

Application: 062

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Page: Entry Information

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Chapter

CAI-IL

Chapter Size

Very Large (over 750)

Category

Public Affairs

Goals and Objectives: 30 Points

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

The main goals of the Dedicated Community Association Leader (DCAL) program were to:

1. Offer HL members complete education in the daily operations and issues they face within their association and in federal, state and local legislation with the understanding that educated homeowners will help build better communities.
2. Provide Homeowner Leader (HL) members with a way to connect with other members to learn from each other and collaborate on ways to improve their communities.
3. Publicly recognize CAI-IL's HL members for their commitment to promoting positive living within their associations by educating themselves on all aspects of their fiduciary responsibilities.

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

1. Illinois homeowners have a variety of places where they can become educated: law firms, management companies, other associations, and online. CAI-IL had a strategy to create free access for CAI IL HL members to 22 hours of complete education. Doing so makes CAI IL the only source where HLs can go for a complete, robust education series which educates them on all aspects of association operations. The strategy was to additionally offer courses in person and online to reach as many HLs as possible.

2. We consistently hear that HLs are looking for a "support group" to help them understand the intricacies of running their communities. The chapter offers time during CAI-IL's DCAL courses for attendees to socialize over cookies and coffee and exchange information to continue talking in the future. CAI-IL invites DCALs to participate in other events so they can meet more members and become more engaged. CAI-IL helps them collaborate to build better communities.

3. Recognize HLs who complete all 7 core courses by inviting them to a recognition ceremony at the Conference & Expo, printing their names in Common Interest quarterly magazine, sending them a completion certificate and magnetic name badge, and highlighting their accomplishment in articles. Elevate CAI to be the only organization promoting homeowner education and recognition at this level.

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)

As a homeowner education program, the budget is not developed as a main profit center. Each of the seven core courses, the advanced course, and the webinars are budgeted separately. Sponsors cover cost for education materials, mailings, and brochure printing. Members attend the courses at no charge as a benefit of membership and to encourage education and CAI involvement. Non-members pay a small fee to attend classes and at the end of the year, there is a small net income (See attached budget).

What marketing techniques were used? (10pts)

The DCAL committee worked with the Marketing committee to develop four marketing pieces that were used throughout the year to promote the program:

1. A tri-fold brochure (See attached brochure) to be distributed at education events and trade shows, and mailed to new and prospective members.
2. A magazine article to be printed in CAI-IL's Common Interest Magazine (See attached article).
3. A letter to send to management companies that they can use to promote the program when a person is newly elected to a board (See attached letter).
4. Additionally, the program is marketed by publicizing the names of DCAL recipients in Common Interest Magazine, in social media, and by recognizing them publicly at the chapter's Conference & Exposition (See attached article).

These pieces have helped the program grow since its inception. In 2013, the first year of the program, we instructed 67 people. In 2018 we provided training experiences to 167 in-person and webinar participants, more than doubling the program participation with a 149% growth rate.

Who was your target audience? (10pts)

There are three target audiences for the DCAL program:

1. The primary audience is Homeowner Leaders. The people living in and running their associations are the ones who crave education on how to build better communities and run their associations more efficiently.
2. Within the HL audience we have two sub categories: Board Members and Homeowners. Current Board Members need the education because they are presently dealing with association management and concerns. However, there are homeowners who may consider running for their boards but don't feel like they know enough to do so. These homeowners are perfect candidates for the DCAL program because they can take classes until they feel ready to be on the Board of Directors.
3. Also within the HL audience we distinguish between CAI-IL members and non-members. Members take the courses for free and are encourage to budget for education or association membership within their associations. Non-members do pay a small fee per courses and the pricing is structured so that after 3 courses, membership is a more cost-effective route. Additionally, although membership is not required to just attend classes, membership is required to earn the DCAL recognition.

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

The DCAL committee implemented the program with the following steps:

1. Created a logo
2. Completely wrote the content for six courses and redesigned The Essentials course to a 1/2 day format for DCAL purposes, all within the first year of DCALs inception.
3. Reviewed content at meetings and every course was submitted to the chapter's Education Commission, which includes an attorney and a Community Association Manager, 60 days prior to registration release.
4. Carefully selected instructors as they needed to "teach" not just "present" the standardized material.
5. Created a student handout, instructor's guide, Powerpoint presentation, and quiz for each course and material was reviewed 60 days prior to registration release (See sample instructors' guide). CAI National books on Parliamentary Procedure and Conducting Successful Meetings were included for every participant.

