

Application: 10056

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Page: Entry Information

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Chapter

CAI-NC

Chapter Size

Extra Large (1201+)

Category

Out of the Box

Program Name

Community Association of Excellence Seal of Distinction

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)

CAI-NC developed this program in 2023 to identify, recognize and celebrate community associations who recognize, fund and follow best practices standards.

In contrast to bestowing a conventional award to a select few, we wanted to shine a light on all community associations who meet a careful set of objective criteria.

Especially these days, we as an industry need to loudly and publicly honor "boringly well-run" community associations that create great places to own and live. We want board members and managers to feel pride in their leadership of a CAI-NC Community Association of Excellence.

Just as importantly, the program addresses these strategic issues and opportunities:

- Helping current Homeowner members appreciate the importance and relevance of responsible operation of their community association by following of best practices.
- Raising awareness among future community association Owners about the value of responsible operation and governance.
- Supporting the work of current and prospective Board Members, who are increasingly reticent to serve. A chief reason is widespread lack of appreciation for the importance and impact of best practices.
- Reaching the greater community surrounding our Seal of Distinction communities, with positive messaging about taking pride in a community association.
- Introducing broader audiences with the concept of professionalism in community association management, in an effort to counter prevailing ignorance and negative pop culture messaging. Key examples: legislators, government officials and media.
- Promoting the CA management profession to talented prospects who may never have considered this career, at a time when management companies are desperate for managers.

The first "class" of 24 Seal of Distinction communities are currently being privately notified and will be formally announced with much fanfare at the chapter's largest annual event March 15.

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

CAI's mission is briefly stated as: "dedicated to building better communities."

Managers and Board members who review the criteria for this program, even if they choose not to apply, are empowered with greater knowledge of best practices and the value placed on them by the industry's premier organization. They have an easy checklist that serves as a roadmap to excellence...and are thus better equipped to understand in a tangible way what it takes to "build better communities."

The NC chapter's own mission is to develop "professionalism, effective leadership and responsible community engagement..."

The Seal of Distinction program meets all the above squarely.

• Develop Professionalism:

One of three pillars of the NC chapter's current strategic plan is to Advance Professionalism by enhancing awareness and positive perception of the industry and its professional career paths.

This continuing top priority is in direct response to the top pain point expressed in our management company surveys year after year: lack of management talent. Individuals who may be perfectly well-suited to this career are often unaware of its very existence. Further, negative images of HOAs prevent others from considering it.

The chapter's Advancing Professionalism Committee is spearheading the Seal of Distinction as a keystone program to directly reinforce and promote positivity about this professional career.

• Develop Effective Leadership

This program empowers Board members to see themselves as leaders by providing them with an objective set of standards to strive for. Boards can feel more confident in their ability to lead responsibly and to use this knowledge to demonstrate to their homeowner membership their own conscientiousness and commitment to excellence.

• Develop Responsible Community Engagement

At a time when pop culture messaging can be irresponsible by painting HOAs in unflattering light, this program seeks to elevate them. It is designed to showcase how the community association housing model can work successfully. When more of the general public becomes aware that living in a well-run planned community can actually be a great experience, everyone wins - HOA property values go up, quality of living there goes up, more volunteers are willing to serve... and managers' lives are easier!

What was the impact on the chapter and its members after completing the program? (Growth of membership, financial, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20 pts)

The Seal of Distinction program is proving its value even before the first winner is announced.

Behind the scenes our independent judging panel of anonymous retired PCAMs (chosen to eliminate conflicts of interest) has not only been identifying winners but also documenting gaps that caused some applicants to "fail the test."

Staff proactively reached out to these four communities, explaining the areas of concern. Their response has been one of not only appreciation but of intent to close the gaps and re-apply in the next cycle.

In addition, staff and chapter board members have already heard from community associations that didn't apply because they used the application checklist as their own report card and plan to use it as a tool to address their shortfalls.

