Strategic Scorecard and Operating Plan

1. MEMBERSHIP PERSPECTIVE *Build commitment and loyalty through engaging and involving our members; make new members feel like old members!*				
Strategic Objective	**2017 – 2020 Targets & Metrics** *What's the goal and how will we measure this?*	**Team Lead**	**Strategic Initiatives** *What are the major actions?*	**Updates:**
Grow Members	**1. YOY Growth. Add 10 CMs over 2016 numbers** **2. Increase Max Dues Payers by 2-3 (or more)** **3. Win back 19 lost members by 2018** **4. Tap into Women in the Industry**	Dave & Team 3	• All teams work together to provide customer-centric services statewide. • Each region will bring in 1 max due payer. • Each region will bring back 6-7 lost members by 2018. Connect with WCOE, NAWIC, WIOPS as possible membership opportunities.	• Team 3 - Membership & business development is currently tracking positively for YOY growth and is ahead by 20 contractor members for 2017 as compared to 15 for 2016. • Team 3 - Membership & Business Development has added 4 max due payers thus far. • Currently an ongoing effort to win back the 19 lost members. • Team 3 - Membership & Business Development is working on tapping Women in the Industry by sending Darla to the CalSAE – ELEVATE Conference and Claire attended The Women in Construction – West Coast Conference .
Retain Members	**1. Retain 90% of CMs (with no max dues CM member losses) by EOY17** **2. Member survey results with 75% satisfied or very satisfied YOY**	Dave & Team 3	• Establish and conduct an effective member satisfaction survey by 4/30/17, distributed in May each year and have a survey station at Annual Conference. • Implement formal exit interviews with lost members. Attain 100% identification of explanation.	• Team 3 shows we are currently on track to retaining 90% of contractor members in the second quarter. • Ongoing efforts

Engage the 85%
 	
Create thriving Districts across the State
	1. Increase engagement from 15% to 25% of member companies attending District Events
	2. District scorecards with engagement metrics discussed at monthly team meetings
		Dave & Team 3	• Increase number of contacts at all levels and across functions at each member company.
			• Facilitate member-to-member connections.
			  • EC assigned at the beginning of the year to specific regions with responsibility to attend / communicate at District meetings.
			• Create meaningful connections across all types and categories of members.
			• Establish/institutionalize best practices around the practices that are working.
			  ○ All teams working together to promote statewide events with home district representation at events. And at least 10% income above expenses.
			  ○ Fully implement consistent onboarding across the Districts, that incorporates calls from District leadership, member-to-member connections, ambassador / mentor program.
			  ○ Create / monitor a mini scorecard that shows set of metrics on engagement for each region by Installation 2017. Include member participation: overall by District by type, by gender, by activity.
				• Team 3 – Membership and Business Development has completed their Q1 events and are working on Q2 events. Currently tracking an increase
				
				CLC Attendance
				January ~ Networking Mixer = 8
				February ~ Lunch & Learn = 12
				March ~ Networking Mixer = 13
				
				2017 Attendance
				January ~ Networking Mixer = 35
				February ~ Networking Mixers = 39
				March ~ Lunch & Learn = 8
				
				South
				CLC Kickoff (Formerly CLC Orientation)
				2015: 58
				2016: 63
				2017: 68 – Sold Out/Oversold (smaller venue than 2016)
				
				SoCal Wine and Beer Social:
				2015: 210
				2016: 258
				2017: 281
				
				LA Golf:
				2015: 144 Golfers- Sold Out
				2016: 144 Golfers – Sold Out
				2017: 144 Golfers – Sold Out
				
				Central/North
				No closed out events yet
				
				• Team 3 - Membership and Business Development is working on utilizing the Quarterly Goal Worksheet to track engagement metrics to be discussed at the next team meeting.