

## Introduction

An effective strategic plan for a membership organization is grounded in the core values of the profession it serves. It must also have a sense of continuity: demonstrating a contemporary expression of the association's historic mission.

Simultaneously, the association must remain relevant, attuned to the national dialogue, able to pivot toward new tools and technologies, and responsive to member needs.

The CMAA Board of Directors conducted a review of strategic goals and core activities in 2019. The Board concluded that the four primary goals identified in 2016 remained relevant to the organization and that within each goal, core activities should be revised to reflect the outcomes of the *Future Focus '19* report and the *ForesightWorks* Report<sup>1</sup>.

As it does each year, the FY21 Business Plan begins with the mission, vision, principles, and optimal outcomes for the association.

## Vision, Mission, Principles, and Outcomes

**CMAA's Vision** is that all owners will realize project and program success by using professionally qualified construction managers.

**Our Mission** is to promote the profession of construction management and the use of qualified construction managers on projects and programs.

### Core Principles

- Construction management is rooted in traditional project management practices and requires a unique body of skills and professional knowledge to be performed successfully.
- CMAA must take the lead in preparing the industry to anticipate and take advantage of new technologies emerging in the construction industry and/or entering the industry from other fields.
- CMAA must continue to stress the value and importance of professional program and construction management regardless of project delivery method.
- CMAA's membership and programs must be open and welcoming to the widest possible range of professional practitioners: general contractors, architects, engineers, employees of owner organizations, real estate developers, financial and management consultants, and others.
- CMAA is delivery-method neutral. CMAA seeks to impress upon owners that professional CMs should assist them in selecting the delivery method appropriate for a project given the scope and risk profile of the project and the owner's constraints and capabilities.

### Optimal Outcomes

- Owners recognize the advantages of entrusting their project delivery to professional CMs.

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<sup>1</sup> *ForesightWorks* is published by the American Society of Association Executives. It is a comprehensive review of significant social, environmental, political, technological, and organizational trends and their implications for associations. The CMAA Board of Directors used the report in its long-range planning exercises in 2019.

- Owners consistently achieve project and program objectives by using professional CMs providing professional services.
- Construction management is understood and valued as a professional service with owners using Qualifications-Based Selection as the preferred method of procurement.
- The construction industry recognizes the Certified Construction Manager®(CCM®) credential as the most important symbol and validation of professional and ethical CM practice.
- Owners and clients use CCMs on all construction projects.

## **FY20: ~~The Year of Implementation and Evaluation~~ The Year of Living Dangerously**

FY18 served as the Year of Discovery, and FY19 was the Year of Engagement and Growth. FY20 was originally defined as the Year of Implementation and Evaluation. Many of the activities planned for FY20 were grounded in work that began over a year earlier and was either coming to fruition or ready for evaluation and review. These included:

- Develop the mid-level credential, named the Certified Associate Construction Manager (CACM) by the CMCI
- Become the Lead Society with the ABET Engineering Technology Accreditation Commission
- Define relationship skills curriculum
- Launch the Emerging Leaders Program
- Complete and launch the stackable credential (i.e., CMIT L2-L4)
- Implement a replacement learning management system (LMS)

When the CMAA Board of Directors approved the FY20 business plan in December 2019, we all thought we knew what would come next. By late February, the world had turned upside down.

## **The Challenges of COVID-19**

In late February 2020, CMAA began monitoring the spread of the novel coronavirus and calculating its impact on Focus20, as well as on other CMAA activities and programs.

We communicated with the Board on March 3. Our message then was that we were proactively monitoring developments regarding the virus and how it might affect our event in San Antonio. That monitoring included communication and updates from officials in San Antonio, as well as notifications and updates from the Centers for Disease Control & Prevention (CDC) and the World Health Organization (WHO).

By March 9, events were progressing with increased speed. We activated CMAA's Crisis Management Plan, which set out the process for identifying and assessing risks and possible outcomes. Next, we analyzed the financial risk to the organization to better position us to make any policy changes that might be appropriate.

On March 12, we shifted to a 100% remote work environment and cancelled the PCM course scheduled for March 25-27 in McLean, VA.

