

Application: 049

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**Page: Entry Information**

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**Chapter**

Pennsylvania & Delaware Valley Chapter Community Associations Institute

**Chapter Size**

Very Large (over 750)

**Category**

Chapter Management and Development

**Goals and Objectives: 30 Points**

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

The goals of our new Education Catalog were twofold:

1. Provide a comprehensive overview of chapter continuing education programs, speakers and topics for members generally, and managers specifically, so they could plan out their educational activities for the year.
2. Provide a new advertising mechanism for business partner members that would result in a profit to the chapter.

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

Goal 1:

Typically, our educational programs, totaling 30-35 programs each year, were announced several weeks or a month in advance, via US mail, email, social media promotions, etc. Members would often ask what topics/programs were coming up in the months ahead, and there was no one-stop-shop where we could direct them for a comprehensive preview of upcoming educational programs. To solve this, we planned an educational catalog to be printed twice a year - a Winter/Spring issue covering programs from January to June, and a Summer/Fall issue covering programs from July to December. The catalog would be printed and shipped to all manager members with the January/February issue of our chapter magazine, thus keeping postage costs to a minimum. The implementation of the catalog, and its early deadlines, also enabled us to force our educational committees to complete their topic/speaker selection several months before the printing deadline. The printing deadline helped us keep our committees disciplined in their work of choosing topics and speakers, which in the past had many times been left to last minute.

Goal 2: Our chapter strategic plan called for an increase in revenue to fund several projects. The educational catalog was planned to be a profitable exercise by offering limited ad space to business partners. Advertising was marketed via our chapter sponsor plan. Revenue/expense goals are listed below:

Ad Revenue 2018: 2019

Budget \$4700 \$5100

Actual \$3600 \$5200

Printing Expense 2018 2019

Budget \$2500 \$2600

Actual \$2350 TBD / not to exceed \$2600

Catalog Profit 2018 2019

Budget \$2200 \$2500

Actual \$1250 \$2600 projected

The catalog paid for itself in year one and created a profit of \$1,250. In year two, advertising sold out and the expected profit is \$2,600. We met both goals in year one of the project and it continues to be a profitable program for the chapter.

## **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 budget for the catalog was driven by the estimated printing costs. We considered printing the catalog in house or making the catalog a digital only publication in order to save money. However, we determined that the professional nature of the publication was too important to our organization and we opted for a full color, professionally printed publication so that members would read it, advertisers would value it, and the value to our chapter would be maximized.

Once we had an estimate from the printer that also prints our chapter magazine, we designed an advertising package that both limited the number of catalog ads so as to not detract from the catalog content, and generated enough revenue to not only pay for the catalog but to generate a profit for the chapter, which it did. Ad rates were set by comparing ad rates and sizes to our chapter magazine as well as considering the amount of profit we hoped to generate in order to help fund the necessary growth in the chapter budget to fund various strategic planning objectives.

### **What marketing techniques were used? (10pts)**

The only marketing related to the catalog was to market the advertising opportunity to business partners. This was accomplished primarily via our annual chapter sponsor plan, which resulted in most ad sales. The sponsor plan was marketed primarily via email to all business partners, with specific outreach targeted to previous sponsors who advertised in other publications including our chapter magazine and annual member directory.

### **Who was your target audience? (10pts)**

Our target audience for the catalog was managers, primarily. The secondary audience was business partners interested in advertising to managers. Because we also made the education catalog into a digital publication available on our website, we were able to market the catalog and the education programs contained within it to homeowner members.

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

The deadlines for the two catalogs were made to coincide with the printing deadline for the chapter magazines which the catalog would be packaged with for shipping purposes. Once the chapter board approved the project in the Summer of 2017 as part of our budget process, the deadlines were established and the advertising opportunities were incorporated into the chapter's annual sponsor plan which was released in late September, 2017. We decided to only make full page ads available in the catalog to aid in quickly selling out the ad space and to maximize revenue. Selling the ads was the easy part of the project, although in year one we did not sell all available ads. In the second year of the catalog (2019) we were able to sell out advertising since members were now familiar with the catalog.

As we began planning for the catalog in the Summer of 2017, we notified our education committees of the hard deadlines for choosing session topics and speakers for 2018 and we enforced these deadlines because the catalog had to go to the printer on a date certain, and had to be complete. We incorporated the deadlines into our annual Call for Presentations and shared the topics submitted via the Call for Presentations in September, 2017 with instructions to committees that topics and speakers for the first half of 2018 were due in early November, to give us plenty of lead time in preparing the content for the Winter/Spring education catalog. An indirect benefit of these advanced deadlines was the fact that we could post educational events to our website and open registration significantly earlier than we typically had done in previous years, because once the education catalogs arrived in managers mailboxes in early January, we wanted members to have the ability to register for any program contained in the catalog. A similar process was used for the Summer/Fall education catalog.

## 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 success of the goal of creating a profitable financial initiative for the chapter was easy to determine...the catalog generated a profit in 2018, and we anticipate doubling that profit in 2019.

The other goal of creating a comprehensive listing of all chapter continuing education programs was also achieved. Every manager member received a printed copy of the catalog and all members were encouraged to view the digital version. In addition, while reducing the overall number of programs from 2017 to 2018 slightly, attendance was up across most programs, in some cases significantly, and our attendance revenue for 2018 grew by \$4,000 over the previous year. We believe the implementation of the education catalog played a part in these increases.

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

As noted above, we judged the success of this program by the ability to generate a profit (\$1250 in year 1/2018; anticipated \$2500 in year 2/2019).

In addition, the increase we saw in attendance and attendee revenue at most chapter education programs in 2018 correlates to the additional promotion that our educational programs received from the publication of two educational catalogs throughout 2018 and delivered directly to the manager members.

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

The implementation of an education catalog has forced the chapter staff and volunteers to adhere to a very strict timeline for the selection of session topics and speakers in order to meet printing deadlines for the catalogs. This was supposed to help us be better organized but an indirect, un-anticipated result has been pressure on chapter staff to step up if and when a chapter committee does not follow through with their work to select session topics and speakers. This has become a significant task to manage and we are considering ways to better manage this in the future. In addition, we anticipate that in future years, the popularity of the catalog will grow and we will be able to generate additional revenue to benefit the chapter.

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

The overall value to the chapter was realized in the following ways:

Increased revenue/profit to fund strategic goals.

Increased marketing of chapter educational programs, resulting in growth in attendance and attendee revenue.

A more organized and concerted effort to prepare for and plan in advance for all chapter continuing education programs for the year.

We are very proud of the professional nature of the printed catalog and the increased value we believe it brings to all members and to our chapter.

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