

Application: 050

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Chapter

San Antonio

Chapter Size

Medium (251-500)

Category

Chapter Management and Development

Goals and Objectives: 30 Points

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

The main goal for our chapter management and development in 2018 was a chapter strategic plan overhaul. For many years the chapter had been primarily reactive with respect to concerns expressed by members, events were planned with a culture of "that's how we've always done it," and the old guard was exhausted and needed better support. The board's response to these concerns was triage. An action was needed immediately and decisively to help the members feel confident with the future direction of the chapter. Fresh faces with new energy were required to allow the senior leaders the opportunity to take a breath and get revitalized. The one-year strategic goals were to grow from a small to a medium chapter, better utilize social media, obtain at least 100 attendees to our board leadership and development workshops, and provide better chapter support financially to Texas Community Associations Advocates (TCAA).

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

The primary strategy used was a heavy dose of recruiting newer members who had strong leadership skills and a desire to serve the chapter. The goal was not to replace and forget our founding and long-serving members, it was to honor them and keep pushing the chapter in the direction that was created from their vision. In 2018 the chapter was able to recruit five (5) new board members and six (6) new committee chairs, none of which has previously served on any CAI board or as a CAI committee chair and spanned 40 years in age with diverse and varied professional experiences. With the new mass push for fresh volunteerism and strong corporate memory from our leaders who needed a break, the chapter strategic plan overhaul was born.

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 beautiful part of this plan, zero chapter funds were required. With 11 new eager and willing volunteers, there were no cost implications to the chapter other than basic administrative costs such as name tags and new board binders. However, these costs would have been burdened irrespective of who the volunteer was. A great zero cost plan which was implemented!

What marketing techniques were used? (10pts)

The marketing technique that was used for the plan was guerilla marketing, however minus the aggressive tactics. The goal was to keep costs low and capitalize on "event ambushing." At normally scheduled luncheons, new member events, and our "speed networking" program the board president used part of the presentation time to "challenge" members who had not volunteered yet and made impassioned pleas. The messages conveyed at the events were focused on attending every educational opportunity provided by the chapter, volunteer as much as humanly possible, and to "BUY CAI!" Throughout the year the volunteerism rate grew, including a record number of board member nominations for the annual meeting with eight (8) nominees for three (3) openings.

Who was your target audience? (10pts)

Our target audience was obviously our existing CAVL's, Business Partners, and Managers. However, the supplemental target was the group of San Antonians we knew were out there but weren't aware of our amazing organization. As momentum was gained, our members became more excited and this generated more interest in the form of new members to the chapter. A growth of 36% was experienced in 2018, a record year for the chapter and an amazing effort by our co-chaired membership committee.

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

The program was implemented immediately after the strategic planning session. The deadlines for the recruitment of new volunteers for our committees was instantaneous since we had multiple memberships and flagship events coming up quickly, i.e. CA day, new member appreciation lunches, speed networking event, the launch of social media platforms, legislative action committee (due to a legislative session year), and the awards gala. Unfortunately, we didn't have written deadlines, only a sense of urgency. The six new committee chairs were appointed within a month. The implementation of these fresh and vibrant leaders was voted and approved unanimously by the board of directors at the next scheduled board meeting. The primary driver behind the implementation process was the board adopting an electronic voting mechanism with decisions being ratified at the next scheduled board meeting, this procedure eliminated weeks, if not months, of downtime allowing our committee leaders to feel empowered to surge forward with their innovative ideas. Responsibilities of overseeing these goals were shared by the board as a whole, every month all directors engaged in a discussion on the success and status of all projects. The board was very strong with their trust and faith in their appointed committee leaders, multiple discussions throughout the year were about allowing the committees to think big and support their interpretation of the board's goals. Autonomy and unwavering support was the theme in 2018 of empowering the volunteers.

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 the success of the program we used metrics against the goals, i.e. new members joined, did we officially change our chapter size (and retain it), an increase of users of social media, attendees at our educational offerings, and increased support of TCAA.

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

The biggest metric was our increase of members, in 2018 we were able to grow the chapter by 36% and this significant growth secured us our medium chapter status we were looking for. Our social media campaign started with zero platforms and zero followers. By the end of 2018, we had three platforms and 219 followers. In 2018 we achieved our goal of 100+ attendees at our board leadership and development workshops with a total of 107. Lastly, in 2017 during our last legislative session, the chapter committed \$2,000.00 to TCAA. Based on the board's 2018 vote and budgeting, the 2019 legislative session will have \$3,500.00 being donated to TCAA on behalf of the chapter.

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

Our strategic plan and goals can be improved in the future by the board making a commitment to sitting down every year in a meeting specifically designed to talk chapter strategy. 2018 proved that with a team approach and a willingness to bring on fresh faces there is plenty of stamina in the chapter for double, if not triple, the success of what was accomplished in 2018. San Antonio is the seventh largest city in America; there are still plenty of CAVL's, Business Partners, and Managers we still haven't "touched." If we continue to be deliberate and intentional with our goals the chapter should have continued success.

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

If we discuss only financial value, at year end 2018, chapter total income was 113.87% (surplus income in membership, sponsorships, awards gala sponsorships, CA day, membership events, and interest income). However, the true value brought to the chapter was our 36% increase in new members which will now help in increased volunteerism, increased awareness of our brand in San Antonio, and increased numbers of owners we are serving in our communities with augmented educational awareness and representation at the legislative sessions.

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