Finally, on March 18, with the health and safety of our staff, members, and conference attendees in the forefront of our minds and in light of the latest advice from the CDC, as well as the travel restrictions

placed on employees by several of our largest organizational members – both owners and service providers – we cancelled CMAA Focus20.

Focus20 was delivered in digital format as Focus2.0. Alternative opportunities for sponsors both for Focus2.0 and the CMAA 2020 National Conference were developed. All governance activities were conducted virtually.

In addition, working with PSI, the CMCI testing vendor, CMAA and CMCI launched live remote proctoring of the CCM exam beginning in early May. As a result, our testing capability resumed in only five weeks. We accelerated the initiative to produce an online PCM course: the course is now offered virtually (over five half-days) and online (self-paced for three weeks).

We committed to launching several new initiatives as soon as possible and to refine them as we went: launch fast, fail fast, learn fast, fix it fast. These included:

- Town Halls
- Virtual Tech Tours
- Member Forums
- CMAA2020

The first three items on this list will continue into FY21.

Finally, we began work on a CMAA-specific app, CM HQ. Now in the testing stage with an expected public launch early in 2021, the app is designed “to put CMAA in the palm of your hand.” It will feature news feeds, member-to-member engagement tools, event schedules, communities, and resources.

Today, ten months into the pandemic, we are planning not for the “new normal” but for the “next normal.” To that end, the FY21 business plan is built on a platform supported by the vision, mission, and principles of CMAA along with the four strategic goals initially identified in 2016 and validated in 2019. The plan identifies Core Activities, and specific initiatives. Taken collectively these are designed to drive the organization toward achieving its optimal outcomes.

The Strategic Goals and Core Activities for FY21 are:

**Goal 1: Improve the performance of the construction management profession**

- Revise the Standards of Practice by engaging a range of CM professionals
- Identify new forms of content delivery for Standards of Practice and other materials
- Deliver relationship skills education to members
- Educate/orient owners and clients on the value of CM in project delivery and program management

**Goal 2: Address workforce needs in the CM profession and in industry at large**

- Promote diversity, equity, and inclusion in the association and the profession
- Recruit individuals from other professions and practices
- Support the academic and contractor communities in their efforts to expand the workforce and the pipeline
- Partner with related professional societies on matters and initiatives of mutual interest

**Goal 3: Promote CM professionalism**

- Educate members on changes in the business environment and economy
- Educate owners on the core values of CM and CMAA
- Communicate the value of certification
- Persuade owners to prefer CCM and utilize the stackable CMIT program
- Educate members on the new CMAA Code of Professional Conduct

**Goal 4: Steward CMAA resources effectively to ensure excellence in organizational performance**

- Ensure excellence in customer service and member experiences
- Support CMAA Chapters' efforts to define, track, realize, and report success
- Ensure quality governance and volunteer management
- Steward resources effectively