When the winners are announced in a few weeks, the chapter will not only do our own celebrating of both the manager and the boards but also provide resources to help them actively promote this achievement:

- Each winning community will be given 2 free seats at Law Day, one for a board member and one for the manager. (\$250 value each)
- At Law Day, 10 of the winners will be randomly drawn onstage for a free registration to Annual Conference & Expo (\$200 value each)
- Announcement in member newsletter and chapter website
- Spotlight of each winning community on social media channels
- News releases
- Digital Media Kit for each community: Graphic art of the Seal of Distinction for their use, template for exterior banners/signage, etc.
- Special name badge ribbons to wear at future chapter events

These tools will in turn serve to promote the next cycle of Seal of Distinction applications and renewals at the 3-year mark, further endorsing and even evangelizing for community associations, the management profession and CAI.

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

The application was designed to be as easy as possible given the need to be rigorous in the information required. However, despite our heavy promotion and the no-cost application we had no idea how many submissions to expect this first year.

The Board and the Committee would have been happy with 10 submissions.

Instead, 28 submissions were received. Each had to be verified with the board president's name as well as the manager's name if applicable. That number alone meant that 28 different community associations across North Carolina proactively reviewed a robust set of best practices and conducted their own self-assessment. That very exercise reinforces the ongoing commitment to excellence among hundreds of volunteer leaders and managers- CAI's mission.

Further, the CED was contacted by at least 10 additional communities seeking clarification on the application criteria, who then said it was clear they had some work to do before their association was "in shape" to submit. We presume many more quietly reached the same conclusion.

Of the 28 submissions, 24 were accepted as attaining the Community Association of Excellence Seal of Distinction. The four who fell short received personalized explanations of the gaps that need to be closed and were encouraged to then reapply during the next submissions cycle.

The winners will be announced March 15, 2024 at CAI-NC's largest event of the year, with 500 participants. Managers and board members from nearly 100 organizations are typically represented at this traditional "Law Day," and will be exposed to the importance of best practices and responsible leadership.

How can you improve this program going forward? (20 pts)

The Board sees this as a signature program for the future.

The Committee and staff have already identified opportunities for greater clarity on the application form. Examples: specifying "adopted" v. "approved" budget; specifying that all relevant documents must include signatures; noting that copies of insurance policies will not be accepted in lieu of COIs.

We also learned the hard way that we need to make crystal clear that all documents and responses must be provided at one time. Because of the newness of the program, as a courtesy we reached out to all applicants who left off even one document or submitted unclear info (ex. "Budget comparison" v. "Income Statement.") This was extremely time-consuming and cost committee members, judges and staff dozens of unanticipated hours.

We've also recognized that we need to identify which benchmarks are "pass/fail" (ex. D&O insurance) v. a softer measure of acceptance - for example, is funding 90% of recommended reserves sufficient or will we continue to require 100%?

The judging process itself proved more cumbersome than it could b, and we have scheduled a debriefing meeting with the judging panel to discuss how to provide greater clarity for them. We do plan to retain the promised confidentiality of the submissions' content and the anonymity of the judges' panel.

We will follow recommendations from the program evaluation sent to the individuals who completed all 24 applications, reviewing their comments on the overall process.

The chapter plans to keep improving this program with subsequent cycles. We certainly plan for it to be an annual program and perhaps semi-annually as it gains traction.

It's our hope that the number of community associations earning this distinction grows each year, and that they're eager to requalify every 3 years at renewal time.

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

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No File Uploaded

fileUpload3

Download File (<https://caiawards.secure-platform.com/file/16798/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWVpYUlkIjoxNjc5OCwiYWxsY3dOb3RtaWduZWRVcmwiOiJGYWxzZSIsImlnbm9y2024%20Seal%20Judging%20Scoresheet.xlsx>)

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Would you like to share a link?

<https://www.cai-nc.org/page/CommunityAssociationsofExcellence> (<https://www.cai-nc.org/page/CommunityAssociationsofExcellence>)

Thank you for your submission! We encourage you to submit another program in a different category.