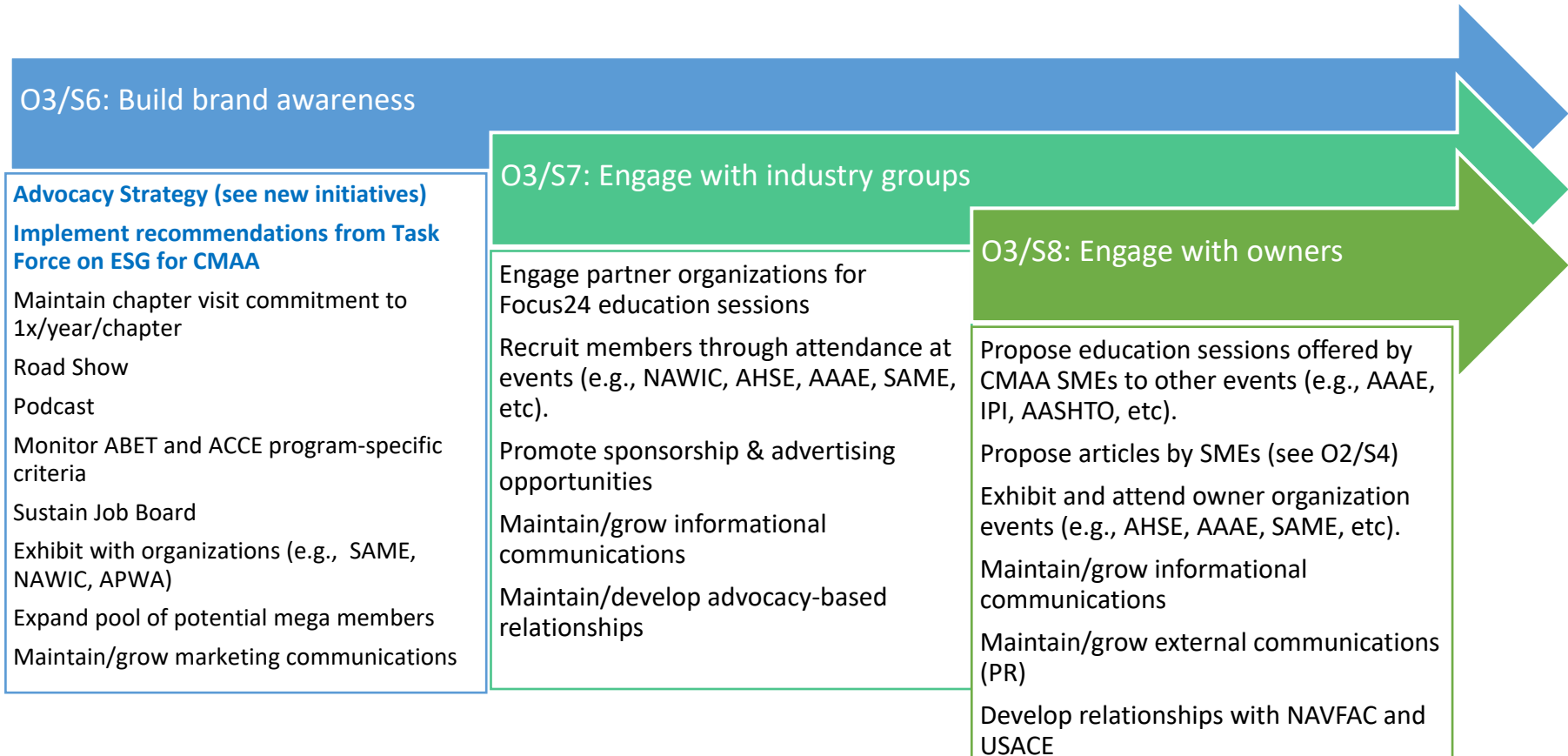
O2/S4: Expand the narrative

- Implement recommendations from Task Force on International Expansion
- Working Group on International Strategy
- Propose content from CMAA member SMEs to industry publications
- Capture and share content on Chapter activities
- Spotlight (video, written, graphics) members and projects
- Establish strategy for increasing engagement with HUBs
- 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

O3/S5: Deliver valuable professional development

- 2024 Publications (see O1/S1)
- Implement PD recommendations from ESG Task Force
- Credentials/CMCI (see O1/S1):
- Courses (In-Person and Online) (see O1/S1):
- Continue webinars
- Continue Leadership Library
- Season 3 of podcast
- Conduct 2nd Emerging Leaders Program
- Produce two annual in-person conferences

### 3. Establish CMAA as the Premier Resource



**FY24 New Initiatives****Advocacy for the Profession (Strategic Investment) (O3/S6)**

CMAA's Strategic Framework challenges the organization to become the voice of the program and construction management industry and the premier resource for professionals working in the built environment. Standing on the foundation of CMAA's success over the last 40 years, while looking to the future, the organization must accelerate its development as an advocate for the profession and the industry.