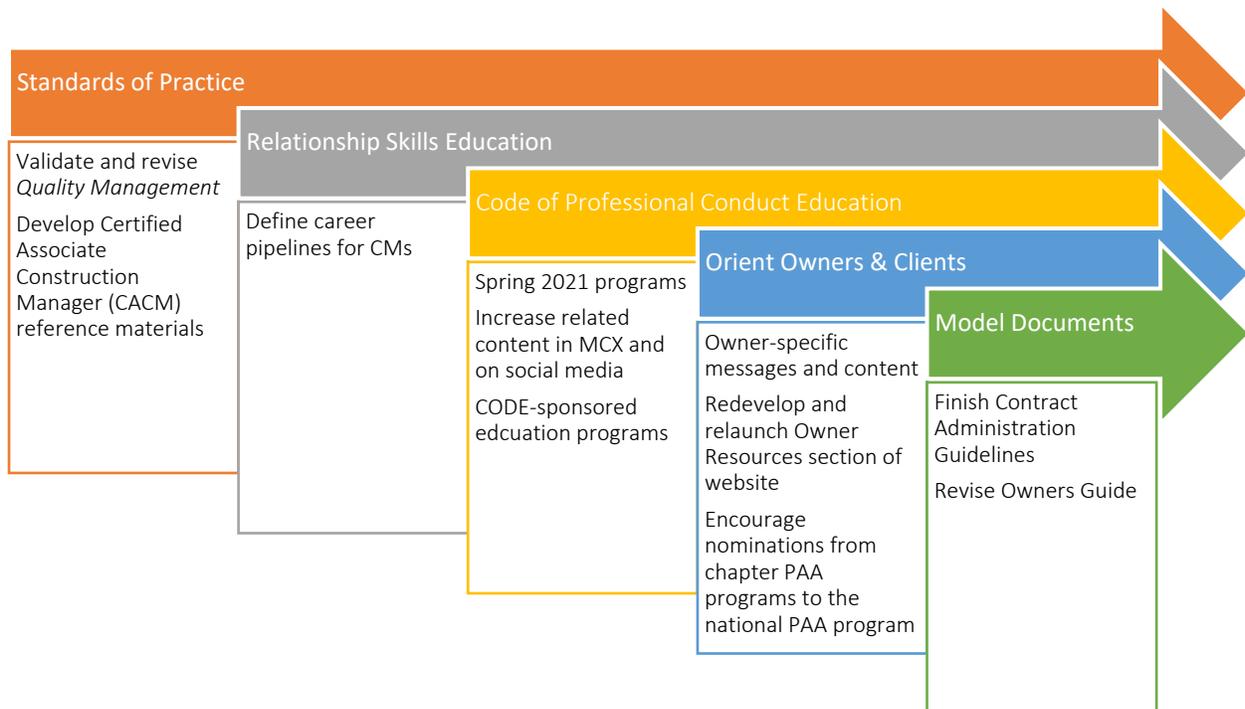
Planning for FY21 presented the CMAA staff team with an unprecedented opportunity to engage in creative and conceptual thinking about CMAA's programs, products, and services.

Step one was to take inventory of all programs, products, and services offered across the organization. Next, each item captured in Step 1 was assessed to determine its continued viability. As a result of that assessment, as well as cross-team conversations and planning, the consensus was that nothing would be discontinued in FY21, and also, with very limited exception, nothing would be added in FY21. Several initiatives of special importance, which are embedded in other projects, are described at the end of the plan.

The staff team is committed to applying their considerable talent and energy to delivering on the current inventory of programs, products, and services and using existing technology, human, and financial resources to continuously improve on our commitment to providing value to members.

As in years past, the FY21 plan presents specific tactics to support each Core Activity by Strategic Goal rather than by team. The tactics and activities listed below represent a summation of many specific tactics or activities to be undertaken over the next 12-18 months. In addition to the tactics identified in the diagram, there are several ongoing, "bread and butter" projects and programs that are aligned with each Strategic Goal. These activities represent CMAA's ongoing commitment to high-value activities that support member and organizational success.

