

Application: 302

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**Page: Entry Information**

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**Chapter**

CAI-CV

**Chapter Size**

Large (501-750)

**Category**

Member Services

**Goals and Objectives: 30 Points**

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

Community Association Board Recruitment Project

The CAI-CV Homeowner Leader Committee surveyed the Chapter's Homeowner Leaders and discovered that one of their main complaints was the difficulty of recruiting new board members to serve in their communities. The purpose of the "Who Me?" brochure is to provide a tool to community associations that would assist them with recruiting new board members. The brochure would also help explain the board's fiduciary duties and the key ingredients needed by board members to govern a thriving community.

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

The Homeowner Leader Committee started by surveying the Chapter's Homeowner Leaders to discover ways CAI could help them govern their communities successfully.

Once they learned that recruiting new members was a major concern, they appointed an ad hoc subcommittee to investigate what educational materials were already available. They researched CAI national, the CAI Foundation, and asked for input from other CAI Chapters. After finding that there was no current brochure or booklet that could be used, they created an outline of the information that needed to be included.

The ad hoc committee used one of CAI-CV's Board Member Workshops (BMW) to ask board members what exactly they felt potential board members would need to know to make a decision of whether or not to serve. The answers to these questions and the outline of materials found on the web and from CAI were combined to form a first draft of the brochure.

The concept brochure was then tested with board members via an Eblast and their feedback was very positive. A few changes were made.

The copy was then sent to our HOA attorneys for proofing and editing.

The final copy was offered to Chapter members at CAI-CV events and has been a huge success.

## **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 Homeowner Leader Committee asked the Chapter board for an initial budget of \$600 to cover printing and layout costs. The research and writing were done by volunteers. The printing costs were estimated to cover 1,000 copies printed on the Chapter's Versant 180 press. Additional copies would be offered to member associations at a cost of \$.25 each. The layout was estimated to be two hours at \$75 per hour for the Chapter's designer. So far, the Chapter has made a profit on the brochure.

### **What marketing techniques were used? (10pts)**

The Homeowner Leader Committee launched the brochure electronically through an Eblast to the Chapter's Homeowner Leaders. A subsequent Eblast went to managers and management companies asking them to distribute to their board member contacts. Printed copies of the brochure were given to all members who attended the Chapter's Educational Lunch Programs (about 200) for two months and then, four brochures were placed at each table for the following months. Copies were distributed through Facebook and Instagram. Copies were given to the Desert Cities HOA Council for distribution to their 300 members. Two management companies have requested copies to be distributed to all their members. From a marketing perspective, the brochure was designed and written to counter the negative perception of serving on an HOA board.

### **Who was your target audience? (10pts)**

The Committee's target audience was Homeowner Leaders. However, the brochure is designed to be handed or sent electronically to residents who are not currently involved with their HOA. The brochure is written to be appealing to residents who know very little about HOA governance.

The Committee tested different messages with the Chapter's Homeowner Leaders until they were sure they were reaching the right audience.

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

The CAI-CV board directed the Homeowner Leader Committee to investigate what the Chapters' Homeowner Leaders needed from CAI to help them better govern their communities.

The Committee came up with this idea by surveying the Chapter's Homeowner Leaders. Each CAI-CV committee has a board liaison who can act on the board's behalf. The liaison approved the survey and then informed the board of directors.

Once the Committee learned that recruiting new members was a major concern, they appointed an ad hoc subcommittee to investigate what educational materials were already available.

They researched CAI national, the CAI Foundation, and asked for input from other CAI Chapters. They found some good information to include but there was no current brochure or booklet that could be used to satisfy this need. They then created an outline of the information that might be included in a new brochure.

The ad hoc committee used one of CAI-CV's Board Member Workshops (BMW) to survey board members about what exactly they felt potential board members would need to know in order for them to make a decision of whether or not to serve. The answers to these questions and the outline of materials found on the web and from CAI were combined to form a first draft of the brochure.

The concept brochure was then tested with board members via an Eblast, and their feedback was very positive. A few changes were suggested and made.

The copy was then sent to our HOA attorneys for proofing and editing.

The final copy was sent to the Chapter's designer for layout. The layout and photos were reviewed by the Committee and updated according to suggested improvements.

Once the final copy was approved by the Committee, paper copies were printed and electronic copies were distributed to all Homeowner Leader members, managers, and management companies. Copies were then offered to Chapter members at CAI-CV events.

A copy of the brochure was placed on the CAI-CV website as well.

## **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)**

When the Homeowner Leader Committee took this project on, they felt the best test of success was to see how many electronic copies were opened and how many orders were received for additional copies. They also surveyed Homeowner Leaders attending CAI-CV's board educational programs. Since the purpose of the brochure is very clear - recruitment - the Chapter board agreed that the test of its success would be determined on both feedback and requests for copies following the initial distribution.

The biggest surprise was that all of the major management companies ordered hundreds of copies for their Homeowner Leader training sessions. As I write this, we are printing 300 copies for Associa. Feedback collected at CAI-CV's board educational programs has been extremely positive. Orders for printed copies exceeds 1,000. More than 2,000 have already been distributed.

We had a 79 percent open rate when the brochure was sent out electronically. That also generated many requests for paper copies.

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

As the Chapter modifies it's key messages each year, the brochure will be revised to include these as needed. The Homeowner Leader Committee accomplished their goal of creating a brochure to help association boards recruit new board members. The CAI-CV board sent copies to the other 8 California CAI chapters and offered them the copy to produce on their own. The biggest improvement for 2020 will be expanding the distribution to board members who are not already members of CAI-CV.

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

The "Who Me?" brochure directly solves a major problem reported to CAI-CV from our Homeowner Leader members. The feedback so far indicates the brochure is a home run. Orders are coming in each week for additional copies. The brochure is designed to explain the HOA industry and attract the right kind of people to serve on boards. It uses subtle language to encourage good behavior by existing board members. It also pushes readers to value CAI designations and to rely on professional management and professional advisors (CAI business partners). This brochure has a positive influence and brings value to all of the Chapter's members while solving a major problem for our association members.

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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