The following worksheet provides a structure you can use when engaging in strategic planning with your chapter. The process engages members in answering the following key questions.

* What is our vision of the successful future of our chapter?
* In that future, how do we articulate our purpose and how we achieve that purpose?
* Who do we need to serve in the coming months to best fulfill that purpose?
* What are the priority programs to meet the needs of our stakeholders?

Each section should be discussed among your volunteers/leaders to incorporate many perspectives in the development of the plan.

# Group Vision of the Future

What does our chapter look like 3-5 years from now if we are successful?

**CCIM Vision**

To shape the commercial real estate industry by being the most influential, innovative, and internationally recognized organization.

**CCIM Mission**

The mission of CCIM Institute is to elevate our members to the highest levels of success in the commercial real estate profession.

Keeping in mind the CCIM Institute mission and vision, what might the mission/vision be if it was specific to your chapter context?

# Chapter Vision

# Chapter Mission

# Key Audiences

As you consider the next 12 months, which audiences are most important to serve and what more do you need to know about those audiences to best serve them?

|  |  |
| --- | --- |
| Audience | Discovery and Next Steps |
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# Priorities

Using the vision above, and audiences you’ve listed, what are your 3-5 priorities in the coming years? Where we are best suited to provide the right solutions, and what will success look like in each of those areas?

# Goal Matrix

Use the priorities above as the basis for drafting your goals. Then use the tables below to identify the specific activities and metrics for each goal.

|  |  |
| --- | --- |
| Goal(s) |  |
|  | Year 1 | Year 2 | Year 3 |
| Activities |  |  |  |
| Metrics (quantitative or qualitative) |  |  |  |

|  |  |
| --- | --- |
| Goal(s) |  |
|  | Year 1 | Year 2 | Year 3 |
| Activities |  |  |  |
| Metrics (quantitative or qualitative) |  |  |  |

|  |  |
| --- | --- |
| Goal(s) |  |
|  | Year 1 | Year 2 | Year 3 |
| Activities |  |  |  |
| Metrics (quantitative or qualitative) |  |  |  |