The CAI Staff helped implement the program with the following steps:

1. Scheduled each DCAL course to be taught at least once during 2018.
2. Graded attendee quizzes to make sure they achieved a score of 70% or better. Sent results and completion certificates within 2 weeks of the course.
3. Recorded the courses as webinars and offered them for those who were unable to attend in person.
4. Tracked registration, participation, and quiz grades (See attached portion of DCAL Master List spreadsheet).
5. Sent DCAL packets to those who earned their DCAL, including a letter of congratulations, a certificate of completion, and a magnetic name tag they can wear at CAI and association events (See sample congratulations letter, certificate, and name tag).
6. Invited DCALs to the Conference & Expo to be recognized publicly and encouraged them to participate in chapter activities like running for the Board of Directors, writing for Common Interest Magazine, and making Membership Ambassador welcome calls.

In 2018, we expanded the DCAL program to include two Advanced Financial Management courses. Attendees are required to have taken the core Understanding Financials DCAL course as a prerequisite. Thirty-two (32) attendees took advantage of the Advanced courses in 2018.

Results and Evaluation 25 Points

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

To determine program success, we looked at overall DCAL participation numbers. Because we believe that the DCAL program stretches beyond education and expands in a broader way to building better communities, we also looked at other CAI involvement and how vocal participants are about the program and about association issues and communities.

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

Program Participation--To date, there have been 984 course participants, with 382 individual people who have taken at least one DCAL class and 35 who have taken all 22 hours of the core courses to earn DCAL recognition (See photo). This represents a significant number of members that are being educated on relevant association issues and who are advocating for better communities (See attached testimonials). Additionally, twenty-one (21) people have chosen to take at least one of the Advanced Financial Management courses, furthering their education and individual course attendance has increased from an average of 11 attendees to an average of 22 attendees.

Connections--Since the start of the DCAL program, HL event participation has increased, thus increasing member connections. Because we now offer DCAL courses at the Conference & Expo, homeowner members stay afterward to attend the large, 500-person networking reception. HL members attended the Golf Outing, Summer Social, and Winter Gala, events they had not traditionally attended in the past. We even had several DCAL participants attend the CAI National Conference. The connections they have made make them feel more a part of the CAI family so their participation is higher.

Homeowner Leader Involvement--Since the inception of the DCAL program, we now have three DCAL recipients on the Board of Directors and one more Board Member who is working toward their DCAL. We have two DCAL members who have written articles for Common Interest Magazine and one who is participating on ILAC. Three DCALs have volunteered to make Membership Ambassador welcome calls. We now have DCAL members attend the chapter's Summer Social and Winter Gala events, which never happened in the past. The DCAL program has shown them that CAI is the place to be to learn, connect, and work together to build better communities.

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

Plans for continued DCAL program improvement include:

1. Promote the DCAL program heavily throughout the year at the Conference & Expo, in Common Interest Magazine, via the website, through social media, in emails, and at other trade shows and events.
2. Thoroughly explain CAI's role in advocating for better communities and explain how DCAL participants can get more involved in CAI.
3. Review each course yearly to make sure content is current and relevant.
4. Compare content to courses provided by CAI National to make sure content and terminology is consistent.
5. Promote the webinar version of DCAL courses to help even more people build better communities.
6. Develop additional Advanced DCAL courses to continue to engage existing DCAL participants and provide them with more options for continuing their education.
7. Create shorter recorded segments of the DCAL course material, similar to "Ted Talks" to reach younger board members and those who want information in more of a "hot topic" format.

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

The DCAL program is valuable to the chapter in several ways:

1. It educates our Homeowner Leaders, empowers them to make informed decisions, and in turn gives them the knowledge they need to build better communities. Knowledgeable members enhance the chapter overall.
2. This one-of-a-kind offering in IL elevates CAI as a premier organization who helps homeowners learn and advocate for themselves and their communities.
3. This robust education series has helped the chapter increase membership. As people experience the education CAI offers, they realize the benefits of being a CAI member.
4. The connections and involvement by DCAL members has enhanced the chapter by providing more homeowner perspective on committees, and on the Board of Directors. This perspective keeps CAI-IL strategic goals balanced and in perspective for all membership groups.

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