CAI-CV Strategic Planning Initiative

In January of 2019, CAI-CV began a year-long strategic planning process to help direct Chapter activities for five years starting in 2020. CAI-CV is 39 years old. For most of those years, the Chapter was headquartered in the same location and had many of the same events and classes, and had roughly the same number of members. In 2014, the Chapter board felt CAI members needed more education. They decided to start looking for a classroom and transitioning itself into a primarily education-oriented nonprofit. Over the next few years, the Chapter moved from a small industrial office to a class A building with a classroom that fits up to 50 students. They also significantly increased revenue and members. Now, in the new building, with double the membership and double the revenue, along with many new classes and events, it was time for the Chapter to reevaluate and plan for the next five years.

The goal of the CAI-CV board was to develop a plan that would help navigate the next five years, continuing their focus on education for all three membership classes.
Define the strategies used to attain your goal(s). (15pts)

The Chapter board decided they needed to bring in a professional strategic planning facilitator. They proposed to hold a brain-storming planning session in January. Included in the planning session were the 16 committee chairs, 16 committee co-chairs, and the 11 member CAI-CV board of directors. Paul Grucza, PCAM from Seattle was recommended and eventually contracted with to facilitate the meeting.

The strategic planning meeting with Paul was commenced on January 18, 2019. Prior to the meeting, Paul emersed himself in CAI-CV's history and past successes and failures.

From the data Paul collected, he developed a detailed day-long process for beginning the new strategic plan.

In addition to collecting data from participants on the day of the planning meeting, the general membership was surveyed and asked to comment on their personal experience.

All of the data collected was given to Paul who distilled it into a draft report with suggestions for the next steps.

The CAI-CV board reviewed Paul's recommendations and formed an ad hoc Strategic Planning Committee that included four Chapter board members and the CED. The purpose of the ad hoc committee was to take Paul's findings and distill it into a final report for the board to vote on and adopt prior to 2020.

The ad hoc committee met monthly a couple of hours before each board meeting. They met all the way through December.

In December, the board was presented with the strategic plan outline and it was adopted by the board.

The board also decided to make the ad hoc committee the Standing Committee for Planning and made it a permanent committee of the board.

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 realized that they needed a professional facilitator to help direct the strategic planning process. This would legitimatize the process and help gain buy-in so that when it was time to implement, everyone would be on the same track. The board set aside a budget of $5,000 to cover the facilitator cost, travel, hotel, and food. This budget also included the cost of supplies for the planning session and food for the group. There were no other costs until the plan began being implemented in 2020.

In August of 2019, the ad hoc committee began planning a new budget based on recommendations. These included funding for a new fulltime staff person, increase in classes, increase in printed publications and an increase in salaries for existing staff. The total budget for the first-year required $150,000 in new revenue. The budget was proposed and approved by the full board. Work began to plan new revenue sources. Advertising and sponsorships were fine-tuned and adjusted up. The board approved a new corporate sponsor level called Titanium that was for members who contributed $10,000 or more. Each committee was asked to provide input on how to add value to sponsors and advertisers and many of these new ideas were implemented in the new marketing plan for 2020. As of this date, the Chapter has raised $160,000 in new revenue to support the strategic plan.

What marketing techniques were used? (10pts)
To gain buy-in for the new plan, the ad hoc committee kept the board updated monthly. The initial strategic planning process included all of the Chapter's leadership; a group of more than 40 members participated. The leadership team included all three membership classes and all of the major management companies, as well as a broad selection of business partners. The committee leaders were updated regularly by the board liaisons who participated in each committee meeting. More than 150 members were apprised of the strategic planning process and were solicited for input.

Additionally, the ad hoc committee provided quarterly updates for all members in the Chapter's monthly Quorum Magazine.

It was important for the board that by the time they wanted to begin implementing the plan, that many of the Chapter's most active members would already be aware and supportive.

It appears that marketing was a success. Many features of the plan have been implemented and so far, the Chapter's membership has been extremely supportive. Committee volunteerism is up and we have many new corporate sponsors and have raised a significant amount of new funds while cutting costs.

Who was your target audience? (10pts)
At the highest level, the common interest development (CID) industry in the Coachella Valley was the target. Elevating the industry is part of the new strategic planning initiatives.

The next level of the audience is the CAI-CV members. Part of the strategic plan calls for making sure each membership class is gaining value through the Chapter greater than their investment of time and money.

Since the plan is focused on the future of the Chapter, part of the audience is future CAI-CV board members and future members. For that reason, efforts were made to document the reasoning for each decision and to gain buy-in for our committee chairs and co-chairs because they are our future board members.

Describe in detail how your program was implemented. Include deadlines, responsibilities and the implementation process. (20pts)
In September of 2018, the board decided that they would begin a five-year strategic planning process in January of 2019. 2019 was the fifth year of the previous five-year plan. They asked the CED to find a date and investigate facilitators.

Paul Grucza, PCAM from Seattle had been an instructor for one of the CAI national M-200 classes held at the Chapter's classroom. Following the class, he was recommended as a facilitator by another chapter. The chapter reached out and was able to hire Paul to conduct the first part of the strategic planning process that was conducted at an all-day brainstorming session on January 18, 2019. The Chapter was fortunate to have Paul facilitate the meeting because he was already familiar with the Chapter and had the clout and disposition to keep the meeting on track.

Given that we were aiming at a five-year plan, the board decided to include all of the chairs and co-chairs of the Chapter's 16 Standing Committees. As part of the Chapter's succession planning process for board members, the Chapter's bylaws were updated to include a requirement that anyone interested in serving on the Chapter's board must serve first as a chair or co-chair. To be a chair or co-chair, you must serve on a committee at least a year. This provided about three-years of leadership participation. The board wanted to make sure that they had buy-in from future Chapter leaders who would implement the plan.

