



# BOMA FLORIDA STRATEGIC PLAN

for the period 2017 - 2019

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## EXECUTIVE SUMMARY

In early 2015, the BOMA Florida Executive Committee and Governors sought to develop this plan. We worked on and developed portions of the plan with local boards to capture a comprehensive input base. Editing of the plan to a concise, cohesive philosophy of governance continued through 2019, and this finalized plan will be implemented.



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## Governors' Authorizations

*Passed by affirmative vote of Governors and Officers at the BOMA Florida Annual Meeting held in September 2016 at the Casa Monica in St. Augustine, FL.*

### Organizational Description

The Building Owners and Managers Association of Florida (BOMA Florida) is a powerful commercial real estate association with seven local associations serving 1,000+ members in the state of Florida. BOMA Florida contributes to advocacy efforts, including regulatory, legislative, and judicial proceedings, in order to help commercial real estate owners save money, create jobs, and set standards within our buildings. Read more about our [Codes Successes](#) and [Contributions to the Economy](#) in Florida. BOMA Florida stays connected and influential at local, state, and national levels on advocacy, sustainability, best practices, and more. All seven BOMA local associations in Florida are affiliated with BOMA International, a federated association based in Washington, D.C. Learn more about BOMA International by visiting [www.boma.org](http://www.boma.org).

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### Mission Statement

To advance a vibrant commercial real estate industry in Florida through advocacy, influence, and knowledge.

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### Vision Statement

BOMA Florida's influence and reach will enhance commercial real estate's image and status as a business and career choice.

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### Values Statement

#### INTEGRITY, HONESTY & RESPECT

Always do what is fair, right, and ethical while establishing credibility and trust.

#### COMMUNICATION & TEAMWORK

Share information in an open manner to promote efficient and effective results.

#### LEADERSHIP, ATTITUDE & ACCOUNTABILITY

Lead with an enthusiastic and positive energy sensitive of the impact to others.

#### PROFESSIONAL DEVELOPMENT & ENTREPRENEURIAL



Encourage, promote, and recognize innovative and dynamic forward-thinking.

#### CONFIDENCE & SATISFACTION

Advocate and endorse a culture of tenacity to exceed appropriate expectations.

### III. Strategic Analysis Data

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#### Internal Analysis: Strengths of the Organization

**Advocacy** – BOMA Florida’s biggest strength is advocacy. Our long-term presence in codes, legislative, and regulatory matters, as well as our partnership with Lee Moffitt, has enabled us to be a respected voice of commercial real estate in Tallahassee, and in the nation.

**Our People** – Our volunteers on Boards, Committees, Co-Chairs, and our overall membership are industry experts with a wealth of experience. Many of them hold or have held positions with BOMA International, which gives us additional positive exposure to the decision makers at the International level. Our Lobbyist, former. Speaker Lee Moffitt is influential and well respected in Tallahassee.

**Additional Strengths** – BOMA Florida’s work is strongly augmented by vendor relationships, business networking, educational offerings on advocacy, and statewide presence.

#### Internal Analysis: Weaknesses of the Organization

**Communications** – Due to the complexity of our foremost focus, Advocacy, communications need to balance between sound bites and detailed explanations. Planning on appropriate levels of detail, frequency, and target audiences is necessary.

**Showing the ROI** – ‘Proving’ ROI for our efforts in Florida, how we save our members money, is an ongoing challenge.

**Calls for Leadership/Mentoring** – Calls for leadership and committee participation require descriptions and reasonable expectations to obtain and retain volunteer involvement. Preparing our next wave of leaders in a mentorship manner, so they will be ready for their next steps, needs to be addressed in a more organized and comprehensive manner.

#### Internal Analysis: Listing of Strategic Issues

**Encouraging More Participation** – At Annual meetings; Advocacy efforts (be it grass roots or in Tallahassee); Government Affairs (committee work)

**Staying Relevant** – Keeping website fresh and up-to-date; Staying aware of CRE issues for the State; Communicating our efforts to our members

**Promote best CRE Practices to Our Members** – Be a resource to the locals and members

#### IV. Goals and Strategies

##### Goal #1: Build on Our Strengths: Advocacy

##### Strategy #1.1: Focus Efforts To Achieve Maximum Advocacy Impact

Indicate Active Request; Agenda Item for Weekly GA Calls

Objectives for Strategy	Focus Area	Activities	Responsibility	GA Notes
Regulatory/ Code	Codes Development	Proactively engage in the codes development process and the local code adoption process; Participate in the development of international codes and standards	Codes Committee	
	Commissions	Retain seats on Florida Building and Florida Elevator Commissions	*Jeff Gross, Brian Swope, & Chris Prather	
Legislative Matters	Model Legislation	Embark in drafting model legislation	Committees/GA Committee	
	Florida Session	Create position papers, analyze bills, and coordinate calls to action with members	Committees/GA Committee	Continue to work with Lee Moffitt on ongoing issues that affect CRE.