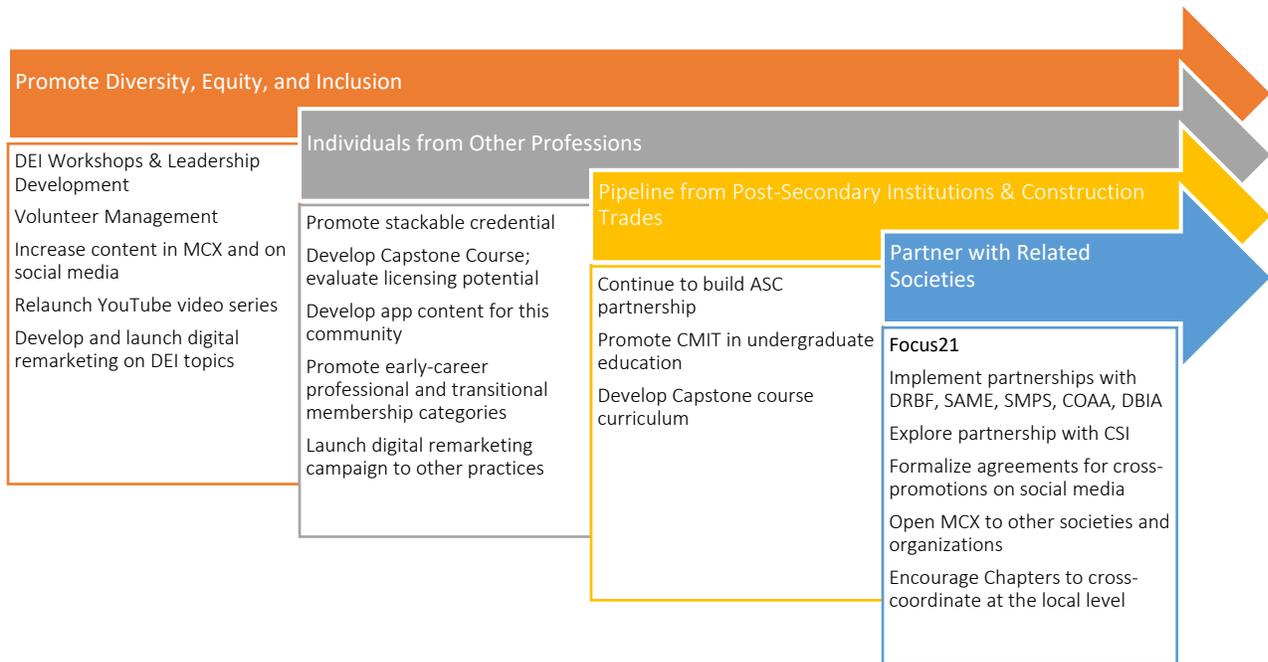
## 1. Improve Performance of the CM Profession



### Ongoing/Continuing Activities

- Promote CMIT, Stackable Credential, and CCM as critical professional credentials
- Produce at least 18 PCM courses annually
- Update, revise PCM course materials
- Continue to develop a trained corps of PCM instructors through “Train the Trainer”
- Continue the validation and revision of the *Standards of Practice* (begun in fall 2020)

