

Position and Candidate Specification



Community Associations Institute

Chief Executive Officer

PREPARED BY:

Leslie Hortum

Ellen E. Pennow

Katherine Stellato

March 2025

Assignment: 66429-001

CAI is an international membership organization dedicated to building better communities. With over 50,000 members, CAI has 64 chapters worldwide, including Canada, the Middle East, and South Africa, and relationships with housing leaders in a number of other countries, including Australia and the United Kingdom. CAI provides information, education and resources to the homeowner volunteers who govern communities and the professionals who support them. CAI members include association board members and other homeowner leaders, community managers, association management firms, and other professionals who provide products and services to community associations.

CAI serves community associations and homeowners by:

- Advancing excellence through seminars, workshops, conferences, and education programs, most of which lead to professional designations for community managers and other industry professionals.
- Publishing the largest collection of resources available on community association management and governance, including website content, books, guides, Common Ground magazine, and specialized newsletters.
- Advocating on behalf of common interest communities and industry professionals before legislatures, regulatory bodies, and the courts.
- Conducting research and serving as an international clearinghouse for information, innovations, and best practices in community association development, governance, and management.

We believe common interest communities should strive to exceed the expectations of their residents. We work toward this goal by identifying and meeting the evolving needs of the professionals and volunteers who serve associations, by being a trusted forum for the collaborative exchange of knowledge and information, and by helping our members learn, achieve, and excel. Our mission is to inspire professionalism, effective leadership, and responsible citizenship — ideals reflected in communities that are a preferred place to call home.

CAI is governed by a 15-member Board of Trustees using the Policy Governance model*. Several Committees work diligently in supporting the policy making and financial oversight of the organization. Additionally, the Board is supported by three Membership Representation Groups, elected members who give their constituencies a voice to ensure that CAI continues to provide services and benefits those members need and value:

- Business Partners Council — Twelve members represent business partner members.
- Community Association Managers Council — Twelve members represent management company CEOs and all other community association manager members.
- Homeowner Leaders Council — Six members represent homeowner leader members.

These councils recognize the unique characteristics and needs of each of the CAI member classes, give them a stronger voice in crafting policy, and provide a vehicle for making recommendations on CAI services and benefits.

CAI has an annual budget of \$19 million and 63 FTEs. It is headquartered in Falls Church, VA. For more information, visit: <https://www.caionline.org/>.

* The Policy Governance Model, also known as the Carver Model, is a framework for board leadership that empowers boards to fulfil their accountability obligations by focusing on organizational purpose (ends) and delegating responsibility for implementation (means) to management.

The Chief Executive Officer (CEO) of Community Associations Institute (CAI) provides visionary leadership and strategic direction to drive the organization's mission to advance excellence in community association living. Reporting to the CAI Board of Trustees, the CEO oversees all aspects of organizational management, including strategic planning, financial management, stakeholder engagement and operational excellence. The CEO is responsible for the recruitment, retention and motivation of a talented, long-serving staff and supporting an inclusive, member-centric culture.

KEY RELATIONSHIPS

Reports to CAI Board of Trustees

Direct reports Chief Financial Officer
Chief Strategy Officer
Executive Director, Community Association Managers International Certification Board
Senior Vice President, Membership & Chapter Relations
Senior Director, Executive & Board Relations

Other key relationships Current and prospective members of CAI
Chapter staff and volunteer leadership
Other related associations and nonprofit organizations
Relevant legislative and regulatory bodies at the state and federal level

DESIRED OUTCOMES

- An inclusive strategic planning exercise resulting in a clearly defined vision and goals for the future.
- Continued financial strength and sustainability, with a focused approach on growing revenue.
- Clearer communication and understanding of CAI's core values and value proposition to its members.
- Strong member retention with steady membership growth and development of next generation leaders.
- New programs, products and services, further distinguishing CAI and meeting evolving member needs.
- A healthy, inclusive, member-focused organizational culture, enabling the organization to attract and retain a high-performing team.
- Continued growth of CAI's reputation as a leader and resource within the industry, positioning it as a trusted source for federal legislators and regulators, the media, related nonprofit organizations, and current and prospective members.
- Enhanced influence in the policy arena, ensuring CAI remains a respected voice in state and federal legislative contexts.

CAI seeks a dynamic and visionary leader who will work with the Board to steer the organization towards future growth and increased impact. The ideal candidate will possess exceptional strategic planning abilities, strong interpersonal skills, and a proven record of successful leadership within a membership-driven organization. Working collaboratively with CAI's Board of Trustees, the CEO will be entrusted with overseeing all aspects of the association's operations, driving growth and innovation, and fostering a collaborative and inclusive environment for its members and stakeholders.

IDEAL EXPERIENCE

Senior executive leadership experience

Has held direct accountability for driving the success and financial sustainability of an organization of comparable scale, scope and complexity; leadership experience in a membership organization context is preferred.

Experience driving growth and impact

Has developed and implemented innovative initiatives resulting in increased revenue and member value.

Experience serving as the face and voice of an organization

A strong communicator with the ability to articulate a compelling vision and engage diverse stakeholders, including relevant policymakers, members and regulatory bodies.

Industry knowledge

Knowledge of the industry is a plus; at minimum, a proven ability to quickly learn a new industry and issue set.

CRITICAL LEADERSHIP CAPABILITIES

Acting Strategically

- Works closely with the Board of Trustees to develop and implement a forward-looking strategic vision and plan, driving CAI's growth and continued relevance.
- Proactively addresses upcoming changes within the industry, ensuring CAI keeps pace and is not operating from a reactive posture.
- Considers long-term implications and anticipates future challenges and opportunities for the organization.
- Effectively tells the story of the community associations industry and advocates on behalf of CAI's membership groups.

Driving Results

- Drives organizational development and streamlines processes to improve efficiency and organizational capacity.
- Responds to member needs with evolved educational offerings and relevant additions to the portfolio.
- Works effectively with chapter leadership to enhance cooperation and alignment.
- Supports and grows CAI's influence and visibility in policy and regulatory settings.

Leading People

- Inspires a high-performing and collegial staff and drives effective execution against CAI's short-and long-term goals.
- Models and supports a strong, member-focused, and collaborative culture throughout the organization.
- Maintains adaptability and resilience in the face of industry changes and uncertainties.
- Employs a servant leader approach in engaging members, volunteer leaders, and other key constituents, actively listening to understand and address unique interests and concerns.
- Invites the team to recommend ways to solve problems, discuss challenging issues, or generate new ideas.

OTHER PERSONAL CHARACTERISTICS

- Diplomatic and politically adept
- Open-minded and flexible
- Consensus builder
- Transparent communication style

THE SEARCH PROCESS

CAI has retained Spencer Stuart and welcomes nominations or expressions of interest. If you wish to submit your application materials (resume and optional cover letter) or nominate someone to serve as the next Chief Executive Officer, please send an email message with supporting materials to: CAICEO@spencerstuart.com. For best consideration, applications should be submitted by April 4, 2025. The appointment of the next CEO is expected in Summer 2025.