

Application: 311

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Page: Entry Information

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Chapter

CAI-CV

Chapter Size

Large (501-750)

Category

Membership

Goals and Objectives: 30 Points

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

Homeowner Leader Education & Membership Initiative

Goal: Increase education, membership and outreach to community association boards in the Coachella Valley.

After a year-long strategic planning process, the CAI-CV board decided that one long term strategy for the Chapter would be to focus on educating community association board members. To elevate the industry and alleviate the most reported problems in the industry, CAI-CV felt that the best outcomes would come from helping community board members understand their fiduciary duties. To protect them from their biggest threat, litigation, CAI-CV also had to convince boards to use professional advisors, especially professional management, CAI designated insurance brokers (CIRMS), CAI designated reserve specialists (RS), HOA lawyers (CCAL & Specialists), and licensed contractors to advise them before making major decisions. As part of this education, CAI-CV felt it needed to help community boards focus more on protecting and enhancing home values and less on keeping assessments low.

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

The strategy to increase education to community boards was two-fold. First, CAI-CV had to increase community board membership. Second, CAI-CV had to offer more education.

To increase membership, the CAI-CV board asked the Membership Committee to work with the Homeowner Leader Committee to take responsibility.

The CAI-CV board asked the Education Committee to work with the Homeowner Leader Committee to develop classes that would be attractive to community board members and would reflect the Chapter's messaging to elevate the industry.

Several key efforts were undertaken to accomplish these strategies:

Existing members were surveyed to find what topics were most important. The Chapter's Homeowner Leader Committee felt it was important to find topics that would attract the attention of board members.

A college intern was hired to develop a list of community board members that are not already members of CAI-CV. Advertising education to these board members was to increase membership and raise the level of education among HOA board members.

The Chapter reached out to management companies and law firms that already offered board education to their clients and asked if they could come and present CAI education options and hand out materials.

The Chapter formed an affiliation with an existing 10-year old community board organization called Desert Cities HOA Council.

The Homeowner Leader Committee also felt it needed a way to stay in contact with these board members and they launched a Coachella Valley online forum (like a blog) and offered it to all community board members who are either CAI-CV members or Desert Cities HOA Council members.

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 board of CAI-CV placed all of the HOA educational courses in the Chapter's marketing plan so each class would have one \$500 sponsor. The sponsorship would pay for a light dinner or lunch. This made the classes pay for themselves so that they would not need to charge a fee to community board members. While the Chapter may start to charge in the future, they felt it would be better to offer free education while building the program.

A budget of \$2,500 was set aside for the intern to look up HOAs in the Coachella Valley and create a list of board presidents that were not already members of CAI-CV.

The board also put the Desert Cities HOA Council (DCHC) in the marketing plan, allowing CAI-CV business partners and managers to sponsor their meetings at \$500. The money raised paid for new AV equipment, meeting room fees, and refreshments.

Finally, a budget of \$1,000 was set aside for marketing materials to use to promote CAI-CV education at DCHC meetings and at the management company and law firm events.

What marketing techniques were used? (10pts)

Marketing for CAI education was done through various avenues. All classes were advertised by Eblasts to CAI members. Using Facebook and Instagram, classes were advertised outside our membership. Using the Intern list, postcards were mailed to HOA board members who were not members of CAI. Postcards and flyers were developed to distribute at Desert Cities HOA Council meetings. Meetings were also published in the Chapters' monthly magazine, Quorum. Flyers were developed and handed out at our lunch programs and at management company events, and at law firm educational events. Ads were also available on the Chapter's website and app.

As the year progressed, all the advertising materials were modified and redistributed as needed. The Chapter is leasing our own printing press making it easy to print professional postcards and flyers for events and to modify and reprint just the number needed for each advertising opportunity.

Membership applications were included in all advertisements for classes to nonmember groups.

All of the marketing done to boards was duplicated to managers and management companies, asking them to get their boards to attend.

Who was your target audience? (10pts)

The target audience for this effort included existing homeowner leader members and HOA board members who were part of DCHC and those HOA board members who were not plugged into either organization. The goal was to reach as many HOA board members in the Coachella Valley as possible.

Here are the distribution numbers:

Existing CAI-CV homeowner leader members: 450

Desert Cities HOA Council: 300

Forum/Blog: 100 (so far)

List developed by intern: 2,000

At each class, attendees were asked if that class was their first encounter with CAI. Most classes had between 40 and 50 attending. For nearly every class, about one-third of the attendees said this was their first time with CAI. Surveys showed that 98 percent would attend another class in the future.

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

In January of 2019, the board began a strategic planning process. At a professionally facilitated strategic planning session on January 18th, the Chapter decided that they needed to try to reach out to community board members with educational options far beyond what the Chapter had formerly offered. They felt it was critical to include messages about the board's fiduciary duties and the need to use professional advisors to protect their communities against litigation.

Following the January 18th strategic planning session, the CAI-CV board asked the Homeowner Leader Committee to take responsibility for this effort, and to work with the Education Committee and the Membership Committee to develop the appropriate classes and to increase outreach and eventually increase membership of homeowner leaders.

The Homeowner Leader Committee surveyed the Chapter's existing members for topics and, working with the Education Committee, developed 115 hours of education for community board members to be offered in the Chapter's classroom, starting in 2019 and reaching the 140-hour goal by the end of 2020.

In September of 2019, a complete course list was published for 2020 that included dates, times and venues for the 140 hours of classes. The Classes were further broken down into beginner, intermediate and advanced courses based on the Chapter's experience with community board members over the past three years.

