

Application: 287

Lockett, Callen

Page: Entry Information

Submitted By

Lockett, Callen

Email Address

clockett@cai-cv.org

Chapter

CAI-CV

Chapter Size

Large (501-750)

Category

Public Affairs

Goals and Objectives: 30 Points

Describe the main goal(s) of this program. (15pts)

CAI-CV's Buck-A-Door Grassroots Initiative

The goal of CAI-CV's Buck-A-Door Program is to increase awareness and participation of community associations in the legislative process. The CAI-CV Board of Directors asked the Coachella Valley Chapter's Legislative Support Committee (LSC) to come up with ideas to gain involvement from the Chapter's 400+ homeowner leaders and their associations. Specifically, they asked that associations begin to participate in funding the California Legislative Action Committee (CLAC) with one dollar for each household in their community. Each year, CAI-CV pays approximately \$16,000 out of its general operating budget to fund CLAC. (Each of the eight California chapters pay a portion of CLAC's budget based on each chapter's membership.) The CAI-CV board felt that by educating associations about the legislative process and CLAC's efforts to advocate for their industry, that associations would be willing to contribute directly to CAI's efforts in Sacramento. The board felt that they could measure the success of this effort by looking at the increase in dollars contributed to CLAC by association members.

Define the strategies used to attain your goal(s). (15pts)

The LSC investigated and collected information about numerous programs that had been attempted by CLAC over the past 12 years. While parts of some programs looked promising, none of them had been successfully implemented in the Coachella Valley.

After gathering information about prior efforts, the Committee came to the conclusion that they needed to simplify the entire process and clearly define what associations can and should do to protect themselves from bad legislation, and involve themselves in the legislative process. The Committee realized that they needed to convince associations that advocating on behalf of their communities is part of their fiduciary duty to protect and enhance home values for their residents.

The Committee then drafted a marketing plan to engage community managers and homeowner leaders in this effort - and began testing messages.

They established a sub-committee to draft a new brochure that contained everything an association needed to do to participate with CLAC.

They put together a budget and communications plan and went to the CAI-CV board for approval. Once approved, the plan was implemented resulting in raising more than half of the Chapter's CLAC contribution from associations rather than using the Chapter's operating fund.

Development & Implementation: 45 Points

In the next 3 sections, describe how the program was organized and executed within the areas of budget and marketing.

Budget Development (5pts)

The LSC asked the CAI-CV board for a budget of \$500 to pay for printing costs of the brochure. Printed brochures would be placed at the tables of the Chapter's 10 major lunch programs, and would also be available to hand out at all events for homeowner leaders and managers. The cost of investigating CLAC programs, drafting the brochure and developing a marketing plan were done with volunteers. The CAI-CV office would enlist the Chapter's Communication's Committee to use social media and eblasts to inform associations and mangers of the new program.

What marketing techniques were used? (10pts)

The CAI-CV board asked the Chapter's Professional Managers Committee to hand out the new Buck-A-Door brochures at each of their meetings/events and from their table booth at all 10 of the Chapters lunch programs. Additionally, brochures were placed on the lunch tables and announcements were made part of the monthly script for each luncheon, encouraging CAI-CV association members to place the brochure into their associaton board books for their boards to consider and hopefully vote to support. Articles were written for Quorum Magazine and Eblasts were sent out perodically, Associations that contributed were announced at the luncheons, and participating in the Buck-A-Door campaign was made part of the criteria for the Chapter's annual awards progrm. The criteria for the Community Assocation of the Year Award now includes participate in the Buck-A-Door program.

Who was your target audience? (10pts)

The LSC identified two target audiences. Ultimatley, the board would need to vote to participate in the Buck-A-Door program. For this reason, Community boards were the primary target audience. However, in order to hold a vote, the LSC felt the community manager would need to be supportive, requireing that they too were familiar with the program and felt comfortable that the new brochure would answer any questions the board may have. If the manger was comfortable with the information, they would be comfortable placing Buck-A-Door on the board's agenda.

Describe in detail how your program was implemented. Include deadlines, responsibilities and the implementation process. (20pts)

In the fall of 2018, the CAI-CV board was looking for ways to gain greater participation in CAI programs with the Chapter's many new homeowner leaders. At the same time, the board was struggling with how to pay the \$16,000 to CLAC while meeting the demands of a growing chapter.

The Chapter board decided to ask the LSC Committee to find ways to raise new funds to support CLAC. The LSC began investigating programs at other chapters had used, and programs that had been used over the past 12 years by CLAC. CLAC's existing Buck-A-Door program looked promising but was difficult to explain to boards. Past efforts by managers to explain the program and its impact on the legislative process fell flat.