CMAA's advocacy initiative launched in 2023 under the leadership of the Government Advocacy Committee. The next step is to support that initiative and expand its scope by adding resources primarily in the form of experienced staff and, as needed, consultants.

This initiative will be funded as a strategic investment of reserves for the first two years with the expectation that it will be absorbed into the annual budget beginning in FY26.

CMAA's advocacy will be rooted in the practices of indirect, or grassroots, advocacy. Direct advocacy may be added to the portfolio if it becomes appropriate to do so. The objectives are focused on the following:

- To present CMAA members as constituents who are a trusted source of knowledge and best practices in program and construction management.
- To demonstrate the breadth of the program and construction management narrative and tell the stories of the roles, opportunities, breadth, and values of the profession.
- To build brand awareness of CMAA resources and the program and construction management professionals who steward the entire project/program lifecycle.
- To promote the value of credentials to professionals, particularly those working on high-value, federally funded programs, or projects.
- To establish a preference or requirement for engaging CCMs and CACMs on federally funded projects or programs above a certain dollar value.
- To establish a professional classification (0820) within the federal civil service for program and construction managers.
- To protect Qualifications-Based-Selection (QBS) for program and construction management services under the terms of the Brooks Act.
- To engage with coalitions of associations to address issues and policy decisions of common interest or concern.

To be successful, CMAA will invest in at least one, full-time, staff person whose responsibilities will include, but are not limited to:

- Monitoring federal legislation, policy, and regulatory activities for issues related to program and construction management.
- Developing and implementing campaigns in support of CMAA positions on legislation and regulatory activity.
- Developing and implementing training and education for volunteers engaged in grassroots advocacy activities for CMAA.
- Maintaining relationships with CMAA chapters and other architecture, engineering, and construction (AEC) industry groups; building relationships in the AEC advocacy field, with a focus on the federal level.

- Planning for the annual Hill Day event, including working with colleagues across the association to provide registration, scheduling Hill meetings, preparing Hill packets and talking points, preparing presentations on policy issues that affect CMAA members.

This staff person may be supplemented with consultant services as needed. The initiative will be managed and directed by the CEO; oversight will be the responsibility of the Government Advocacy Committee, on behalf of the Board.

**Join the American Council for Construction Education (ACCE) (O1/S1; O3/S7)**

The American Council for Construction Education (ACCE) is a specialized and programmatic accrediting agency for construction education, including construction and program management. It functions in a manner similar to ABET, however its focus is on construction education including construction and program management.

The Executive Committee has approved a motion to join ACCE as a sustaining association member, while maintaining CMAA's current membership and participation in ABET.

CMAA was a Sustaining Association Member from 2004-2015.

The council accredits bachelor's, master's, and associate degree programs at 99 colleges and universities. It is recognized by the Council for Higher Education Accreditation (CHEA). CHEA confers recognition on specialized and programmatic accrediting agencies as an indicator of the quality and consistency of their processes and governance.

Membership in ACCE does not pose a conflict of interest for CMAA with ABET. Membership in both organizations is beneficial to CMAA and to postsecondary institutions. CMAA will need to ensure that its organizational representative is not currently serving in the ABET governance system.

**Member Resource Groups (O2/S3)**

The Committee on Diversity, Equity, and Inclusion (CODE) has spent 2023 investigating the creation of Member Resource Groups (MRGs) for CMAA and has submitted a proposal for creating them (see attached).

MRGs are defined as networks of CMAA members that form based on shared characteristics or backgrounds and are sponsored by CMAA. MRG members would share common needs in the association and workplace. Membership in any MRG is open to any member to foster allyship; each MRG would have an advisor who is also a voting director of the CMAA Board of Directors.

Groups would, initially, focus on professional development, mentoring, and providing feedback to the CMAA volunteer leadership.

As groups develop and mature, they have the potential to become a valuable resource to CMAA providing information about their identities, opening new networks for recruiting, supporting CMAA's strategic direction, and serving as a visible sign of CMAA's commitment to a diverse and inclusive organization. Groups would advocate for themselves through a governance structure supported by the DEIB Committee (formerly CODE) and the CMAA Board of Directors.