In March, an agreement was made with the Desert Cities HOA Council (DCHC) to create an affiliation with CAI-CV and bring them into the Chapter under the authority of the Homeowner Leader Committee. It was decided to keep the DCHC board and run the program the same as they have for the past ten years. It was also decided that they would encourage their members to join CAI-CV but not make it mandatory to attend DCHC classes. The Homeowner Leader Committee, working with the DCHC board, negotiated a venue in Cathedral City and another venue in Palm Springs for DCHC meetings. DCHC volunteers were given a list of CAI-CV professional advisors to include as their guest speakers. It was agreed that CAI and CAI membership would be discussed at every DCHC meeting. DCHC averages 40 board members at every meeting and their mailing list is 300.

In April, the Homeowner Leader Committee launched an online forum to test the idea with existing committee members. The forum was tested and tweaked over two months and a demonstration was provided to the Chapter board in August. In July, CAI National said that they were developing a statewide blog for all the California chapters. For that reason, the local effort was put on hold. In December, after seeing that the CAI national blog would take longer than expected, the CAI-CV board gave the Homeowner Leader Committee permission to launch. So far, they have about 100 community board members involved. To join, individuals must be on an HOA board or a volunteer leader in their HOA and must also be a member of CAI or DCHC. The Committee has one volunteer who administers the forum – adding new members. They also have two volunteers monitoring conversations to make sure things don't get out of hand. CAI-CV classes and events are advertised on the forum.

Working with the Membership Committee, the Homeowner Leader Committee engaged the services of a college intern to help develop a list of nonmember Coachella Valley board members. In California, CIDs are required to file a Statement of Information with the Secretary of State every two years. This information is only available by pulling up the corporate information one HOA at a time. The information must then be rekeyed into a spreadsheet. Typically, there is only physical addresses and often information is missing and needs to be looked up. This is a time-consuming task but has paid off. About one-third of the HOA board members attending CAI-CV educational events are from this list and have never been to a CAI function before. The list only contains two people from each HOA, the president and secretary. We get close to 2,000 names and addresses and then cull out our existing members. This list is used to solicit for attending events and educational courses throughout the year. We did two mailings in 2019 and will do four mailings in 2020. We have shared this list with DCHC and hope it will boost their numbers. We recruit at every class to make sure that entire boards are plugged into CAI. We also encourage the board to put CAI membership in their annual budgets to future boards have access to education.

All of these efforts were approved by the CAI-CV board and launched in 2019 and all have been very successful.

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 board used the following to determine the success of each part of this effort to build membership and engage more homeowner leaders in education.

The board decided one measure of success was to measure overall membership growth and homeowner leader growth. Over the past 12 months, since these efforts have been applied, the chapter has grown 550 to just under 750. Eighty percent are homeowner leaders. The Membership Committee hit it out of the park. Advocating CAI membership at free classes offering boards best practices on topics they feel are important – is working. We are seeing boards telling other boards about CAI's free education. Once a HOA board member attends a CAI educational meeting, they are likely to join.

Another method of measuring success is the surveys filled out by attendees at each class. The surveys ask participants to rate the speaker and content. So far, 90 percent are 5 stars, the highest-ranking. The surveys also ask for ideas for future topics. Another measure of success is that many of the topics board members are suggesting are already in the lineup of classes.

The CAI-CV board also decided to measure success by class attendance. The CAI-CV classroom holds a maximum of 50 students. As the classes were introduced in 2019, attendance was hovering at 35-45. So far, in 2020, we have seen an increase to 50 at each class, even when the classes are only a few days apart. The CAI-CV board is already concerned that our classroom is too small for future growth. CAI-CV has monthly training for board members, two basic training for new board members and a half-dozen advanced training programs during the year. See list attached.

Attendance at DCHC meetings has also more than doubled since affiliating their program with CAI. DCHC has been meeting in Cathedral City for ten years. Their attendance ranged from 12 to 30 at their monthly meetings. In August 2019, CAI contracted with a second venue to offer HOA board members from Palm Springs an opportunity to meet and attend educational programs near their homes. Beginning in December 2019, both locations are averaging 40 members at each meeting. The increase in attendance is a good measure that we are reaching HOA board members with the quality education that they want.

As mentioned earlier, about one-third of the attendees at each meeting say it is their first CAI meeting. This tells us that our "intern" list is working. While some of these new attendees are from word-of-mouth, the majority claim they heard about CAI through the mailings.

Finally, we believe that the increase in corporate sponsorship is a direct result of these programs that have engaged community boards in building relationships with vendors and choosing vendors to become professional advisors to their communities.

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

The program is growing faster than expected so the CAI-CV board is watching carefully and anticipating that we will need to adjust to accommodate more people within the next six months. We will be looking at options ranging from finding a new venue with more room, or purchasing more chairs and eliminating tables in the classroom. Options to start charging a nominal fee are also being considered to cover the costs of expanding the programs.

The CAI-CV board is also thinking about adopting some of the successful efforts for this program and using them to recruit more manager members.

We will continue to survey after each class to maintain a clear picture of HOA board member satisfaction.

Later in the year, the Homeowner Leader Committee will start looking at using their forum to promote new classes and there will be a greater effort to align classes with the DCHC.

The CAI-CV board has also asked the Education Committee to investigate turning our classes into videos to give them a longer shelf-life.

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

These programs have significantly increased CAI-CV's membership and we are seeing exponential growth in community board members joining CAI, attending events and volunteering to serve on CAI committees.

The greatest value to the Chapter have been the hundreds of local HOA board members who have heard and become believers in the need for community board members to be educated and to begin to protect their associations against potential litigation by being professionally managed and using CAI professional advisors.

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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