

Page: Entry Information
Chapter CAI Texas
Chapter Size Very Large (761-1200)
Category Leadership
Program Name 2nd Annual Strategic Planning & Governance Retreat
If this was a joint program with another chapter, please list the chapter. Austin, Dallas, Houston, San Antonio
Each question is worth 20 points and will be scored using the following rubric: (1-5) Poor Didn't effectively answer the question (6-1) Fair Answered the question (11-15) Good Answered the question with more detail (16-20) Excellent Went above and beyond with proven results and visible data
Describe the program and why it fits the category. (20pts) <p>In October 2025, leadership from the four CAI Texas Chapters convened for their second annual Strategic Planning & Governance Retreat at Horseshoe Bay Resort in Horseshoe Bay, Texas. This professionally facilitated, two-day retreat focused on refining a three-year strategic plan built around five priority focus areas established the previous year.</p> <p>The purpose of the retreat was to create operational alignment and statewide consistency in governance, programming, advocacy, and financial sustainability. Through structured planning sessions, team-building exercises, and collaborative workshops, chapter leaders evaluated performance metrics, established measurable objectives, and identified shared benchmarks to ensure an equitable and high-quality member experience across all Texas markets.</p> <p>As a result, the chapters strengthened inter-chapter collaboration, formalized shared strategic priorities, and reinforced a unified commitment to advancing CAI's mission in Texas. The retreat solidified a coordinated leadership approach that promotes consistency, equal representation, and long-term sustainability—ensuring that CAI members statewide benefit from aligned, mission-driven governance and strategic execution.</p>
How did this program meet the mission and vision of the chapter and CAI as a whole including fostering an inclusive environment that reflects and serves our diverse community? (20pts) <p>The second annual Strategic Planning and Governance Retreat advanced the Chapter and CAI mission by creating measurable structure, consistency, and equitable access to engagement opportunities statewide.</p> <p>The development of a formal member journey map established defined touchpoints from new member onboarding through committee leadership and board service — creating a clear, standardized pathway for 100% of members to engage regardless of tenure or professional role.</p> <p>A comprehensive review and alignment of committee charters with bylaws ensured governance consistency across all committees, reducing ambiguity and creating uniform operational standards statewide. This guarantees that members in every market experience the same expectations, leadership structure, and opportunities.</p> <p>Additionally, the creation of a centralized statewide resource-sharing plan for presentations, speakers, and program materials increases efficiency, reduces duplication of effort, and expands access to high-quality education across all chapters — ensuring equal programming standards regardless of chapter size or budget.</p> <p>Collectively, these initiatives strengthened governance alignment, improved operational consistency, expanded access to resources, and created a scalable, inclusive framework that serves new members and veteran leaders alike — directly supporting CAI's mission to provide education, establish standards, and advance the community association profession.</p>
What was the impact on the chapter and its members after completing the program? (Growth of membership, financially, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20 pts) <p>Social media posts highlighting the initiative generated thousands of impressions, reinforcing transparency and leadership accountability. In response, the Chapters received dozens of direct emails from members expressing appreciation for the unified commitment to strengthening CAI across Texas. Interest in volunteer leadership increased significantly, with multiple members proactively requesting information on how to serve on committees and advance to Board positions — elevating the perceived value and responsibility of Board service.</p> <p>Operational alignment improved through increased inter-chapter communication. President-Elects now meet quarterly, creating a structured leadership pipeline and ensuring consistency in governance, programming, and strategic priorities statewide.</p> <p>All four Chapters are now formally highlighted during new member orientation presentations, reinforcing that CAI operates as a connected statewide network. This has strengthened cross-market awareness and positioned CAI Texas as a unified professional community rather than four independent entities.</p>

Provide quantifiable data supporting the rationale for success. Include why this data is significant. (20pts)

The retreat achieved a 97% Board participation rate, demonstrating near-unanimous leadership commitment across all four Chapters. Board members dedicated 2.5 full days onsite, followed by continued post-retreat collaboration and communication with fellow board leaders statewide. Staff invested 150+ hours in preparation, coordination, and follow-through — reflecting a significant operational commitment to long-term governance excellence.

What are your plans to maintain the momentum of this program moving forward? (20 pts)

All four Chapters have formally added the retreat as a dedicated budget line item, institutionalizing the program for future Boards. Additionally, the retreat will rotate throughout the state, ensuring each Chapter has the opportunity to host in its region and selecting locations that promote geographic equity and convenient travel access for all participants.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

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