

Application: 222

Hall, Laura

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Submitted By

Hall, Laura

Email Address

laurah@COMMUNITYMGT.com

Chapter

Western Oregon chapter

Chapter Size

Medium (251-500)

Category

Member Services

Goals and Objectives: 30 Points

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

2017 was a challenging year for the Western Oregon Chapter. The Board went through significant financial difficulties due to several unexpected events. This included the loss of our treasurer, secretary and stagnant events with declining participation. The Chapter also had an inefficient sponsorship package. Furthermore the Central Oregon Regional Council broke away from the Oregon Chapter causing the Chapter to lose more than 50 members, which for a medium size Chapter is a significant loss. This critical situation forced the board to draw \$10,000 out of its reserve savings to maintain operations of the Chapter.

But there is light at the end of the tunnel!

The Board was determined to think of a solution that could generate considerable revenue to assist in the Chapter's growth.

While considering a solution, the Board identified one of the issues for managers was the opportunity to get in front of the right vendor. On the flip side, this provided an opportunity for our vendors to have direct access to managers. Out of this idea, the Reverse Trade show was created.

Main goals were:

*Create an event that generates revenue for the Chapter.

*Bring managers and business partners together for a day of face-to-face discussion and to provide education regarding services and products.

*Attract new business partners as well as gaining exposure within the community.

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

The Reverse Tradeshow's objective was to create a forum where vendors and managers could address questions and discuss available services.

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The Western Oregon Chapter created an event that is mutually beneficial for all parties. The Chapter acknowledged the limited resources of managers with regards to time and availability. The Reverse Trade Show provided managers with exposure to different vendors, conversely, our vendors were able to make new contacts and grow their business. In turn this also benefits CAI as we are introduced to new BPs and can grow our Chapter.

In light of the struggles the Chapter had been through it identifies the value in fostering existing relationships within the industry. Our Chapter Executive Director used the Reverse Trade Show as an opportunity to grow relationships and strengthen communication by connecting individually with each management company.

To get the necessary participation from our industry partners we understood we needed to heavily promote the Reverse Trade Show within the Chapter. To do so, we engaged the following strategies. We identified key advocates within the organization that would sponsor the event and market the Reverse Trade Show to their peers. We sent strategic email communications to targeted audiences to support and educate on the upcoming new event. Finally, we rolled out the event officially at the Sponsorship Breakfast positioning it as the "Can't Miss Event of the Year".

Before introducing a new event, The Chapter needed to assess its capacity to withstand another event that required sponsorship dollars and participation. Once we assessed the Chapters financial situation we determined our monetary goal for this event, keeping in mind the repayment of the Chapter's reserves. We aligned the revenue requirements to reflect the needs of the Chapter and the economic capacity of our Business Partners.

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 revenue for the Reverse Trade Show would be generated by registration fees for attendees and other sponsorship opportunities. The base cost for each Business Partner was \$400 per attendee and we projected 35 Business Partners to attend. Along with registration income the Reverse Trade Show had \$4,400 in additional sponsorships the first year.

Expenses were limited to space rental and light refreshments. The minimum rental fee was \$2,500.

First year projections:

Estimated Income Projection \$18,400

Estimated Expense Projection \$2,500

Estimated Event Net Revenue \$15,900 for the first year.

*Please refer to attached graph for further detail.

What marketing techniques were used? (10pts)

As we outlined in our strategies, the Chapter was very thoughtful in its marketing of this event. It was identified early that managers were key in the success of this event.

While social media is such a driving force in our industry, we identified the value in personal relationships and human contact. Considering this, the CED set up physical appointments with management companies to promote the event and get verbal commitments, which was a huge success. This again stresses the importance of face to face connections and communications.

We made announcements at every event leading up to the Reverse Trade Show. There were a lot of unknowns the first year relating to size, space and attendance, so we stressed the important of first come first serve for our vendors.

The Chapter leveraged social media and email campaigns to consistently communicate the event and keep it in the forefront of managers and business partners minds.

The Reverse Trade Show provided CAI an opportunity to extend its influence and reach out to new vendors and prospective Business Partners in the community. The Chapter invited these new contacts with the hope of potential membership and increasing value for managers.

Who was your target audience? (10pts)

The Western Oregon's Chapters events are typically focused on HOA Board members and Homeowners. However, the Chapter saw a need for an event targeting managers and Business Partners, as they are also key for Chapter growth and sustainability.

