

Application: 043

Lockett, Cal

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Page: Entry Information

Submitted By

Lockett, Cal

Email Address

clockett@cai-cv.org

Chapter

Coachella Valley

Chapter Size

Large (501-750)

Category

Leadership

Goals and Objectives: 30 Points

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

HOA Living Brochure

The purpose of developing the HOA Living brochure was to provide an educational look at all aspects of HOA living so that all CAI members and residents in associations have a common understanding about their rights and responsibilities. The brochure provides best practices for managers, association board members and businesses that support HOAs. The brochure was designed to be given out to anyone involved with community management and to be used by cities and realtors to help residents know who to turn to when they have questions or needs.

The brochure provides:

Basic training about HOAs for managers, assistant managers, board members and businesses.

Help for managers trying to educate boards and residents.

Help for boards attempting to educate residents.

Help for boards and managers trying to explain HOA living to businesses.

Help to cities to educate residents who is responsible for what.

Help to Realtors to educate potential buyers about living in an HOA.

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

Background

CAI-CV began discussing the HOA Living brochure with the City of Palm Desert in early 2017. The City came to CAI-CV because it was concerned about the number of residents who came to them for help solving issues that are really the responsibility of the homeowner's association. Eighty percent of Palm Desert's residents live in HOAs.

Conduct Research

CAI-CV's Public Relations (PR) Committee began the process of researching CAI national collateral materials and other writings to determine if something already existed that the City could use to help residents.

Contact with the City of Palm Desert Communications Office

Members of the CAI-CV PR Committee met with the head of the City's Communications Office to collect more data about the problems they wanted to solve with CAI's help.

Board Review

The CAI-CV board reviewed the PR Committee's proposal and determined the brochure could serve as a resource for all its members and help with building bridges to Realtors and other cities.

CAI National Overview

CAI-CV contacted CAI National to oversee and collaborate on this project so the brochure could be co-branded with the national office, giving the brochure added credibility.

City Council Review

CAI-CV provided the completed brochure to the City Council of Palm Desert and they have determined a number of uses for the brochure and are grateful to CAI-CV for our help solving this problem.

2019 CAI-CV Strategic Planning

At our recent strategic planning session, many new ideas surfaced for maximizing the use of the new HOA Living brochure to positively impact managers, businesses and board members involved with this industry.

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)

In February, the PR Committee proposed to the CAI-CV board a budget of \$2,000 for this project as follows:

Purchase of CAI National materials: \$200

Brochure design fees: \$1,200

Printing costs: \$600

The board approved the budget at the February board meeting.

The cost of printing the brochure was \$.24 each.

The CAI-CV board agreed to pay for the development of the brochure and the first 200 copies for the City of Palm Desert. The City prepared their own budget of \$5,000 for additional copies and that budget was approved by the City Manager.

The Chapter Board has also approved a budget of \$1,000 to provide the brochure to CAI-CV members as requested.

Two major management companies have ordered copies for their community boards and paid for these copies.

What marketing techniques were used? (10pts)

The brochure was announced in Quorum Magazine during its development and updates were provided periodically.

A copy was given to the Real Estate writer for the Desert Sun newspaper. They were favorably impressed and asked for copies to distribute.

The brochure is being distributed by the City of Palm Desert to any residents who inquire about issues related to HOAs at their information desk. The brochure is also available to vendors who file for a business license with the City of Palm Desert.

The finished brochure was distributed at all CAI-CV events since November and copies given to each of the Chapter's committees.

Copies of the brochure were given to the Palm Springs Regional Association of Realtors who have asked us to create a Coachella Valley version for their use. It is being given to new residents who purchase homes in HOAs and is offered to local Realtors through CAI-CV member Palm Springs Regional Association of Realtors.

Meetings have already taken place with the City of Rancho Mirage, Palm Springs, Indio and La Quinta to develop their own versions of the brochure.

Meetings with the Rancho Mirage, Greater Coachella Valley, and Palm Desert Chambers have taken place and there is interest in producing a version for the Chambers to distribute.

CAI-CV's Professional Managers Committee has distributed copies to the Coachella Valley management company CEOs to pass along to managers of communities in Palm Desert.

Who was your target audience? (10pts)

The brochure was designed to empower CAI-CV members to provide assistance to the following audiences:

Managers - to help managers educate assistants, vendors and residents about association living.

Homeowner Leaders - to help educate other board member, committee volunteers and residents about association living.

Business Partners - to help educate employees who work in HOAs.

Cities - to help educate residents who come to the city asking for assistance.

Realtors - to help educate Realtors and residents interested in purchasing in HOAs.

Newly discovered audiences are: Chambers of Commerce

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

Initial Meeting with City of Palm Desert

In January of 2017, CAI-CV received a call from the City of Palm Desert asking for a meeting to discuss a problem they were having. They were getting inundated with requests for help from residents on issues they had no jurisdiction. They had done their own research showing that 80 percent of Palm Desert residents live in HOAs so they saw this problem getting worse if no solution was forthcoming. Several negative stories including hot issues like short term rentals had been published by the local newspaper and the City was in the middle of controversy. The call was referred to the PR Committee. The meeting was quickly set and the CED and several members of the PR Committee attended with the City Manager and Communications Officer. At the meeting, the City Manager said they needed help explaining to residents in HOAs (and the media) about who is responsible for what. At subsequent phone meetings, ideas were exchanged about crafting a co-branded brochure with the city that would attempt to address their concerns.

