

Application: 042

Lockett, Cal

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Chapter

Coachella Valley

Chapter Size

Large (501-750)

Category

Chapter Management and Development

Goals and Objectives: 30 Points

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

CAI-CV Classroom Project

Goal

To expand CAI-CV's educational outreach by building a new office with a classroom capable of holding 50 students.

History

CAI-CV is 38 years old and for more than 25 years, its small office was located in an industrial park. Trucks loading and unloading in front of the office, sometimes four times a day, blocked the front door and signage. Providing members could find the office, it was suitable only for small meetings. All classes and educational programs, as well as events, had to be held elsewhere, many times at costly venues.

Two years ago, the board decided to begin looking for new office space. During strategic planning in 2016, a decision was made to find an office that had a classroom capable of holding up to 50 students, in an effort to expand CAI-CV's educational programs and outreach.

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

With the 2016 strategic plan in hand, the board engaged a commercial real estate broker and appointed a subcommittee of the board to explore various office locations.

After reviewing some options with the broker, the board developed a list of requirements and budget.

Eventually, several locations were found so the board engaged an architect to ensure the space could be adapted for a classroom.

The board eventually settled on the following strategies: To find a location central to the Coachella Valley that would be easily reachable for all members. The space would be in a professional office building and would be between 2,000 and 2,500 sq. ft. The monthly budget would be close to twice the current rent. Moving costs, furniture and any build-out needed would be paid with the Chapter's savings.

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's treasurer (Jolen Zeroski, CMCA, from Union Bank) worked with the Chapter's CED (Cal Lockett) and outside financial consultant, (Palm Desert Mayor Susan Marie Weber) to develop a budget.

Beginning in 2017, the Chapter set aside \$1,000 per month to help pay for the eventual move. Most of this money was paid to the architect and for City permits.

New rent: a budget of \$2,600 was established that would be paid with savings from producing Quorum Magazine in-house with the Chapter's new printer.

Moving costs and build-out: \$75,000 would be paid with cash from the Chapter's savings. The board also solicited business partner members for services that saved thousands of dollars.

New furniture and equipment: \$25,000 paid with cash from the Chapter's savings and from fundraising efforts through the 2018 advertising and sponsorship plan (marketing plan).

What marketing techniques were used? (10pts)

When the board decided to look for a classroom, it was based on decisions made during strategic planning and from information gathered from members with a survey.

Updates in Quorum Magazine

Once a space was found and the board knew a classroom was in the works, they began placing regular updates in Quorum Magazine that goes out to all members.

Updates Online

The CAI-CV Communications Committee provided photos of the work in progress on the Chapter's website, Facebook, and Instagram. They also produced several YouTube videos that were linked to Facebook and the Chapter's website.

Updates via Email

Regular updates with photos were made to members using the Chapter's email.

After Move Feature Article

After the Chapter office was moved and the classroom was operational, the board did a cover feature in Quorum to make sure all the members knew of the new classroom.

Who was your target audience? (10pts)

Outreach to current members

The new classroom was built to hold the following classes:

Managers

Manager on the Run (MOTR) - 1 CEU Course offered six times annually

Assistant Manager on the Run - offered six times annually

CA CID Law Course - 8 hour course offered twice annually

CAI National Courses - in 2019, CAI-CV will ALL the prerequisite courses for a manager to become a PCAM, the M-100 and all the M-200s.

CAMICB's CMCA prep course and exam

Homeowner Leaders

Board Member Workshops (BMW) offered two times per year

In-depth legal review - two hour course offered once

Board Basic Training - two hour course offered eight times per year

Board Leadership Development Workshop - offered once

HOA Board Councils - monthly meetings

Business Partners

Summer Sizzler Mixer offered once per year

Educated Business Partner course offered twice per year

Various marketing opportunities for individual class sponsorship and for the classroom itself.

Outreach to New Members

New member orientations (offered twice per year)

Community Association Management - Career Day - offered once per year

Community Outreach

We are offering our classroom to management companies and HOAs for their meetings. We are also offering the classroom to other nonprofits. Currently, the Palm Desert Chamber is using our classroom every Tuesday morning for their Business gathering.

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

The board set the strategy in 2016 to begin looking for new office space that would include a classroom.

Hiring a Broker

In January of 2017, a subcommittee of the board was appointed to work with an outside commercial real estate broker to find suitable space.