Goal #1: Build on Our Strengths: Advocacy  
 Strategy #1.2: Publicize Efforts To Stay Relevant

Objectives for Strategy	Focus Area	Activities	Responsibility	GA Notes
	Statewide Call	Continue to host the statewide calls	GA Committee	DK to lead in 2019
	Presentations	Speakers' Bureau (ie offer J.Gross to present to locals)	Committees/Past Presidents	2019
	BOMA Florida & Annual Meetings	FL: Agenda setting Annual: Create excitement and participation in Annual Meeting/Advocacy Day; Add an education session on the day prior to the Annual Meeting; Select Top 5 Issues	Events Committee	Mary Lantz WBM, SRC, June, Annual
	Minutes	Keep minutes in order to create a clearinghouse of local association and international affiliate programs and best practices	All	Secretary role; Rotating role on monthly statewide calls; BP to create archive
External Communications	Press Release	Develop a press release schedule; assign drafting and issuing; Run LOTY program	GA Committee/ Events Committee	2019: Legislator of the Year (JR)
	Social Media	Establish and maintain Social Media feeds (FB; Twitter; LI; Websites)	Staff	2019
	Thank You's	Issue hand written thank you letters to members, elected officials, and other stakeholders	GA Committee	2Q19 after Advocacy Day
	Govie	Submit application for Govie award	GA Committee	3Q19 consideration
	Videos	Produce videos (ie Business Rent Tax, or re: code updates impacting CRE)	GA Committee	
Collaborative Communications	Federal	Support federal regulations or legislation with grass roots support	GA Comm/Members	2019: WBM recap
	Advocacy Day	Arrange for a co-hosted Advocacy Day with another CRE organization—NAIOP, ICSC, FL Realtors	GA Committee	2019: CF/CA/ML to host call with NAIOP leaders on Advocacy Day Plans for April 9 at 10AM
	International	Contribute to BOMA International's clearinghouse databases	GA Committee	

Goal #2: Build on Our Strengths: Our Influence

## Strategy #2.1: Expand Efforts to Succession Plan & Lead Efforts

Objectives for Strategy	Focus Area	Activities	Responsibility	GA Notes
Members	Survey	Conduct a member survey for feedback; Take feedback and action plan based on survey	GA Committee	2019: Implement recommendations from Annual Meeting survey
C-Suite	C-Suite	Support BOMA International's C-Suite Tours; Build relationships with C-Suite executives; Focus these relationships on Advocacy initiatives, with expert input, funding, and support; Develop a communications and advertising plan to publicize and promote BOMA with C-Suite executives; Interview C-Suite contacts who are supportive of advocacy/educational efforts to understand where they expect BOMA's role to be impactful; Create meaningful networking opportunities (ie: Create Florida dinner event at Conference with C-Suite invite)	President	2019
Committees	Recruitment	Issue Activation Avenues twice per year	GA Committee	2019: Throughout
	Committee Updates	Lead updates/discussion at BOMA FL meetings: Tax; Insurance; Codes; Transportation; Environmental; Energy/Sustainability; Events; Internships	GA Committee	See bill analysis process
GA Committee	Policy	Review GA Committee Make up Policy, and add succession planning module to the draft	GA Committee	
Executive Team	Budget	Create a balanced budget (taking into consideration dues, lobbyist increase, non-dues revenue, project-based	Treasurer	3Q19: KW

		staffing engagement, sponsorship, and events)		
	Strategic Planning	Create and maintain strategic planning program	Exec Committee	GA
Staff/Lobbyist	Scope of Work	Develop a scope of work for staff engagement (BAE & Lobbyist) that matches the strategic plan	GA Committee	2Q19: Annual review & renewal
	Lobbyist	Retain the services of Lee Moffitt as our Lobbyist, and conduct long term succession planning	GA Committee	1Q19: Renew services
International	Applications	Recruit BOMA Florida members to apply for International leadership roles	GA Committee	
Locals	Best Practices	Share best practices of committee and local events among chapters, with as-needed engagements. <sup>1</sup>	President makes ask of Governors	2019

<sup>1</sup> Such best practice sharing to include:

- **Monthly Calls.** Locals to showcase issues during the monthly statewide calls; Ensure local participation on every BOMA Florida Committee
- **Governors.** Host Governor or committee talks across locals to share best practices
- **Sister Orgs.** Identify conduit contacts to sister organizations (Elev, HVAC, FAS, Env't'l, Sustainability, and Exterior Cladding trades; Extend invitation for sister organizations to attend local luncheons (NAIOP; IREM; AIA); Strengthen relationships with codes development bodies (ASHRAE, ICC), and position BOMA as a resource to these groups
- **Local Governments.** Challenge locals to attend one local city council or municipality meeting per quarter; Build participation at BOMA events that connect members with lawmakers; invite lawmakers to speak/ attend local events
- **IDF/PAC.** Offer IDF educational collateral; Every local hosts a PAC event for BOMA International
- **Emerging Professionals.** Suggest locals host student breakfasts; Recruit new talent into CRE—ie University partnerships