**Working Group on International Strategy (O2/S4)**

Using the 2023 Task Force on International Expansion (TFIE) report as a starting point, the working group's charge is to design a strategy for international engagement that advances the objectives in the strategic framework with a focus on the following:

- CMAA as the trusted source of knowledge and best practices in program and construction management.
- Promote, develop, and educate professionals to build and sustain teams and work cultures that are diverse, welcoming, and inclusive.
- Expand the Program and Construction Management narrative and tell the stories of the roles, opportunities, breadth, and values of the profession.
- Offering professional development that is valuable to the recipient, relevant to the evolving industry, unique to the profession, and results in optimal project outcomes.
- Building brand awareness of CMAA resources and the program and construction management professionals who steward the entire project life cycle.
- Engaging with other, related industry groups in other countries.

The working group is composed of key committee chairs, members of the TFIE, and former members of the Board of Governors. It is chaired by the Treasurer. The deliverable is a strategic plan that complements or supplements the Strategic Framework, including metrics and targets for achieving these outcomes.

**Working Group on Roles and Responsibilities in Delivery Methods (O1/S1)**

For too long, the role of program and construction management professionals in delivery methods, other than design-bid-build, has been poorly understood and marginalized.

This working group, using a format refined by the Standards of Practice Committee, will define these roles across the spectrum of delivery methods and prepare guidelines for owners and service providers that articulates the role and responsibilities of PM/CM professionals in each type of delivery method. This will position CMAA to effectively champion the profession across the industry.

The working group is chaired by a Voting Director and includes individuals from a range of owners and service providers.

**Conclusion**

To prepare the FY24 plan, the staff worked creatively and collaboratively to identify the activities most likely to drive the organization toward achieving the outcomes and strategies.

It is not unexpected that many of the FY24 activities look familiar to those from prior years. Many are based on initiatives that started prior to 2022; others are the “bread-and-butter” of delivering CMAA’s mission. This is intentional.

Over the last six years, CMAA’s success has rested on a commitment to consistently increasing the quality and value of the programs, products, and services we offer to our members and others, even as we add or adjust our offerings. This focus on quality has strengthened CMAA and positioned the organization to increase its footprint within the AEC association community by adding advocacy without diminishing the organization’s historic core: professional development, credentials, and engagement.





**Appendices**

DEIB Committee (CODE) Proposal for Member Resource Groups

Dashboard for FY24<sup>1</sup>

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<sup>1</sup> Targets and metrics are captured on the FY24 dashboard. The dashboard includes tactics or activities from previous years only where those activities extend into FY24. The Board reviews it at each meeting or briefing.

CMAA Strategic Framework Dashboard

	Tactic or Activity	Strategy	Target		Baseline (1/1/24)	FY24 (as of [date])	FY25	Status
			Date (by when?)	Metric (how many, how much, etc.)				
<b>Outcome 1: Transform Project Execution</b>								
<b>Outcome 1:</b> 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.	2024 Publications: Risk Management	S1, S5	12/31/2024	600 copies sold				
	2024 Publications: Time Management	S1, S5	12/31/2024	250 copies sold				
	2024 Publications: Delivery Method (Working Group)	S1, S5	12/31/2024	150 copies in 2024				
	2024 Publications: CMAA Trailers	S1, S5	12/31/2024	1 per month				
	New course: Ethics	S1	4/1/2024	30 attendees				
	New course: Proposal writing	S1	11/1/2024	20 attendees				
	New course: Risk	S1	11/1/2024	40 attendees				
	Select conference ed sessions that meet S4 expectations: Focus24	S1, S4	4/1/2024					
	Select conference ed sessions that meet S4 expectations: CMAA2024	S1, S4	11/1/2024					
Working Group on Roles and Responsibilities in Delivery Methods	S2	12/31/2024	Published by 10/26/24					
<b>Outcome 2: Shape the Profession</b>								
<b>2A:</b> 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 life cycle. <b>2B:</b> 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 life cycle. <b>2C:</b> CMAA members are diverse, ethical, responsible individuals who understand and are prepared to address the global challenges facing the industry.	Launch Advocacy Initiative	S3, S4	12/31/2024	GAC deliverable; strategy				
	Conduct 2nd annual Leadership Summit	S3	7/1/2024	Summit conducted; positive evaluations	2023 evals were positive; recommendations for adjustments being implemented in 2024			
	Conduct and expand DEIB leadership training to Chapter leaders	S3	12/31/2024	Program extended to staff & Chapter Leaders	30 participants in annual chapter leaders call; 30 participants in LS ed session			
	[Re]-align individual honors and recognition with framework	S3	7/1/2024	Submissions in each category; honorees selected in each category	N/A			
	Continue to implement DEIB Workplan (see next page dashboard)	S3, S4	12/31/2024	See dashboard				
	Propose content from CMAA SMEs to industry publications	S4, S7, S8	12/31/2024	6 proposals; 1 accepted				
	Capture and share content on Chapter activities	S4	12/31/2024	1/mo	TBD			
	Establish strategy for increasing engagement with HUBs	S4	12/31/2024	Increase # of members who self-identify as employed by or members of HUBs that attend one CMAA program	Previously un-measured			
	Engage partner organizations for F24	S7	4/1/2024	3 organizations	Organizations identified			
	International Strategy Working Group (ISWG)	S4	10/26/2024	Report & recommendations discussed and voted on at 10/24 BoD Mtg	See TFIE Report from 10/28/2023			
Increase women and persons from underrepresented groups in instructor pool (both PCM and other courses)	S4	12/31/2024	25% of instructors are from under represented member groups	20%				
Road Show sessions/presentations	S4	12/31/2024	6 presentations	2 in 2023 (started after 7/1/23)				
<b>Outcome 3: Establish/Promote CMAA as the Premiere Resource</b>								
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.	Visit/engage with every chapter 1x/year	S6	12/31/2024	29 visits by staff or volunteer leaders	17 completed in FY23			
	Propose education sessions offered by CMAA SMEs to owner events (e.g., COAA)	S8	12/31/2024	8 proposals; 2 accepted				
	Exhibit and attend owner organization events	S8	12/31/2024	8 conferences attended/exhibited at				
	Implement organizational recommendations from ESG Task Force	S8	12/31/2024	See p. 3	New			