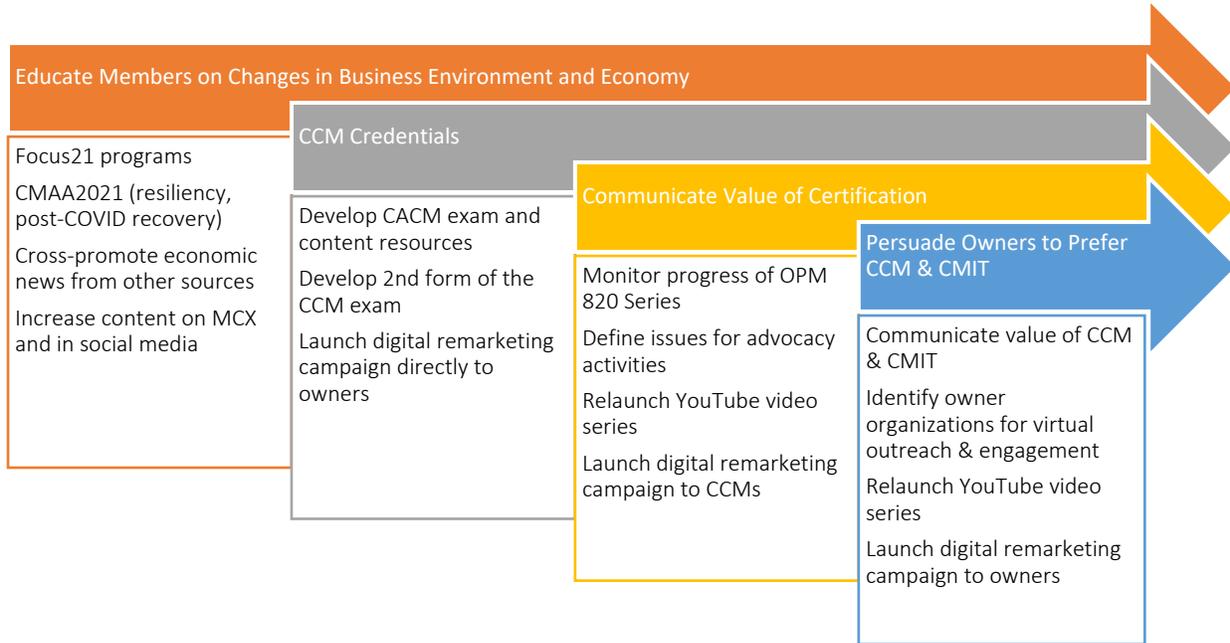
## 2. Address Workforce Needs



### Ongoing/Continuing Activities

- Develop CACM exam and content resources
- Continue to promote CMIT stackable credentials with academic institutions, the military, and related professional societies
- Continue PCM licensing program to expand reach of SOP training
- Draft program specific criteria for accreditation of programs by the Engineering Technology Accreditation Commission within ABET
- Identify at least two new organizations with which to partner on professional education, advocacy, and other issues of mutual interest

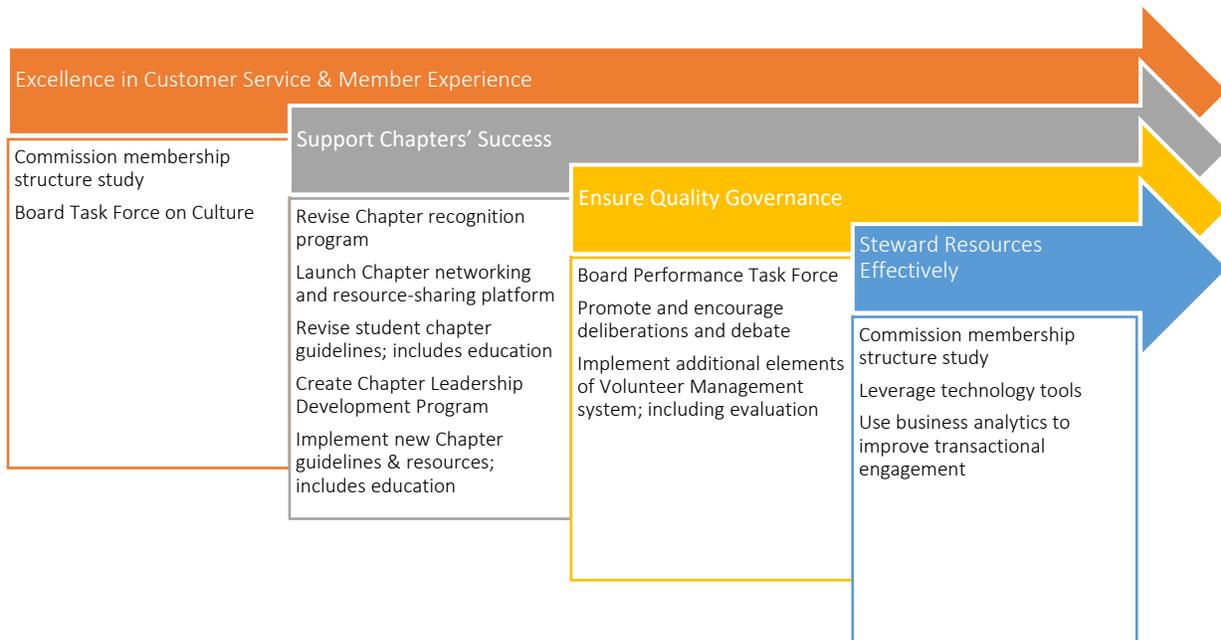
### 3. Promote CM Professionalism



#### Ongoing/Continuing Activities

- Continue infographics campaign using content from Project Achievement Awards
- Promote stackable credentials program within the military and academic communities
- Continue efforts to promote the CCM and CMIT with post-secondary institutions and the military
- Begin phasing in the recertification requirements for Ethics and Safety for CCMs

## 4. Excellence in Organizational Performance



### Ongoing/Continuing Activities

- Continuous improvement in customer service and member experience

### Focus21 and CMAA2021

As the staff team began planning for CMAA2020, it became clear that we would have to consider the future of Focus21, scheduled for March 28-30, 2021 in Chicago. The 2021 event was originally envisioned as a traditional, in-person event for 375+ registrants that focused on leadership skills and leadership development. It was our intent to invite our partner organizations like SMPS, CSI, DBIA, and others to contribute content and lead education sessions. This would continue the pattern started in Boston at Focus19.