The LSC engaged the help of the Chapter's Professional Managers Committee to help test messages to find out exactly what was needed to convince managers to get involved. They also engaged the Chapter's Homeowner Leader Committee to test messages and see what they felt would work.

Overwhelmingly, the feedback was that they needed a one-piece brochure that had everything a board would need to make a decision. It needed to be simple, concise and compelling. And, it needed to be a hard-copy that could be placed in the association's board packet.

The LSC decided that the messaging needed to make the point that participating in the Buck-A-Door program would help them meet their fiduciary duties to protect home values.

They needed to explain the legislative process to homeowner leaders and managers in simple terms.

They felt they needed to give managers and boards simple step by step instructions.

The brochure also needed to provide compelling reasons for participating and the assurance that participating was okay legally. They also provided answers to typical questions a board might receive from residents.

The LSC felt that they needed to give concrete examples of how CLAC impacted legislation.

And, finally, they felt like they needed to provide a sample resolution a board could adopt to make the Buck-A-Door part of their ongoing budgets.

The participation form was simplified to minimize what boards needed to return to CLAC to participate.

All of these considerations were developed and placed into a new brochure.

The brochure went to the Chapter's legal team for review and then was sent to CLAC's PR Committee for approval. Once approved, it was presented to the CAI-CV board for approval and then the marketing process started.

The development time for this new program was approximately two months and utilized three CAI-CV committees and more than 20 volunteers.

In March of 2019, the brochures were printed and sent out electronically to all CAI-CV managers and homeowner leaders. The marketing plan described earlier was implemented. The program was a huge success.

Results and Evaluation 25 Points

Using specific examples, describe the methods used to determine the program's success as it relates to your goal(s) (15pts)

The CAI-CV board restated their desire to increase involvement of community board members in the legislative process, and felt that the best measure of success would be to look at any increases in the number of associations participating in the Buck-A-Door program. If Buck-A-Door participation increased, they would know that both managers and homeowner leaders were more engaged in the legislative process, more informed about how CLAC works to protect associations, and more willing to get involved with future grassroots initiatives.

Comparing 2018 numbers with year-end numbers for 2019, of both participants and dollars raised, the CAI-CV board saw an increase in participation of 89 percent, and an increase in dollars raised of 80 percent. More than half of the CLAC donation of \$16,000 was raised through the Buck-A-Door program in the last few months of 2019. Clearly, the board was pleased with this result and the momentum achieved by the LSC Committee.

The board was so pleased with this result, that they asked the LSC Committee to increase Buck-A-Door participation again in 2020 and asked them to raise another \$7,000 to bring the total raised through Buck-A-Door to \$15,000 in 2020.

The board also felt that homeowner leader awareness had increased as a result of the efforts undertaken by the LSC Committee. At the end of 2019, California had several onerous bills passed and grassroots response locally was increased substantially.

How can the program be improved to use for the future? (5pts)

The CAI-CV Board felt so strongly that the new brochure was the reason for their success, that they sent copies to the Presidents of each of the eight California chapters. They offered to modify the brochure should any of the other chapters want to use their format.

For 2020, the brochure has been updated with CLAC's 2019 accomplishments and the Committee is working on a plan to offer volunteers to go visit association boards who would like a representative to walk them through the Buck-A-Door process. The Committee has asked the Programs Committee to continue to keep Buck-A-Door in the script at each of their luncheons.

How did this bring overall value to the chapter? (5pts)

In California, the legislature has taken an interest in the common interest development industry. The lawmakers don't always fully understand our industry and recent legislation is proof that our involvement is not only necessary but is truly a fiduciary responsibility of our association members. In January, a new bill went into effect that is causing all California associations to go to the expense of rewriting their election bylaws. While this legislation was costly, it was much better due to CLAC's involvement at every step of the legislative process. This effort helped raise the Chapter's visibility as a leader and authority on community associations. We have seen firsthand more involvement of homeowner leaders in the Chapter's programs.

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

Would you like to upload additional documents?

Yes

fileUpload2[Download File](#)**fileUpload3**

No File Uploaded

fileUpload4

No File Uploaded

fileUpload5

No File Uploaded

fileUpload6

No File Uploaded

fileUpload7

No File Uploaded

fileUpload8

No File Uploaded

fileUpload9

No File Uploaded

fileUpload10

No File Uploaded

aliasdb6b5c4cc1b84652a77dd1be66c36bbe

No File Uploaded

alias65d27719fc574f528d67c0c24a646682

No File Uploaded

aliasca4760df95b94c02b03c6440b9353a71

No File Uploaded

aliase94cac1cbef346e4b79d26502974a07b

No File Uploaded

aliasd869de44ad524bb8bbdc6b43a51beae5

No File Uploaded

fileUpload1

No File Uploaded

alias2f454e441e764267a13df2b44353f623

No File Uploaded