Diversity, Equity, Inclusion, and Belonging (DEIB) Workplan FY23-FY24

Objective	Activity	Deadline (by when)	Important Interim Steps (as of 10/1/23)	Progress/Comment (as of 12/5/23)
Demonstrate organizational commitment to DEIB	Continue commitment to CEO's Action Plan*	12/31/2024		Measured through periodic reporting to CEO Action Plan team
	Continue to promote AGC Culture of Care to members	12/31/2024		Measured through periodic reporting by Member Engagement team on messaging
	Align the purposes and descriptions of CMAA's honors and awards with Outcome 2 (S4)*	2/2/2023	New text approved by ExCom 1/24/23	ExCom requested revisions and consolidation; proposal ready for review by ExCom and Board
	Engage with related professional organizations (S7)*	12/31/2024		CMAA participating in NIBS Round Table on Social Equity; NIBS social equity survey 2023
	Use marketing and communications channels to highlight the diversity of CMAA's membership*	12/31/2024	Launch of new testimonial/story collection tool	Video collection tool has launched.
	Revise all publications (on the planned schedule) to use language that avoids bias toward a particular sex or gender	Ongoing		The SOP Cmte has an established schedule for revising CMAA publications; this effort will be ongoing for several years
	Evaluate CMCI exams for implicit bias	12/31/2024	Will budget in FY24 for psychometric services/analysis	
	Revise CMCI exams item banks to use language that avoids bias toward a particular sex or gender	12/31/2024	Item writing sessions in March and Oct 2023	
Increase engagement in CMAA by individuals from historically underrepresented groups	Increase psychological safety at events through protocols for event set up, menus, and expectations for behavior*	12/31/2024	Ongoing	
	Monitor and address activities that can isolate or exclude people at events	12/31/2024	Ongoing	
	Establish "member resource groups" within CMAA	12/31/2023	DEBI Cmte (CODE) and staff plan developed; goes to Board 12/7/23 for implementation in 2024	
	Establish protocols for using gender-neutral language in speeches, publications, and at meetings and events	3/17/2023	First review in F23 scripts	Style Guide revision and education as needed.
	Establish protocols for avoiding (or removing) microaggressive language in speeches and publications (e.g., jobsite vs field; trade partners v subs	3/17/2023	First review in F23 scripts	Style Guide revision and education as needed.
Build Chapters' capacity to include DEIB education in chapter activities	Provide DEIB education @ Leadership Summit*	7/1/2024	1st session offered in 2023	Recommend assigning to ELP alumni +DEIB Cmte for 2024
	Develop "toolbox" resources for chapters	7/1/2024	Assigned to DEIB Cmte for 2024	
	Develop handbook resources for chapters	12/31/2024		
	Mentor chapter leaders on DEIB	12/31/2024	2023 Chapter leaders DEIB call	
Develop a cohort of inclusive leaders for the profession	Incorporate DEIB into ethics curriculum*	6/1/2024	Delayed in FY23	
	Create course(s) on DEIB and DEIB leadership	7/1/2024		
	Introduce best practices and lessons learned for successful community engagement (NOTE: this may be expanded into a guidelines publication on the topic using the existing protocols and processes established by SOP)	7/1/2024		
Reduce barriers to the profession for non-English speakers	Identify potential market for non-English speakers for CMCI credentials	12/31/2023	Publications identified; translation begins in 4Q of FY23	
	Identify CMAA publications and courses to be translated into Spanish	7/1/2024	Publications identified; translation begins in 4Q of FY23	
Engage CMAA members employed by historically underutilized businesses	Identify education and learning needs of CMAA-member HUBs*	6/1/2023	Survey complete; results need further evaluation by DEIB Cmte	
	Provide initial education program/session at CMAA2023	11/1/2024	PP'd to 2024	
Reinforce importance of DEIB skills in professional practice	Add DEIB content to CMCI examinations	TBD	BoG manages this process	Based on timing of next JTA
	Add DEIB education requirement for CMCI recertification	TBD	BOG manages this process	