Criteria

Also in January, and based on survey input from members the subcommittee established the following criteria:

Centrally located

Professional building (not industrial)

Plenty of parking

Enough space for a classroom for 50 students, a CED office and space for the admin, and if possible, separate space for committees to meet, and a bathroom.

In February, 16 locations were found that might be suitable. The board members drove by each and gave their feedback at the February board meeting. The top location was selected.

Meeting with the Building Owner and Broker

By the end of February, discussions began with the owner over build-out costs and rent. Negotiations were handled by the CED and Broker and updates were given to the board as needed.

Hiring an Architect

Also in February, an architect was hired to determine how much space was needed and how to structure the floor plans. In March, it was decided that due to the high costs of the build out and the building owner's refusal to pay enough of the costs, that the search for space would be restarted.

New Location

The subcommittee decided to focus their search on the area closest to the freeway so that members could easily commute from Palm Springs or Indio. The subcommittee chose four new locations and board members drove by and provided feedback. In early March, a location was chosen and negotiations began.

Budget Review

The board reviewed the proposed expenses against their original budget and determined the new location would work. The architect drew up floor plans and rent was negotiated.

Contract Signed

A contract was signed with the building owner to move to the University Commerce Center's front building that was all professional offices.

Printer Contract Signed

At the same time, the board signed a lease for the new printer that would allow the chapter to save about \$1,500 per month by printing Quorum Magazine in-house. This made it possible for the chapter to pay the new rent.

Build out

The board reached out to the Chapter's business partners for help with the build out and to save costs. In April, the building's owner selected CAI-CV member, Vantage Point Construction. Vantage Point offered the Chapter a \$10,000 discount. CAI-CV member Flood Response agreed to do the dry-wall work in exchange for marketing at events. Vista Paint donated all the paint. AMS Security agreed to do put in the alarm system in exchange for advertising in Quorum. The build out was completed in December of 2017. Signarama created the sign for the outside of the building. The CED and Broker provided oversight to the building project and gave the board regular updates.

Furniture, Wiring, Electrical & AV

In November, the Chapter hired a professional AV installation company to oversee the wiring for WiFi, computers, telephone system and AV equipment. A new monitor for the conference room, AV projector and kitchen refrigerator, microwave and dishwasher were purchased on Black Friday, saving the chapter thousands. A commercial telephone system was purchased and installed and special electrical was pulled for the new printer. Furniture was purchased through a CAI-CV business partner.

Move

On December 31st, we moved out of the old office and into the new office. We hired a moving company to move everything over to the new building and to take old furnishings to a charity. Unpacking commenced and the office was up and running by Tuesday, January 2nd.

Updating Information and Informing Members

The staff immediately began updating all of the Chapter's information on websites and with vendors and members. They also printed new business cards, stationary and collateral material for the chapter.

Results and Evaluation 25 Points

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

The board looked at two major aspects of the move to determine it's success. The first was financial feasibility, and the second was the ability to expand the chapter's educational programs in the new classroom.

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

Financial Feasibility

The financial success of the move and building a new classroom was determined by looking at several components:

The building of the classroom was done on time and within the approved budget.

The ongoing rent of the new office space is within the approved budget.

The furnishings, computers and AV equipment were purchased within budget.

The income saved by printing Quorum Magazine has indeed saved about \$1,500 per month.

Use of the New Classroom

In 2018, the Chapter doubled the number of classes offered to managers and homeowner leaders. The new classroom was also used by management companies, associations and other nonprofits for meetings throughout the year.

Based on these two criteria, the classroom building project was a huge success.

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

The CAI-CV Board just completed another strategic planning session and has made the following recommendations for the new classroom:

In 2019, the chapter will try and host at least one course for managers and one course for homeowner leaders each month.

The chapter will offer the new classroom to associations for annual meetings.

The chapter will try and secure more classroom sponsors to increase its ability to offer scholarships to CAI-CV members who attend CAI national courses.

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

Moving to office space that includes a classroom has served to refocus the Chapter on education and serving our members better.

We doubled the number of courses offered to members in 2018 and will add even more classes in 2019.

Specifically, the Board Basic Training and Assistant Manager on the Run programs are new and are low cost to managers and assistants and the Board Basic Training is free to board members. Board Basic Training will be offered seven times this year and Assistant Manager on the Run will be offered six times.

Allowing boards and management companies to use the classroom for their educational programs creates real value for these members.

Offering the classroom to outside groups like the Chamber Business Group gives CAI-CV visibility with potential new members.

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