## Summary of Roles Stated in Goal Areas

### BOMA Florida Members

- Grassroots Support<sup>1,1</sup>

### Encouraging/Asks of Locals

- Sister Orgs as Conduit<sup>2,1</sup>
- Attend City Council Meetings<sup>2,1</sup>
- Build Codes Relationships<sup>2,1</sup>
- Support IDF/PAC<sup>2,1</sup>
- Invite Lawmakers to Events<sup>2,1</sup>
- Talent Recruitment into CRE<sup>2,1</sup>
- FL Committee Participation<sup>2,1</sup>

### BOMA Florida Committees

- Draft Model Legislation<sup>1,1</sup>
- Speakers' Bureau<sup>1,2</sup>
- Commissions Service (FBC/Elev)<sup>1,1</sup>
- Networking Opport. (Events)<sup>1,2</sup>
- Analyze Session Bills<sup>1,1</sup>
- Create Position Papers<sup>1,1</sup>
- Share at BOMA FL Meetings<sup>1,2</sup>
- Coordinate Calls to Action<sup>1,1</sup>
- Draft Press Releases<sup>1,2</sup>
- Manage Internship Program<sup>1,1</sup>
- Newsletters<sup>1,2</sup>

### BOMA Florida Officers & GA Committee

- Communication
  - Create Video Content<sup>1,2</sup>
  - Website Enhancements<sup>1,2</sup>
  - Social Media Presence Oversight<sup>1,2</sup>
  - Press Releases Oversight<sup>1,2</sup>
  - Hand Written Notes<sup>1,2</sup>
  - Member Survey<sup>2,1</sup>
  - Newsletter Oversight<sup>1,2</sup>
- Events
  - Weekly Coordination Calls<sup>1,2</sup>
  - Host Monthly Calls<sup>1,2</sup>
  - Expanded Annual Meeting >1.5d<sup>1,2</sup>
  - Host FL Meetings at Conventions<sup>1,2</sup>
  - Annual Advocacy Day<sup>1,2</sup>
  - Legislator of the Year Award<sup>1,2</sup>
  - Attend C-Suite Visits<sup>2,1</sup>
- Logistics
  - Govie Application Submissions<sup>1,2</sup>
  - Policy Creation<sup>2,1</sup>
  - Budgeting<sup>2,1</sup>
  - Staff Oversight (Lobbyist/BAE)<sup>2,1</sup>
  - Encourage Member Advancement<sup>2,1</sup>
  - Lead Strategic Planning<sup>2,1</sup>
  - Fiduciary/Fin'l/Bylaws Oversight<sup>2,1</sup>
- Clearinghouse
  - Best Practice Sharing Among Govs.<sup>2,1</sup>

**BOMA Florida Milestone Calendar - 2019**

1Q19	January	February	March
	<ul style="list-style-type: none"> <li>Identify expiring commission seats for 2019</li> <li>Track Bills</li> <li>LOTY Process</li> <li>Statewide Call</li> <li>Lobbyist Review/Renewal</li> </ul>	<ul style="list-style-type: none"> <li>Finalize Position Papers</li> <li>Track Bills</li> <li>Advocacy Day/LOTY Award</li> <li>Press Release</li> <li>WBM</li> <li>Blog Entry</li> <li>Statewide Call</li> </ul>	<ul style="list-style-type: none"> <li>Track Bills</li> <li>Quarterly FL News Piece</li> <li>Statewide Call</li> <li>Publish Financial Report</li> <li>Issue Activation Avenues</li> </ul>
2Q19	April	May	June
	<ul style="list-style-type: none"> <li>SRC</li> </ul>	<ul style="list-style-type: none"> <li>Statewide Call</li> <li>BAE Review/Renewal</li> </ul>	<ul style="list-style-type: none"> <li>Quarterly FL News Piece</li> <li>June Conference</li> <li>Publish Financial Report</li> </ul>
3Q19	July	August	September
	<ul style="list-style-type: none"> <li>Statewide Call</li> </ul>	<ul style="list-style-type: none"> <li>BAE Conference</li> <li>Issue Activation Avenues</li> <li>Statewide Call</li> <li>Budget creation</li> </ul>	<ul style="list-style-type: none"> <li>Quarterly FL News Piece</li> <li>Annual Meeting</li> <li>Publish Financial Report</li> <li>Strategic Plan Review</li> </ul>
4Q17	October	November	December
	<ul style="list-style-type: none"> <li>Statewide Call</li> <li>Gov App</li> <li>Member/Meeting Survey</li> </ul>		<ul style="list-style-type: none"> <li>Consider Model Legislation</li> <li>Statewide Call</li> <li>Quarterly FL News Piece</li> <li>Publish Financial Report</li> </ul>