

Application: 078

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Started at: 2/9/2019 11:04 AM - Finalized at: 2/15/2019 03:51 PM

Page: Entry Information

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Chapter

WMCCAI

Chapter Size

Very Large (over 750)

Category

Leadership

Goals and Objectives: 30 Points

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

Each year, after the chapter leaders election, the Executive Director holds a training/orientation session for all incoming Board Directors, Council Chairs and Committee Chairs.

In the past, the session was focused on general administrative items such as meeting schedules, overview of the budget and served as a meet and greet among the new leaders.

While those things are important, the 2018 Chapter President and Executive Director felt a more strategic orientation was needed. The goal was to increase the leaders understanding of the roles of the varying leadership vs staff, provide detailed budget information, and to give a detailed explanation of how connected each committee was to the strategic plan and each other.

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

Strategies to reach these goals were to revamp the presentation by pulling data from industry organizations specializing in association governance, streamline the script to follow the new slides and to personalize the information to WMCCAI, and communicating the importance of this training to both the newly elected and veteran leaders.

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 Leadership Orientation is minimal but allows for the chapter to host lunch for the attendees. The lunch provides great networking time for all the chapter leaders. There are no additional expenses for the session as it is held at the chapter office and the Executive Director and Board President lead the session.

What marketing techniques were used? (10pts)

As soon as the leadership election is confirmed and announced, a detailed Congratulations and Welcome Email is sent to the new Board and Chairs. That email includes the session information for the training and a registration link.

Who was your target audience? (10pts)

The audience is the incoming Board Directors, Council Chairs and Committee Chairs, both newly elected and returning leaders.

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

The session is held before the first meeting of the newly elected Board at the chapter office. The planning of the session falls to the Executive Director and the Board President, who also gets guidance from the Immediate Past President. The chapter staff coordinates the room set up, registration, catering and audiovisual needs.

The attendees of the session are asked to submit any specific questions they have prior to the session. This allows the Executive Director to ensure these items are addressed.

Each chapter leader is given a USB drive with all the important chapter documents and information; the same information discussed at the orientation session. The USB drive includes chapter bylaws, chapter policies, a copy of the orientation presentation, chapter leadership roster with contact information, staff directory with roles listed, a calendar of chapter events for the year, and the annual chapter budget.

We also created a web page on the chapter site for the Board Directors; it includes all the items listed above as well as the monthly Board Book. One stop shopping and an easy delivery system.

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, the Executive Director spoke with chapter leaders after the session to get feedback. Success is also evident as leaders have a better understanding of chapter strategic planning vs operational activities and when they work together, across committees, to accomplish goals.

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

In this training, a detailed conversation about the chapter budget takes a large amount of time. Slides within the presentation clearly show the top revenue producing departments within the chapter. The discussion of the sessions takes the leaders through an analysis of how each committee or event's budget supports itself as well as operational costs of the chapter. This conversation with the leaders has been a great success as they have a better, deeper understanding of why budgets are set as they are, where the expense money comes from and the interdependence of all budgets to achieve their foretasted net. Already, we are seeing more cross-committee projects, more participation in sponsorship sales and marketing, and leaders stepping up to ensure that the committee members see their role in achieving the strategic goals of the chapter.

Teaching the leaders about Policy Governance and the separation of roles between strategic planning and operations has allowed the Board and staff to operate more efficiently, pushing forward on programs in the office while the Board handles the longer term strategy of the chapter.

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

Each year, this program will be reviewed and updated to reflect the chapter's goals, financial position, and the incoming Board President's agenda. A webinar style version of the presentation may be developed to allow leaders who cannot attend the in-person session to hear the detailed presentation from the Executive Director.

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

The overall value to the chapter is more efficient leadership when developing strategic goals and plans for the chapter; a leadership that understands the importance of meeting all revenue goals in the budget so that other programs can be funded even if they are not specifically in their council; and a more streamlined operational working relationship between staff, committees and the Board.

An invested and educated leadership makes WMCCAI operate efficiently and allows us to focus on member service and continuing our growth.

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Would you like to upload additional documents?

Thank you for your submission! We encourage you to submit another program in a different category.