All the indicators from the City of Chicago, the State of Illinois, the CDC, and other healthcare experts suggest that March is still too early to consider safely hosting an in-person event.

With the success of CMAA2020, as well as lessons learned, the CMAA staff team began with a brainstorming exercise and a series of planning meetings to fully reconsider what our spring offering

could be, assuming it was virtual. The result is a plan to host four distinct virtual events during the week of April 12-16, 2021. Each of the events is focused on one of the four stages and roles within the profession: student, early-career, professional CMs and CCMs, and senior executive leaders. All four feature education content and engagement activities that are tailored to the group’s expectations and preferences. **Still a work in progress**, the events are described below.

Focus21: First Job; First Steps	Focus21: Future Leaders	Focus21: Critical Path Professionals	Focus21: Senior Leaders Summit
<ul style="list-style-type: none"> <li>•Modeled on 2017 Rising CM conference agenda</li> <li>•Students &amp; Student Chapters</li> <li>•Content focused on Capstone and CMIT L2</li> <li>•Job Fair</li> <li>•Engagement organized around Board, program and project leaders</li> </ul>	<ul style="list-style-type: none"> <li>•Modeled on 2017 Rising CM conference agenda</li> <li>•Early-Career Professionals (includes ELP)</li> <li>•Content focused on PDHs in topics needed to achieve L2-L4</li> <li>•Engagement organized around Board members; organizational leaders</li> </ul>	<ul style="list-style-type: none"> <li>•Modeled on Focus19</li> <li>•Professional CMs and CCMs leading teams, projects, and programs</li> <li>•Content focused on PDHs in areas like business development, DEI, contracts, financing, IT</li> <li>•Forums organized around project types (e.g., transit or water)</li> <li>•Engagement organized around peers</li> </ul>	<ul style="list-style-type: none"> <li>•Modeled on McKinsey Global Infrastructure Summit</li> <li>•Senior leaders from organizations: strategic decision-makers and thought leaders</li> <li>•Content focused on strategy, long-term financing, market transformation, economic factors, owner needs</li> <li>•Engagement organized around peers</li> </ul>

Currently, CMAA plans to conduct an in-person event in Philadelphia, September 12-14, 2021 that also meets the requirements of the local health department. This is likely to result in fewer attendees and a smaller tradeshow. CMAA2021 will be supplemented by on-demand education sessions and other virtual programs.

## Special Initiatives (“Limited Exceptions”)

All the initiatives listed here meet the criteria for having high value to the future of the association coupled with modest expenses. The total, estimated, expense for all the items listed here is under \$35,000.

### Culture

During the October 2020 CMAA Board of Directors meeting, several observations and questions were raised regarding the culture of CMAA. No one suggested that CMAA’s culture was “bad,” only that in order to achieve normative change with respect to diversity, equity, and inclusion; board performance; chapter engagement; and membership, it was important to define CMAA’s existing culture and determine whether and how to transform it. To that end, the Executive Committee established a Culture Task Force. Chaired by Iraj Ghaemi, PE, CCM, the task force will be responsible for assessing and defining what CMAA’s culture is, what we want it to be, and then define a Strategic Goal and Core Activities for change.

The outcomes of their work will inform a comprehensive strategic planning process that will begin in the last quarter of FY21.

### Board Performance

The second outcome of the October 2020 Board of Directors meeting was the Board’s commitment to improving the policies and processes related to their performance as a group. In addition to the Culture Task Force, the Executive Committee also established a Board Performance Task Force. Chaired by Brian

McCarthy, PE, CCM, their charge is to develop policies, procedures, and forms to strengthen the board's assessment policy and process, including evaluation, draft a Board Member position description and Board Member Code of Conduct, strengthen and document the Conflict of Interest policy, and propose necessary revisions to the Rules of the Board.

### **Individual Contributions to CMAA's Success**

During the inventory and assessment phases of the staff's planning exercises, it became clear that our initial efforts to increase individual member engagement through volunteer opportunities and award submissions were not realizing the results we sought. To that end, the staff has reconsidered the messaging and approaches used to:

- Encourage individuals to nominate members for national awards
- Recruit volunteers for committees
- Invite members to write for MCX,
- Recruit instructors for PCM courses and webinars

The overarching conclusion was that while we had good answers to the question, "What's in it for CMAA?" we had not answered the question from the individual's perspective: "What's in it for me?"

