

Application: 8807

Blum, Leslie

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Page: Entry Information
Submitted By Blum, Leslie
Email Address leslie.blum@cai-nc.org
Chapter CAI-NC
Chapter Size Very Large (761-1200)
Category Leadership
Program Name Reimagining Volunteer Infrastructure
Each question is worth 20 points and will be scored using the following rubric: (1-5) Poor Didn't effectively answer the question (6-1) Fair Answered the question (11-15) Good Answered the question with more detail (16-20) Excellent Went above and beyond with proven results and visible data
Describe the program and why it fits the category. (20pts) <p>Volunteer energy is of course the heart of any membership organization. As an "extra-large" classification statewide chapter with the equivalent of 2.5 full-time staff and volunteers spread across a very broad geographic area, getting volunteering right is a must.</p> <p>In 2019, well before Covid, the Board of Directors began frank discussions about the state of volunteering in the chapter. At first it was a couple directors observing how much time the Board was spending on oversight of a couple groups here and there. Staff were beginning to express similar frustrations. Discussions broadened to question "the right people in the right seats on the right bus" as we began to see volunteer enthusiasm and effectiveness flag.</p> <p>Then Covid happened. Weaknesses in the volunteer structure became near-fatal flaws in their respective areas. After leading through several crisis mode months, the Board began to look ahead, and took advantage of the reflective pause of the break in normal chapter operations and patterns. By early 2021 came the conclusion that the volunteer structure was "broken."</p> <p>By early 2022 the chapter had worked with an outside "people resources" consultant engagement and undergone several months of deliberation.</p> <p>The result: January 2022 we sunset all volunteer groups (except the two mandated in the bylaws), and set about launching an entirely new volunteer infrastructure. A really big risk.</p> <p>The year 2022 saw the explanation of all the above to the membership, the establishment of a new slate of 15 total volunteer groups, and the recruitment of all groups' leadership and 120+ volunteer members.</p> <p>Leadership often requires candid analysis, risk-taking and long-term commitment. This program was a bold move by a Board and staff willing to do all three.</p>

How did this program meet the mission and vision of the chapter and CAI as a whole? (20pts)

The Board began its work with the consultant by articulating considerations acknowledging that Covid changed the world we operate in many ways. Education, the primary CAI mission, was always top of mind.

- Forced a pivot to virtual education when we had thought it was likely a long way off for us.
- Forced members to push their comfort zones, collapsing geographic barriers to volunteer participation.
- Brought new ability to reach members and organizations across the state; geography no longer a barrier to education.
- Managers find it easier to get board members to participate now.
- Staff and Board have shifted to discern/direct programming content, need to shift back to volunteer members.
- How do we use volunteers going forward? to match their interest and meet chapter needs?
- Chapter ready to think beyond events- chapter has grown up.
- Staff duties can be outsourced to volunteers in more narrow ways in a natural progression for growing organization.
- Need to find balance of meeting member needs, financial advantages, staffing considerations, volunteer roles.

Informed by the reflections on the new environment, the Board took a broader view than just seats-on-the-bus scope and focused on “what are the right buses in the first place?”

Starting from scratch we defined 10 needed roles best filled by volunteers, and designed an all-new volunteer infrastructure accordingly, designed to further 3 aims.

- Amplify awareness of the overall management profession, HOA self-governance model, and industry credentials and legislative environment
- Grow membership by growing the number and commitment level of management companies
- Direct “intentional” education content across chapter events and resources through centralized planning

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)

Members have responded very enthusiastically to the reinvention of volunteer opportunities. More specifically, they are now able to find their niche. Prior to the re-invention, there were much more limited volunteer pathways for members to get involved. Looking back, it has become clear that members signed up for slots that weren’t a great fit with their interests and gifts because of that. The number of volunteers had been declining, and the number of actively engaged members even more so. When new group “missions” were introduced, they actually filled faster than anticipated.

Members are finding their places!

Those who enjoy outreach roles have embraced the new groups involving roles as CAI ambassadors. Those who prefer more deliberative missions have turned out even more strongly for new think-tank groups such as an Attorney Roundtable, Business Partner Advisory Panel, and education-related teams.

And the level of engagement, productiveness and sheer fun in committee meetings has made a great difference in the enthusiasm of volunteers. They are now spreading the word, and rather than staff and Board scratching our heads about who we can get to do what, members are reaching out to say “XXX told me I need to get involved.”

- The new volunteer infrastructure has involved more than just wiping out all former groups and creating a new slate. Some examples:
- Our new approach to governance includes all group chairs now being appointed directly by the chapter president in conjunction with staff, instead of being chosen by group members. This careful nurturing of leadership is helping to build a sustainable volunteer infrastructure to drive the chapter’s future.
 - New flexibility built into the new volunteer group guidelines has also relaxed some former administrative requirements, helping to draw a more committed and diverse volunteer pool.
 - Cross-pollination of groups brings a greater sense of the entire organization’s mission and scope, as certain groups now have delegates to other groups and feed each other ideas.
 - We have refined the role of Board liaison, with a member of the Board assigned to all groups with a more vocal role.
 - Board reporting protocols have been updated.

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

We are quite proud to report:

*Volunteer Groups:
In 2020-21 the chapter had five discretionary volunteer groups (in addition to those mandated per Bylaws; by the end of 2022, that number had more than doubled to 13.

See attached comparative org charts.

*Group Leadership:
All groups have chairs and a Board of Directors liaison in place.

*Group members:
As of the end of 2022 there are more than 120 volunteering chapter members.

The number of organizations represented: 60. About half are management companies, the others are Business Partner firms with a few HOAs as well.

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

This program was always known to be more than a one-year exercise, in order to build leadership stability and overall sustainability. We will be continuing the rollout in 2023- for example there are plans to bring group chairs together in dedicated ways to help them support each other, perhaps vent in a safe space and truly see themselves as organization leaders.

The intent is to build a true infrastructure to support a growing chapter – we have just achieved “extra-large” chapter status!

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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