ESG Commitments

<b>CMAA's Organizational ESG Commitments</b>	<b>Baseline (1/1/24)</b>	<b>Progress to date [insert date]</b>
<b>Environmental</b>		
Work with conference venues to support their goals for reducing waste and environmental impact *	Ongoing	
Make decisions about handouts and other give-away items with a view toward reducing waste *	Ongoing	
Continue to support a fully remote CMAA staff work environment*	Ongoing	
Purchase carbon-offsets for CMAA staff travel to CMAA-hosted staff development events	New	
<b>Social</b>		
Identify historically underutilized businesses (HUBs) for providing services to the association including but not limited to accounting, legal, IT, and HR	New	
Provide DEIB education to staff*	Ongoing	
Identify potential market for non-English speakers for CMCI credentials *	Ongoing	
Promote AGC Culture of Care *	Ongoing	
Increase psychological safety at events through protocols for event set up, menus, and expectations for behavior*	Ongoing	
Conduct regular third-party review of compensation to ensure staff are paid appropriately for their positions, time in service, and locations	New	
Provide employee benefits that are meaningful to the individual and relevant to their phase of life	Ongoing	
Promote community engagement by staff in activities and initiatives that have value to them as individuals	New	
Recruit diverse speakers and instructors for CMAA courses and programs *	Ongoing	
<b>Governance</b>		
Post 990s on public webpage.	Complete for 2022 Audit	
Post Board of Directors meeting minutes on public webpage	New	
Post approved budget and quarterly financial statements on public webpage	New	
Transparent director selection process for association Board, foundation Board, and CMCI Board of Governors*	Ongoing	
Conduct an annual, financial audit by an independent third party *	Complete for 2022 Audit	
Annually review investment performance and investment manager performance *	Ongoing	
Provide annual ethics training to staff.	New	

**FY24 Business Plan Dashboard**

**Quantitative Markers for FY24**

		FY23 (11/21/2023)	FY24 Goal	As of [date] (progress update)
<b>Credentials</b>	Number of CCMs at year end	5863	6390.67	
	Growth of CCM credential	1%	9%	
	Number of individuals pursuing the stackable credential	509	600	
	Number of CACMs	57	115	
<b>Conferences</b>	Total Attendees (Focus24 + CMAA2024)	1,584	1,650	
	Total registration revenue (Focus24 + CMAA2024)	\$ 1,110,000	1,190,000	
	Total sponsorships (revenue) (Focus24+CMAA2024)	\$ 425,000	435,000	
	Total exhibitors (revenue) (CMAA2024 only)	\$ 191,250	185,000	
	Total sponsorships (number) (Focus24+CMAA2024, unique)	37	38	
	Total exhibitors (number) (CMAA2024 only)	64	62	
<b>Committees</b>	Committees meeting their charges	See reports to Board	See reports to Board	
<b>Demographics</b>	Number of new PCM instructors who are women or from underrepresented groups	18	25	
	Number of new course instructors (other than PCM) who are women or from underrepresented groups	6	10	
<b>Finances</b>	Progress toward meeting budget, revenue	\$ 6,009,053	\$ 6,363,524	
	Progress toward meeting budget, expenses	\$ 5,809,771	\$ 6,351,219	
<b>Professional Development</b>	Total number of publications sold (12/31/24)	11616	12000	
	Total number of webinars offered (12/31/24)	24	26	
	Total number of courses offered (12/31/24)	34	36	
	Total number of attendees/enrollees in courses (12/31/24)	276	320	
	Total number of PDHs from CMAA courses/programs recorded (12/31/24)	20073	22000	

### **Title: Proposal for CMAA Member Resource Groups**

**Intended Outcome:** The CMAA Board of Directors will approve a process and a structure for creating and supporting member resource groups within CMAA.