About three weeks following the strategic planning meeting, Paul provided the Chapter with a summary of the day's work. He collected all the notes each participant took, as well as many sheets of poster paper that had ideas to improve the Chapter's future.

A week later, the CAI-CV board met and approved a new ad hoc Strategic Planning Committee tasked with taking Paul's report and turning it into specific goals and objectives for the plan. The ad hoc committee met every month just prior to the scheduled board meetings. Updates were provided to the full board each month. Each board member is the liaison to at least one of the 16 Standing Committees and they were tasked with updating their committees each month. This way, there was broad buy-in as the plan was implemented.

We are at the beginning stages of implementation but here are some of the plan that has been implemented so far:

- The new mission statement and vision statement was voted on by the board in December to be implemented in January. The vision statement "Better HOA Living" was added as a tagline to the CAI logo on all documents and publications starting January 1st.
- Salaries were increased for current staff and a new hire was found, both commencing on January 1st.
- The Chapter began publishing the monthly Quorum Magazine both as a hard-copy paper magazine for all members and digitally to all members beginning January 1st. For the February issue, the Chapter began requiring members to sign up for a paper copy. This has caused a dramatic decrease in printing expenses.
- In December of 2019 and January of 2020, the Chapter implemented a new Advertising and Sponsorship Plan that increased prices and added new opportunities for business partner and management company participation. The result of the new marketing plan is an increase of $160,000 new money over last year. The goal was $150,000.
- The Chapter also scheduled more than 240 hours of education, including classes for all three membership classes, in their classroom. And, for the first time they included all of CAI's M-100, M-200, and one M-300 course during 2020. This was part of the initiative to gain more managers at a higher level in the local industry.
- A meeting has been scheduled next week with The Desert Sun newspaper to discuss a weekly column on HOA living. Meetings have been scheduled already with Realtors for CAI-CV to present a program designed to elevate struggles between our two industries. On January 24th, CAI-CV held a focus group with College of the Desert to determine the next steps in establishing an AA degree in Community Association Management.

A copy of the plan is attached so you can see that there are many more initiatives that will be implemented over the
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)

To monitor the strategic plan’s implementation, the board made the strategic planning ad hoc committee a permanent Standing Committee of the board. They are tasked with monitoring the plan and providing monthly updates to the full board of directors.

From a financial perspective, the plan has a detailed budget that was agreed to by the board. All of the money to implement the first-year initiatives has already been raised. The budget cuts were implemented already without any negative feedback (so far) and included cutting out two events that were not profitable and publishing Quorum Magazine digitally, reducing printing expenses. The Chapter was printing and mailing about 800 copies each month. In February, the number decreased to 100 and we believe the number will even out around 200 by year-end.

The plan calls for a huge increase in classes being offered in the CAI-CV classroom. To date, we have seen every class have at least 40 students and most of the board training is topping out at 50. In fact, we offered a three-hour board basic training class on Saturday, February 1st (our first Saturday offering) and had 50 board members attend, a third of whom had never been to a CAI class before. Three days later, on the evening of February 4th, we had a board member workshop on Rogue Board Members and the room was filled again.

In December, the Chapter announced its permanent affiliation with a former rogue board group called the Desert Cities HOA Council. They have a mailing list of about 300 board members, and many are not currently CAI members. They are being managed through the Chapter’s Homeowner Leader Committee and they are using CAI educational materials and inviting CAI business partners as presenters. The Council has meetings for board members twice a month in Palm Springs and Cathedral City. Together with CAI-CV’s monthly education in Palm Desert, we are offering education to about 150 board members each month.

In January, the Professional Managers Committee started the Chapter’s first CMCA review class that had 45 managers sign up. All of these managers will be testing for the CMCA exam in February or March.

The Chapter will host a PCAM Case Study this year in December and is launching a PCAM support group starting on February 18th to help interested managers fully understand the requirements and prepare for the Case Study. Already, we have 26 managers signed up.

All of these success stories show the board that the new Strategic Plan is working to elevate the industry.

Together, these efforts are elevating the industry in the Coachella Valley and CAI-CV is transitioning into a educational powerhouse.
How can the program be improved to use for the future? (5pts)

The CAI board is anticipating many opportunities to improve the plan as it is implemented. It was for this reason the board asked the ad hoc committee to become a Standing Committee to continuously monitor the Chapter's progress and propose changes as needed.

The strategic plan is designed to be implemented in 2020 with the hope that the new programs, initiatives, and fiscal changes will meet the Chapter's needs for the next four-plus years.

At the December board meeting, when the plan was adopted, it was agreed that the Chapter's strategic plan is a "living" document and should be updated regularly, providing that doing so helps the Chapter to maximize its growth and its impact on the local CID industry and works to foster better HOA living.

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

Strategic planning is a cumbersome process with many moving pieces being evaluated by many people. Our results are relatively new but it appears the process we went through, including as many members as we did, had had a unifying effect on the Chapter.

So far, we are seeing value at every level. Business partners have increased their sponsorships and advertising like nothing that has ever been seen before in the Chapter's nearly 40 years of existence. Every class we offer for managers, assistant managers, board members or business partners is full. Our membership continues to grow each month.

The Chapter hands out evaluations after every program or event. Feedback from these evaluations shows an amazing increase in satisfaction among members who feel they are getting value from our programs.

We are vastly expanding CAI-CV's presence in the general community. Already, we have published two HOA Living brochures in partnership with two cities. With Realtor meetings and the affiliation with Desert Cities HOA Council, we are reaching far more people than ever before - thousands more.

As we continue to grow our manager and board population, we bring more value to our business partners and their responses to our marketing plan this year shows they are in agreement with our direction.

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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