We identified the pain points for both managers and BPs and tried to address them through the Reverse Trade Show. Managers have pressure from their HOA clients to provide premium services and expert knowledge. They are managing multiple relationships and communities. Business Partners have a hard time getting access and undivided attention from managers. This event solves both problems. Business Partners are always looking for new opportunities to meet managers and build relationships; however, it is very hard to get to everyone.

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

One year before the creation of the Reverse Trade Show the Chapter researched ways to increase revenue and leveraged the experience of another Association in the Portland area that puts on a similar event. Based on the information gathered from the local association, the CED identified key areas of involvement from the Chapter for a seamless implementation in to the Western Oregon CAI.

The areas of implementation were carried out by different committees within the organization. The Events Committee was responsible for reaching out to new vendors and ironing out details for the "day of" event. The Marketing Committee was in charge of social media posts, flyers and e blasts. The e blasts were strategically scheduled to remind membership of the new upcoming event as well as provide education about the Reverse Trade Show. The Sponsorship Committee was in charge of promoting and selling sponsorships as well as rolling out the event at the Sponsorship Breakfast in 2018.

The Events committee teamed up with the marketing committee to design a catchy flyer that would be sent out via email blasts and featured in social media campaigns. The Events Committee made sure to have a member at every luncheon to do an announcement about the Reverse Trade Show. Further, our CED was very enthusiastic when business partners inquired about CAI and how the Chapter offered to grow their business. The CED and a couple members of the Events committee were in charge of securing the location, picking out the menu and making sure the event was set up and efficiently coordinated.

The committee came up with rules and procedures for the business partners to follow which included: No swag except for the designated sponsors, following the 5 minute time limit to talk to managers, respecting the space around other competitors when it was their time in front of specific managers and encouraging business partners to purchase drinks for managers.

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)

As a reminder, our main goals were as follows:

*Create an event that generates revenue for the Chapter.

*Bring managers and business partners together for a day of face-to-face discussion and to provide education regarding services and products.

*Attract new business partners as well as gaining exposure within the community.

Our overall financial position was improved significantly by having this new event. Our first Reverse Trade Show brought in \$16,850. This met our expectations and some. Please see attached graph for specific break down. The second year we were able to profit \$18,400 breaking our record of highest profitable event in the history of our chapter.

The event brought in local management companies that have never participated in CAI before. We also introduced new vendor members to our industry. These vendors became preferred Business Partners for managers as well as members of the Western Oregon Chapter. This also contributed to the Chapter's collection of eligible sponsors making our organization more financially robust.

In conclusion, the first Reverse Trade Show brought in 10 new Business Partners and 5 management companies that had not previously participated in CAI. Since then, said vendors have joined and the management companies are now heavily involved in the Chapter as well as participate in the Reverse Trade Show every year. The year following brought in even more management company participants as well as additional new vendors.

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

As with all events, there is always room for improvement.

While the first year was extremely successful we immediately identified room for improvement. The space was not put together efficiently for a good flow. Also, we allowed too little time for BP's to visit with managers. We moved the time up to 6 minutes instead of 4.

The second year that we did the tradeshow we implemented a few changes due to feed back which included increased bartenders for faster drink transactions, table arrangements for better organizational flow and better signs to direct business partners trying to locate specific managers and companies.

Further, the Events Committee is working on improving the way in which committee members provide refreshments for managers. This allows managers to stay with their booths and talk to vendors, while committee members run refreshments. Many of the vendors were offer to buy drinks, which makes it easier.

The Committee is now discussing moving locations to accommodate more managers. It could mean we need to increase prices for each business partner that attends to balance out the additional expenses for a larger location. Since 2020 has already been planned and is upon us, we will look at this for 2021.

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

This event is now one of the focal events for our Chapter. It helps bring in prospect members and adds value in the following ways:

1. It has given us the ability to come back from a difficult financial situation. It now allows us to have more flexibility with other expenses such as our employee benefits package.
2. It has improved communication between managers and business partners.
3. There is excitement with management companies and managers. Also, it allowed for managers to network with each other and share ideas. Managers in our community had not communicated with each other very much or very well in the past. This ultimately increased our Chapters volunteer participation.
4. There is an increased recognition in the community and an increase in new business partner members.
5. It has become the largest fund-raising event for our Chapter.

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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