As a result, the staff team is developing new messaging and materials to use in promoting the following opportunities:

- Volunteering with CMAA's national committees
- Nominating individual award recipients
- Nominating individuals to the College of Fellows
- Volunteering as a subject matter expert either as an instructor or author

### **Advocacy**

CMAA staff formed the Advocacy Task Force in October 2019 to identify government advocacy resources and strategies that support CMAA's Strategic Goals regarding the profession and the value of certification.

Recognizing that this effort would need to represent all CMAA constituents, the Task Force concluded that lobbying would not serve the unique needs of CMAA's public owner members.

Instead, the Advocacy Task Force recommended that CMAA adopt a "grassroots" approach<sup>2</sup>. Under this framework, CMAA would invest in the tools to keep members informed about issues of concern to the industry, such as legislation regarding procurement of CM services or certification, and provide tools, resources, and training for members to use in advocating on a particular topic or piece of legislation, if they choose.

The next steps are to convene the Government Advocacy Committee under their new charges:

1. Identify and prioritize issues for CMAA advocacy activities.
2. Monitor U.S. jurisdictions for proposed legislation or regulatory activity regarding licensing/registration of CM

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<sup>2</sup> Grassroots advocates are defined as individuals who are willing to take action online, on the phone, or by mail to contact their elected officials. Through education and training, grassroots advocates can over time grow into grassroots advocates: individuals who are leaders within their organizations and have established relationships with a legislator.

3. Monitor U.S. jurisdictions for legislation/regulation affecting CM services to state or local projects.

The committee will begin their work by identifying and prioritizing the issues to be addressed. The staff will draft an RFP for an advocacy resources service (e.g., GovPredict.com) and identify education needs for preparing members to undertake advocacy activity.

### **Membership Model Study**

CMAA's membership model has remained mostly unchanged for the past twenty years. In 2021 we will undertake a membership model research study to make sure we have an accurate understanding of our audience (members), their needs, and how we can best meet them. We will bring in outside expertise to make sure our membership model and structure best aligns with the changing dynamics and needs of the CM community. This initiative will be timed to ensure that results and any recommendations can be presented to the Board of Directors in Spring 2022 at the same time the Board will undertake its triennial review of dues.

### **Operations**

Key to CMAA's ability to deliver on its commitment to provide valuable services and experiences to members is leveraging the technology tools and platforms we have added to, developed, or integrated over the last three years. These include:

Fonteva/MemberNation: the system used for transactions and member management.

TopClass: the learning management system implemented in FY20 to combine online education, the certification database, and recertification systems into one system that is integrated with Fonteva.

Clowder: the container app for the new CMAA app, CM HQ, which will launch early in FY21.

Microsoft Teams and Microsoft OneDrive (Office365): the platforms for productivity used day-to-day by the CMAA staff team.

As part of their planning for FY21, the Operations Team identified improvements, process redesigns, or internal support services they will address in the next fiscal year. Many of these will expand and improve our use of the features in Fonteva/MemberNation to support member engagement, professional development, and certification activities.

Finally, CMAA will use business analytics to identify the transactional history of first-time attendees to CMAA2020. In this exercise we seek to trace the opportunities to connect with these individuals for additional programs, products, or services.

## **Conclusion**

In preparing the FY21 plan, the CEO and staff worked creatively and collaboratively to identify those mission-critical activities most likely to drive the organization toward achieving its goals and optimal outcomes with a specific focus on investing in core programs, products, and services. Our overall goal is to continue to be a resource for members as the CM profession and construction industry move into the "next normal."

Targets and metrics are mapped to the FY21 dashboard (attached). The dashboard also shows how activities and tactics have been modified over the last three years. The dashboard will be shared with the Executive Committee and staff monthly, and with the Board at each meeting.



The focus throughout is on member experience and increasing member value, while simultaneously affirming CMAA as a relevant and credible partner for members, and a valuable resource to the profession and the industry.