

Page: Entry Information

Chapter

ILNS

Chapter Size

Extra Large (1201+)

Category

Chapter Operations and Sustainability

Program Name

Strategic Hiring & Training

If this was a joint program with another chapter, please list the chapter.

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)

At CAI-Illinois, we identified the need for a dedicated bookkeeper/accounting assistant to strengthen our financial operations. However, we also knew that hiring and training for this specialized role could strain the chapter budget and create operational risk during onboarding.

Rather than approaching this as a simple hire, we treated it as an opportunity to strengthen internal operations and long-term sustainability.

Our goals were to:

1. Bring on qualified accounting support without creating unnecessary financial strain.
2. Implement structured training that protected the integrity of chapter financial records.
3. Build cross-functional knowledge within staff to reduce operational silos.
4. Create a sustainable staffing model with clear advancement and retention pathways.

We partnered with the North Suburban Cook County American Job Center through their federally funded On-the-Job Training (OJT) program. This program reimbursed a significant portion of payroll costs during the training period, allowing us to build capacity while maintaining fiscal responsibility. (See File 1)

To ensure strong operational controls, we developed a structured 30-day training plan, including a "sandbox" accounting environment. This allowed the new bookkeeper to practice posting transactions, issuing invoices, and reconciling accounts without impacting live financial records. This reduced risk while maintaining accuracy and transparency. (See File 2)

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)

Vision of CAI-IL:

CAI-IL is the premier organization inspiring community association excellence through best business practices, professionalism, effective leadership, and responsible citizenship by connecting homeowners, community managers, and business partners.

Strong chapter operations are the foundation of delivering on that vision.

By building a structured accounting training plan, putting financial safeguards in place, and making sure our systems like QuickBooks and GrowthZone were integrated properly, we strengthened our internal controls and improved the accuracy and transparency of our financial reporting. That matters because our members trust us to manage chapter funds responsibly, and strong systems help us do exactly that.

Partnering with the American Job Center wasn't just about offsetting payroll costs. It allowed us to bring someone into the organization, train them the right way, and provide a real career path while strengthening our financial operations at the same time.

At the end of the day, when a chapter's operations are solid behind the scenes, everything else runs better — programs, member services, events, and long-term planning. This initiative helped us build that stronger foundation.

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)

This approach strengthened both financial sustainability and internal efficiency.

Cost Savings Without Compromising Quality--Through the OJT reimbursement program, we reduced hiring costs while maintaining high accounting standards.

Stronger Financial Controls--The sandbox accounting model ensured that training did not compromise real-time financial records. This reduced onboarding risk and preserved reporting accuracy.

Improved System Efficiency--QuickBooks training and GrowthZone import training enhanced financial reporting accuracy and streamlined repetitive data entry processes during our AMS transition. This reduced manual work and improved efficiency.

Cross-Department Knowledge Sharing--The bookkeeper met individually with each staff member to understand how their work impacts accounting. The advanced portion of training included more than 10 hours of teach-back sessions, strengthening internal collaboration and operational transparency. (See File 2 and File 3)

Resource Reallocation--Savings generated from the OJT program allowed us to redirect nearly \$10,000 toward education and membership initiatives without increasing dues or reducing services.

This initiative strengthened chapter operations, improved financial stability, and enhanced internal collaboration.

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

The results demonstrate measurable operational improvement and sustainability.

Financial Savings

• \$9,915 reimbursed (approximately 75% of payroll costs) during the first 90 days. (See File 4). This significantly reduced onboarding costs and allowed funds to be reallocated to member-facing programs.

Structured Training Implementation

- 30-day and advanced training plan successfully completed.
- Over 10 hours of internal teach-back sessions conducted to strengthen staff-wide financial understanding.

Operational Capacity Building

- Implementation of QuickBooks training to improve financial reporting accuracy.
- GrowthZone import training to ensure accurate system migration and reduce repetitive data entry errors. (See File 5, File 6, File 7)

Long-Term Staffing Sustainability

- Defined advancement pathway for the bookkeeper position to grow into an Accounting Manager position. (See File 8)

These measurable outcomes demonstrate that this initiative was not simply a hiring decision—it was an operational improvement strategy that enhanced financial stewardship and long-term chapter sustainability.

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

This model has become part of our operational framework.

Moving forward, we will:

- Continue exploring workforce development partnerships to responsibly manage staffing costs.
- Maintain and refine the sandbox training model for future hires and future system implementations.
- Provide ongoing QuickBooks and GrowthZone training to ensure system accuracy as processes evolve.
- Use structured advancement pathways to improve retention and reduce turnover-related costs.
- Continue monitoring financial performance and training outcomes to identify further efficiencies.

By approaching staffing as an operational sustainability strategy rather than a simple expense, we strengthened internal financial controls, improved efficiency, reduced risk, and positioned CAI-IL for long-term operational stability.

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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