

Application: 8737

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Page: Entry Information
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Chapter CAI-IL
Chapter Size Extra Large (1201+)
Category Chapter Operations and Sustainability
Program Name Board Engagement
<p>Each question is worth 20 points and will be scored using the following rubric:</p> <p>(1-5) Poor Didn't effectively answer the question</p> <p>(6-1) Fair Answered the question</p> <p>(11-15) Good Answered the question with more detail</p> <p>(16-20) Excellent Went above and beyond with proven results and visible data</p>
<p>Describe the program and why it fits the category. (20pts)</p> <p>The Board Engagement Program focused on involving the Board of Directors in the important operations of the chapter. The two main initiatives included financial training and policy review.</p> <p>When the 2022 President was in her President-Elect year, she recognized the importance for the Board of Directors to have a stronger understanding of chapter finances. She spent her President-Elect year attending Finance Committee meetings to learn as much as she could. She asked the chapter's Finance & Administrative Manager to develop a Basic Finance presentation which was presented at the board orientation at her first meeting as President. (See File 1 2022 Board Presentation Outline Financial Basics)</p> <p>Besides the Basic Finance training, the Board Orientation was enhanced by adding sections for Governance, Fiduciary Duties, Governing Documents, Strategic Planning, and Board Engagement. (See File 2 Outline_BoardOrientation_2022). The board was also given a resource guide which contains all important chapter documents (see File 3 TableOfContents_Board Leadership_ResourceGuide_2022)</p> <p>Another component of the Board Engagement Program was the review of chapter policies. This project was a crucial activity as many of the chapter policies hadn't been reviewed in years. Each board member was assigned two or three policies and the board collectively agreed on suggested changes. By involving every board member in the process, the board was able to collaborate, agree, and publish a new policy packet.</p> <p>The Board Engagement Program fits into this award category because it strengthened the inner workings of the chapter. Helping board members understand chapter governance and financials assures financial transparency. More people have eyes on the financials now and are able to regularly ask questions instead of rubber-stamping decisions.</p> <p>Additionally, the policy review helped to involve board members in streamlining our policies and review schedule. The new policy manual is published to the chapter website for event attendees to agree to during registration.</p>
<p>How did this program meet the mission and vision of the chapter and CAI as a whole? (20pts)</p> <p>The mission of CAI-IL is to provide education, legislative advocacy, and professional service resources to achieve excellence in community associations.</p> <p>Financial training provided an insight into the chapter's budgeting process and financial reports. This finance transparency improved the inner workings of the chapter because it encourages board members to ask insightful questions and make informed decisions, instead of just agreeing with proposed agenda items. After participating in the Basic Financial Training session, the board asked for an advanced session which further enhanced their financial understanding. (See Files 4 & 5 Presentation_Board_Finance_Basics and Advanced_2022)</p> <p>The Board of Directors makes all governing and strategic decisions for the chapter and the Board Engagement Program gave them a thorough understanding of chapter policies and finances to effectively do so.</p> <p>Additionally, the financial training and policy review involved every board member in the process. This engagement helped them all understand and streamline the governing policies as an entire board, rather than just completing the update with one or two people.</p>

What was the impact on the chapter and its members after completing the program? (Growth of membership, financially, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20pts)

The Board Engagement Program improved chapter operations in several ways:

1. By attending both the Basic and Advanced Finance training, board members increased their understanding of chapter finances, which in turn helped them engage in finance discussions and make more informed decisions.
2. Chapter policies were updated and a review schedule was developed so assure the policies would not become stagnant going forward.
3. The Board of Directors has become fully engaged in chapter governing and strategic decisions. At times in the past, some board members stayed in the shadows without engaging in task forces or special projects. The Board Engagement Program involved every board member and created a collaborative group who participated actively throughout the year.

Please provide quantifiable data supporting the rationale for success. (20pts)

The chapter considers the Board Engagement Program a success for several reasons:

1. Based on the survey completed by the board members after finance training, 90% indicated they had a below-average understanding of chapter finances. After the session, 80% felt it was helpful in understanding chapter finances. Additionally, 100% indicated they would recommend the training to future board members. (See File 6 Survey_Board_FinanceTraining_2022)
2. By engaging the complete board in the policy review process, we were able to update old chapter policies, remove some outdated policies, and combine them all into one cohesive document. (See File 7 Policies_Chapter_2022). Additionally, the board created a review schedule to which will assure chapter policies remain accurate and relevant going forward. (See File 8 Policy Review Schedule).
3. Board engagement has been greater than it has in the past several years as evidenced by the fact that we have an abundance of board members interested in Executive Board positions for 2023. Due to this engagement and interest, we will need to vote for Executive Board positions for the first time in 5 years.

Based on the results, will the program be a regular part of the chapter's programs in the future and why? (20pts)

The chapter intends to continue the Board Engagement Program in the future. In 2023, we've already planned to continue the expanded Board Orientation and Financial Training. The next President-Elect also attended Finance Committee meetings. The policy review is complete, but there are other projects to be accomplished. The practice of segmenting projects to involve all board members was successful in engaging everyone and will continue.

The board meets in a hybrid format and even the online participants are actively engaged and regularly participate in conversations and board tasks. This can be directly attributed to the Board Engagement program because every board member has to play a part.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

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