

Application: 060

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Page: Entry Information

Submitted By

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Chapter

Southern Arizona Chapter of CAI

Chapter Size

Small (0-250)

Category

Chapter Management and Development

Goals and Objectives: 30 Points

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

The 2018 Board of Directors implemented an effective chapter strategic plan by selecting one overall annual goal (growth) and then broke it out by the chapter's committees. The overall goal was a 5% increase in all aspects of the chapter including communications, membership, sponsorship, program attendance, LAC support and charity participation. Some specific goals the Board hoped to reach by the overall growth included:

- Create opportunities for professional interaction between all member types.
- Increase attendance/participation at luncheons and Expo.
- Provide educational and relevant programs for members and guests.
- Encourage communication and networking between members in person and on social media platforms.

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

The Board of Directors and association staff used the following strategies to help attain both our specific committee goals and over chapter growth goal:

- Personal outreach to members to encourage participation at events and fundraising.
- Surveyed attendees throughout the year to find out the topics they were most interested in learning about and what would bring them back to a future chapter event to increase attendance.
- Increased electronic communications on upcoming events, sponsorships, luncheons, etc.
- Provided a monthly update of the strategic goals and progress at all meetings so our membership could see our progress in growth and what was still needed to achieve each goal.
- Strengthened committees by requiring regular committee meetings so committees could assist in reaching the Board's goals.
- The chapter held it's first LAC fundraising event to raise additional funds for our state LAC.

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)

Our 2018 goals did not necessarily require additional funds to our annual budget, however if our goals were reached in 2018, it would allow the chapter additional funding and end our year in a well off financial state. Some examples of this additional revenue to our budget included:

- The increase in 12 members brought in additional rebate funds to our chapter.
- The increase 113 registrations overall in the 2018 year also brought in additional revenue compared to the previous year.

What marketing techniques were used? (10pts)

Marketing techniques included the following examples:

- We began posting to Facebook at least once a week (if not more) by our Chapter Administrator, Board of Directors and committee members. Social media posts included upcoming chapter events and happenings, along with posts provided by the CAI Gaggle account.
- For our lunch meetings, we set a standard plan to send out a minimum of 4 eblasts prior to the event. Our website platform allows us to email just non-registered attendees, so we could target the correct recipients of those eblasts.
- For our larger events, such as the LAC Golf Tournament, Family Fun Event and Expo we began promoting the events and opportunities months in advance. This was also the case for annual sponsorships.
- Our Chapter newsletters are sent out 5 times per year (January, April, June, August and November) and include promotions and save the dates for any upcoming meetings or events.

Who was your target audience? (10pts)

Our target audience overall included both members and non-members. We targeted our current membership to become more involved by following us on Facebook, recruiting members, attending more events and giving back to the LAC and charity. We targeted non-members in two ways:

1. The first included those who had signed up for our mailing list or attended a past event. We targeted these non-members to attend our events through eblast.
2. We targeted non-members in areas outside of our major city and instead in smaller surrounding areas to encourage membership. We found these contacts through an online database for corporation filings.

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

The deadline for the overall growth goal, along with specific committee goals were to be met by the end of the year. Each committee was assigned to help with their specific goal. The Board's responsibility was to help overall and provide updates to membership. The association's staff were responsible in tracking the goals and providing support to the Board of Directors. This was implemented by providing monthly updates to both membership and the Board of Directors. The Board of Directors reviewed the strategic goals at each monthly Board meeting, then reported this information to membership whenever a program was held. This information was provided on a looping slideshow that was played before lunch event and then announced at the start of the meeting.

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 of Directors and staff created a "goals tracking" spreadsheet that listed each goal and had a correlating formula to track the progress of reaching the 5% increase. The spreadsheet was updated monthly to see the current status of our success in reaching our goals.

This document was reviewed at Board meetings and then placed into a PowerPoint to share with membership at monthly lunch meetings.

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

Each committee category had a 5% increase goal:

- Communications: post 5 statuses per quarter
- Membership: increase membership by 5% overall (12 new members)
- Sponsorship: increase annual sponsorship revenue by 5% overall (\$29,750)
- Programs: increase overall attendance by 5% (have a total of 536 registrations)
- LAC: increase donations by 5% (\$7,058.10)
- Charity: increase donations by 5% (\$682.50)

The 'goals tracking' spreadsheet allowed us to what percentage we were at to reaching the goal.

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

Our goal to increase in growth was more achievable in some categories vs. others. We reached our goals in communications, membership, programs and the LAC, however fell short in sponsorship and charity.

Because we exceeded many of our goals, the Board of Directors decided that we could raise the bar and set higher goals for the upcoming year. The Board and staff believe diversifying our goals specific to each committee would be more beneficial in the future vs. having one overall goal such as growth.

The Board will continue to review strategic goals at every Board meeting in the 2019 year.

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

Because we were able to increase overall, it was a huge member benefit. The increase in communications allowed members and non-members to actively know what is going on in the chapter. The increase in membership gave everyone more opportunity networking between the different member types. The growth in attendance at programs meant more connections could be made and would ultimately bring in more Business Partners with more Managers in attendance. The increase in sponsorship allowed us to have better programming such as paid speakers and an improved venue. The increase in the LAC showed we are active in our state committee and allowed us to have more of a voice for Southern Arizona. The growth in charity helped spread our association's name in the community and increased our presence.

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