### **Background and Definitions:**

The CMAA Committee on Diversity, Equity, and Inclusion (CODE) has three charges for FY23:

1. To propose and prioritize policy, strategies, and tactics to support CMAA's commitments to DEI as reflected in the Strategic Framework, the Statement of Values, and the Policy Framework
2. Promote, develop, and prepare CMAA members to build and sustain teams and work cultures that are open, diverse, welcoming, and inclusive.
3. Serve as a resource to Chapter DEIB/CODE groups and directors on matters related to integrating DEIB in chapter events.

In response to Charge #1, the committee studied the purposes and benefits of employee resource groups (ERGs) within organizations (e.g., Jacobs or Dewberry) and considered whether to establish a system and structure for the creation of similar groups for CMAA members (e.g., Women of CMAA or CMAA People of Color).

The committee believes Member Resource Groups (MRGs) would offer benefits to members and to the organization overall. Further, the committee believes a system of MRGs would support CMAA in achieving Outcome 2A:

“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 life cycle.”

ERGs are networks of employees that form based on shared characteristics or backgrounds and are sponsored by the organization they work for. Usually, ERG members:

“...share common needs in the workplace. The groups advocate for themselves and, in addition to fostering their professional development, often become a valuable resource to their employers, providing information about their identities, performing community outreach, opening new networks for recruiting, supporting business objectives, and serving as a visible sign of their employer’s commitment to a diverse and inclusive workplace.”

ERGs are often built on three pillars: career, culture, and community. Their objectives often include:

- Providing ERG members with access to networks they do not traditionally have access to;
- Identifying and addressing “pain points” in career development; and
- Serving as a safe space for members with characteristics in common and their allies to meet, engage on topics of common interest related to one of the three pillars, and to share feedback through the organizational management or governance structure.

### **Proposal for CMAA Member Resource Groups (MRGs):**

MRGs are defined as networks of CMAA members that form based on shared characteristics or backgrounds and are sponsored by CMAA. MRG members will share common needs in the association

and workplace. Membership in any MRG is open to any member to foster allyship; each MRG will have an advisor who is also a voting director of the CMAA Board of Directors.

Groups will, initially, focus on professional development, mentoring, and providing feedback to the CMAA volunteer leadership.

As groups develop and mature, they have the potential to become a valuable resource to CMAA providing information about their identities, opening new networks for recruiting, supporting CMAA's strategic direction, and serving as a visible sign of CMAA's commitment to a diverse and inclusive organization. Groups will advocate for themselves through a governance structure supported by the DEIB Committee (formerly CODE) and the CMAA Board of Directors.

### Membership:

- Membership in any MRG must be open to any CMAA member. Members who may not share the characteristics around which the MRG formed are welcome as allies.
- There are no additional dues or fees to join an MRG.
- Members will indicate interest in joining an MRG in their CMAA member record.

### Process for Creation:

- At least three CMAA members (individuals) must submit a Request to Form a Member Resource Group. This group will serve as the initial leaders and organizers. The request includes a description of the shared characteristic(s) around which the group has organized (e.g., Women of CMAA).
- The request should include a list of at least 15 additional, individual CMAA members, from at least five distinct, member organizations, who share the characteristic(s) and are interested in participating in the MRG.
- Requests are submitted to the Executive Office. Staff will review the request for completeness and work with the initial organizers to provide any missing information.
- Once a request is complete, it will be reviewed by the CMAA Executive Committee, who will approve its formation, and identify an advisor. The advisor will be a voting member of the CMAA Board of Directors.
- At the next national conference (spring or fall), a time and location will be identified for an organizational meeting of the MRG. The meeting will be included in the published schedule for the conference. The purpose of the organizational meeting is to identify the group's leaders and initial objectives or activities.

### Ongoing Activity:

- Once an MRG has been established and identified its leaders, the group will be expected to develop a plan of action for sustained activity over the next 12-18 months.
- Activities should be designed to contribute to the group's overall growth and development.
- Activities should be directed toward one of the three pillars: career growth and development, community building, or cultural education and celebration.
- Financial resources are described below.

### Roles and Structure:

**Advisor:** The advisor acts as the executive sponsor of the group in rooms of opportunity, such as with the CMAA Board of Directors. The advisor is responsible for ensuring the MRG meets its stated objectives and continues to be active (see below).

#### *MRG Leaders:*

- Each approved MRG must identify three people who will serve as the organizers and liaisons between the MRG, the advisor, and the CMAA staff.
- One leader must be designated to serve as the group's representative on the MRG Council.
- All MRG leaders will be invited to attend the CMAA Leadership Summit.

#### *MRG Council:*

- A group of MRG leaders who serve as the collective voice of CMAA's MRGs.
- The Council will designate one council member to serve as a member of the CMAA DEIB Committee.

All MRGs will have the opportunity to hold face-to-face meetings at CMAA's national conferences (spring and fall).

