

Application: 100

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Chapter

California North Chapter

Chapter Size

Medium (251-500)

Category

Leadership

Goals and Objectives: 30 Points

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

The L.E.A.D. Leadership Education & Development Workshop was designed to bring together the Board of Directors and the Chapter Leadership in order to discuss the strategic goals for the future of the organization. It was important to the Board that the entire Leadership was present to discuss the new Policies & Procedures document, the goals for Chapter growth, and how everyone contributes to the Chapter as a whole.

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

In order for this event to happen the Board needed to make sure the new Policies & Procedures document was completed, the event location and time was selected months in advance, and an outline and rough draft of a presentation presented a least three months prior to the event. The Strategy was to give all the Leaders enough time to mark the date on their calendar

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)

Because this training was not included in the 2018 Budget, we kept costs low by having the event in the morning before our November Educational Luncheon, and provided the Leadership Team with pastries and coffee, and were given the room complimentary from our hotel venue because we were hosting the luncheon there. Luckily, our November Educational luncheon was the largest educational luncheon the chapter has ever had (topping over 180 attendees) and the sponsorships we sold more than helped pay for the expense.

What marketing techniques were used? (10pts)

We created a marketing logo specifically for this training session. We wanted to make sure that the Committee Chairs and Board of Directors felt like this was an actual event, like our other events, because it was – it was an event for the current and future leadership of the Chapter. We also created a brand new slide deck (also included) for the workshop, using modern images and fonts.

Who was your target audience? (10pts)

Our target audience was the current and future Board of Directors, as well as all of the Committee Chairs. This was important because many of the Committee Chairs have been serving within the Chapter for as long as the Chapter has been in existence – the leadership within the Chapter not only have a career stake in their devotion, but they genuinely care about its success. It was very important that we have all of our leaders in one room to go over the succession planning goals and policies and procedures changes so we could get their input on the future of the organization. We are proud to say everyone attended.

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

The idea began in April with the Board of Directors. Previously, there had been a short meeting where all Committee Chairs were asked to sign a Conflict of Interest and a Leadership Promise, and then given their budgets, etc. at a later date. In April, the Board and the Executive Director discussed making this transition process, along with the developing Policies and Procedures document, and actual event for the current and future chapter leadership. From there, the Executive Director, President and President Elect developed a timeline, an outline of discussion (attached in application) and a marketing image to send to the Leadership with the calendar invite. Over the next few months the outline was polished, and by August a draft PowerPoint was done. All of the Committee Chairs and Board of Directors were emailed a calendar invitation in August, so that they had plenty of time to save the event date (November 15th). It was also important to the Executive Team that the Chairs not be overly inconvenienced in attending this event – they were already volunteering a lot of their time serving, and the Board did not want them to feel strained in adding this to their already busy November schedule. So, after much deliberation, the LEAD workshop was held in the morning before the November Educational Luncheon (to which all of the leadership – Board and Chairs included – attended). Ultimately, from process to completion, this event took around six months to establish, and was a huge success.

Results and Evaluation 25 Points

Briefly describe the methods used to determine the program's success as it relates to your goal(s) (5pts)

This workshop was the culmination of months of work by the Board of Directors. It was a chance for the Board and Leadership to come together and review the strategic succession planning goals outlined in their new Policies & Procedures Document, but more than that – it was an opportunity for the Chapter to have its most influential, dedicated and passionate volunteers in one room together to discuss the Chapters future, and how everyone was going to work together to get there. The Board considers this event an extreme success, not just because every single leader was in that room discussing the future, but because for the first time in the Chapters history there was a concrete document to help to achieve those goals, and so many member focused changes that everyone was revitalized in their excitement to continue working within the organization.

Using specific examples, tell us how you measured success. (10pts)

It is hard to measure success on something that is technically the oven for the success cookies, if you will. This event was to bolster the Chapter leadership while also educating both the Board and Committee Chairs on the strategic plan for the Chapter, and while everyone attended (which we consider an extreme success) we will not see the cookies of our labor until later on in 2019, to see what the leadership does. Ultimately, the Board and Chairs walked away with a better understanding of how they specifically fit in with the Chapters long term goals, and encouraged in their roles as Leaders within the Chapter.

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

It would be beneficial to increase the amount of time allotted for the event. We finished, but another thirty minutes for more dialogue should be entertained. It was also discussed that an alternate venue be considered to pull the Leadership Team off site. The Board is extremely open to improvements and supporting the Chapter leadership.

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

No organization can be successful without strong leadership. It was important to the Board of Directors that their Committee Chairs be as informed as possible about how their specific committee fits into the overall Chapter strategic plan. The workshop went over the importance and assistance CAI National provides – from the online articles for the Magazine to the Foundation for Research. It was due in part to this event and the wonderful information provided from the Foundation for Research that the Board decided to donate to the Big Picture Campaign in 2019, something not previously done. The event helped to spotlight the interconnectedness of the committees, from Membership to the Board of Directors, and how each of them plays a vital role in the Chapters future.

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