Board Approval

The PR Committee created a proposal for the board to consider that included a \$2,000 budget, which was approved. The board asked the Committee to try and create a brochure that would solve the City's issues and would also serve as an educational piece that would empower CAI-CV members to effectively educate new members, other HOA practitioners and the residents our members serve.

PR Committee Research

The PR Committee used part of their budget to purchase a dozen brochures from CAI National and delegated review among all the committee members. At their March meeting, they provided these brochures after highlighting the key messages and prioritized the messages. Here are the sources that were used:

Good to Great Brochure,

Community Associations Institute

Rights and Responsibilities for Better Communities, Community Associations Institute

Model Code of Ethics for Community Association Board Members, Community Associations Institute

Community Association Fundamentals, Community Associations Institute

Community Association Governance Guidelines, Community Associations Institute

Introduction to Community Association Living, Community Associations Institute

Crafting the New Brochure

Here is a brief recap of the process taken to develop the brochure in April and May.

The office staff placed the highlighted messages from all the brochures into one document and began the process of editing. The draft brochure was then ready to be reviewed by some attorney members and was edited again to include California legal information. This version was then distributed to the CAI-CV board for input and was edited again. After CAI-CV had edited the final version, it was given to the City for their input and edited again. After another legal review, the brochure was given to CAI National for their input and blessing. After making these revisions, there was another legal review and the brochure was proofed and completed.

Design

The PR Committee contacted many of the associations in Palm Desert explaining the purpose of the brochure and asking them to send photos. The City of Palm Desert also provided photos. Rodney Bissell of Bissell Design Studios provided a layout for the Committee to consider. Edits were made and photos replaced until there was unanimous agreement. A copy was sent to the CAI-CV board and to the City for final approval, which was obtained in September.

Distribution

The HOA Living brochure was reprinted in Quorum Magazine, copies were given to the City to hand out, and it was placed on the CAI-CV website. Copies were also distributed to CAI-CV's Homeowner Leader Committee, Education Committee and the Professional Managers Committee.

Budget Review

The HOA Living brochure was completed for \$1,800, under budget. The cost per brochure is \$.24 each and the City of Palm Desert said they would pay for all future printings.

Results and Evaluation 25 Points

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

Because this is a collaborative project with CAI-CV, the City of Palm Desert and CAI National, its success relied on agreement of all three entities. Given the need for and nature of the brochure, agreement was easily obtained. To our knowledge, this is the first time CAI National and a chapter have co-branded a publication.

Another primary method to determine the brochure's success was whether the City would order more copies. They have ordered a second run and informed us that they plan to order thousands more. Additionally, we have printed hundreds more for other audiences including Realtors, management companies and associations wanting to educate their residents.

The CAI-CV board wanted the brochure's success to be determined on whether those involved in the HOA industry found it helpful to educate each other and residents. Feedback from the Professional Managers Committee and Homeowner Leaders Committee has been outstanding.

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

Successful Collaboration

The board of CAI-CV, the Chapter's PR Committee, the Palm Desert City Council, City Manager, and City Attorney and Communications Office, and CAI National, all collaborated on this brochure and agreed to its contents and design.

Expanded Distribution

The City has ordered thousands of copies after the initial run because it is working to solve their problem. Many other members have ordered copies for their constituents.

Impact on Management Company Members

After the brochure was distributed to CAI-CV members, the Chapter received an order from one major management company for 300 copies to distribute to each of their association board members. Other orders have been received for two additional management companies for hundreds more. Copies were sent to all local management companies and the feedback has been outstanding.

Impact on Managers

The Chapter's Professional Managers Committee has begun distributing copies to managers who need help explaining basics to homeowners and board members. The feedback from managers is outstanding.

Impact on Homeowner Leaders

The Chapter's Homeowner Leader Committee has made the project of distributing the brochure to board members a priority. They have already handed out more than 100 copies at their meetings.

Impact on Business Partners

The Chapter's Business Partner Committee is offering the brochure to all new members and encouraging business member to use the brochure to educate employees about HOAs.

Impact on Realtors

The Palm Springs Regional Association of Realtors has joined CAI-CV and is working with CAI to develop a brochure that could be used Valley wide by Realtors.

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

The HOA Living brochure appears to be a great success. There is nothing like it available to our members and the constituents they serve.

At the Chapter's most recent Strategic Planning session, the board budgeted to expand distribution of the existing brochure and to approach other Coachella Valley cities to see if they want to do something similar. There are nine cities in the Coachella Valley. We envision a version being created for each city.

We believe that other CAI chapters can benefit from this brochure. We have told CAI National that we will provide the print version of the brochure to any chapter to use for free.

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

There are many planned and some unplanned positive consequences to the PR Committee's work to develop the HOA Living Brochure. We helped the City of Palm Desert address a major problem they were having with HOAs and the media. We empowered our own members with a document they can use to explain the industry to co-workers and others. We have raised the visibility of CAI as the authority on HOAs in the Coachella Valley. And, we have created a brochure that other CAI chapters can use for their own outreach efforts.

Please see December 24, 2018 letter from City of Palm Desert - attached.

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