**Financial Support:** Once an MRG has been formed and identified its first year's objectives and activities, \$1,000 will be set aside for that MRG for the upcoming fiscal year. In the event of special circumstances (e.g., a speaker opportunity or a group formed before July 1), an MRG may make a one-time, off-cycle request from the CMAA Executive Office for financial support. These requests are limited to \$1,000.

### Virtual Engagement:

- MRGs will be able to communicate and share messages within their communities using the communities feature in CM HQ. This is a mobile-only platform accessible through the CMAA app.
- MRGs will be able to schedule webinars on topics of interest to the group; MRG leaders will work with the CMAA Professional Development staff team to schedule and run the webinar. CMAA Communications staff will assist in promoting the webinar to the general membership and to the community.

**Definition of Success:** Like ERGs, MRGs may take time to form and become sustainable. Nevertheless, the following markers of success would be evaluated within two years of implementation:

- At least three MRGs have formed. Possible early-formation groups include women, new members, emerging professionals, and members of the military (current and former).
- Membership or participation in each MRG's activities has been sustained over a 12-month period.
- MRGs have identified and initiated programs or activities that include but are not limited to:
  - Hosting at least two virtual programs and two in-person meetings each year.
  - Creating or hosting credential or exam study groups.
  - Hosting speakers (virtually or in person) within the group.



- Identifying or recruiting future volunteer leaders for the association
- Leading conference education sessions on topics of interest and importance to the group.
- Sharing member recruiting strategies with CMAA staff.
- Sharing MRG member needs and perspectives with the CMAA Board of Directors.

### Benefits:

#### To the CMAA Strategic Framework

- MRGs contribute to achieving the outcomes in the CMAA Strategic Framework by sharing their unique perspectives, leadership skills, experiences, insights, and best practices to:
  - Promote, develop, and educate professionals to build and sustain teams and work cultures that are diverse, welcoming, and inclusive.
  - Expand the Program and Construction Management narrative and tell the stories of the roles, opportunities, breadth, and values of the profession.
  - Offer professional development that is valuable to the recipient, relevant to the evolving industry, unique to the profession, and results in optimal project outcomes.
  - Pave the way for innovative and successful project execution.

#### To Members

- MRGs give members a unique opportunity to create a professional community that is responsive to personal identity.
- Members can become involved in something that can be managed or directed without taking on a long-term time commitment.
- Members have an opportunity to focus on initiatives that are important to them, personally, but may not be industry focused.
- Members may have opportunities for community service or engagement beyond traditional association activities.

#### To CMAA

- MRGs serve as a valuable resource to CMAA by providing information about their identities and sharing their unique needs with the association's leadership. In turn, CMAA can provide programs and services that respond to those needs.
- MRGs foster professional development and have the potential to become a valuable resource to CMAA by providing information about members' identities, opening new networks for recruiting, and supporting CMAA's strategic direction.
- MRGs serve as a visible sign of CMAA's commitment to sustaining an open, welcoming, diverse, and inclusive organization.



**Resources Required (FY24-FY26):**

NOTE: These estimates assume that one new MRG will form each year. Human resource requirements can be met with existing staff.

	<b>FY24</b>	<b>FY25</b>	<b>FY26</b>
Human Resources	.10 FTE	.10 FTE	.25 FTE
Financial Resources	\$2,000	\$4,000	\$6,000
Information Resources	CM HQ Webinar support	CM HQ Webinar support	CM HQ Webinar support
Other	1 meeting room at F24 1 meeting room at CMAA2024	2 meeting rooms at F25 2 meeting rooms at F26	3 meeting rooms at F26 3 meeting rooms at CMAA2026

**Next Steps:**

The proposal has been incorporated into the FY24 Business Plan. In anticipation of approval, the DEIB Committee (successor committee to CODE) and the staff will work together to announce the opportunity with a goal of “seeding” the creation of at least one MRG during the last quarter of 2023 and the first quarter of 2024 with the expectation that the first group could hold its organizational meeting at Focus24.

**GLOSSARY OF CATEGORIES****REVENUES:**

**Membership** – dues; renewing and new members in the new membership structure

**Meetings** – Spring and Fall conferences including registration, sponsorship, and expo for the Fall

**Professional Development**

In-Person Programs – virtual, online, and onsite courses

Online Programs – on-demand sessions, practice exams and online modules

Credentialing – CCM, CACM, stackable credential programs and CMIT

ELP – program to break even

**Publications** – books and research for sale

**Communications** – Strategic Partner Program, digital sponsorships and Program Achievement Awards (PAA) submissions

**EXPENSES:**

**Membership** – wages and benefits, credit card fees

Chapters - leadership meetings, travel to fulfill commitment to visit each chapter every year, and dues revenue share

**Meetings** - Spring and Fall conferences including:

food and beverage, exhibit hall set-up, speaker fees, travel, insurance, supplies, credit card fees, audiovisual and marketing

**Professional Development**

PCM Programs - virtual, online and onsite PCM and onsite Train the Trainer

Online Programs – learning management system fees and editing software

Credentialing - wages and benefits, CCM, CACM and CMIT proctoring, and program fulfillment

Other – wages and benefits of professional development team, ABET and ACCE fees

**Publications** – order fulfillment

**Communications** – includes subscription fees for mobile app, MCX (newsletter/marketing) and website, as well as support/membership in other organizations including: ACE mentor, Careers Building Communities, Construction Industry Alliance for Suicide Prevention and other brand awareness/marketing opportunities

**Governance** – includes Committees/Fellows/Advocacy - annual software subscriptions

Executive/Other – wages and benefits, travel, dues and subscriptions

Board – meeting expenses and COFPAES

**General & Administrative**

Professional Services – subscription and maintenance fees for database and analytics platforms, maintenance of all integrations and outsourced accounting, audit, HR, IT, legal and preparation and submission of tax form services

Office Expense/Overhead – rented office spaces, depreciation, phone, business insurance and taxes on unrelated business income (UBIT)

Other – wages and benefits and other employee benefits

## Construction Management Association of America

### 2024 Budget Summary\*

		<u>2024 Proposed Budget</u>	<u>12/31/23 Projections (as of 10/31/23)</u>	<u>2023 Board Approved Budget</u>	<u>2022 Actual</u>
<b>Revenue</b>					
Membership		\$ 2,389,824	\$ 2,150,882	\$ 2,150,882	\$ 1,942,173
Meetings		1,689,500	1,690,355	1,663,000	970,882
	Focus24	315,000	296,355	385,000	243,655
	CMAA2024	1,374,500	1,394,000	1,278,000	727,227
	Registrations	896,500	920,000	865,000	462,297
	Sponsorship	280,000	280,000	230,000	156,500
	Expo	198,000	194,000	183,000	108,430
Professional Development		1,929,200	1,792,816	1,813,795	1,496,879
	In-Person Programs	530,000	585,000	536,966	479,371
	Online Programs	173,000	190,111	248,124	114,025
	Credentialing	1,133,700	1,017,705	1,028,705	852,705
Publications		202,000	200,000	120,032	113,175
Communications		153,000	110,000	157,000	107,235
CareerHQ			65,000	55,000	
<b>Total Revenue</b>		<b>\$ 6,363,524</b>	<b>\$ 6,009,053</b>	<b>\$ 5,959,709</b>	<b>\$ 4,632,543</b>
<b>Expense</b>					
Membership		\$ 1,169,376	\$ 810,000	\$ 895,736	\$ 869,371
	Membership/Other	1,062,949	735,000	805,036	819,092
	Chapters	106,427	75,000	90,700	50,280
Meetings		1,359,540	1,567,282	1,479,356	811,208
	Focus24	324,550	296,282	332,600	96,815
	CMAA2024	1,034,990	1,105,000	891,560	714,393
	Catering	506,000	607,306	490,000	310,159
	Conference Planning	293,990	280,799	226,560	235,533
	Audio Visual	235,000	216,895	175,000	168,701
	Other	-	166,000	255,196	170,311
Professional Development		1,456,945	1,372,723	1,412,723	1,061,917
	In-Person Training	93,600	60,789	83,730	31,824
	Online Programs	70,488	97,691	87,690	46,947
	Credentialing/Other	725,258	590,823	605,823	583,321
	Other	567,599	623,420	598,419	392,376
Publications		196,930	45,561	62,421	49,455
Communications		328,010	120,000	215,038	80,341
Governance		646,167	598,857	629,002	529,290
	Executive/Other	496,292	510,357	488,502	461,260
	Board	149,875	88,500	88,500	57,538
G&A		1,194,251	1,295,348	1,254,809	864,189
	Professional Services	477,700	491,481	491,232	339,566
	Office Expense/Overhead	238,850	300,000	239,710	238,151
	Other	477,700	503,867	523,867	286,473
<b>Total Expense</b>		<b>\$ 6,351,219</b>	<b>\$ 5,809,771</b>	<b>\$ 5,949,085</b>	<b>\$ 4,265,771</b>
<b>Total Change in Net Assets</b>		<b>\$ 12,305</b>	<b>\$ 199,282</b>	<b>\$ 10,624</b>	<b>\$ 366,772</b>

\* subcategories below 5% of the total are not visible