

Application: 11254

<b>Page: Entry Information</b>
<b>Chapter</b> CAI Bay Area and Central California
<b>Chapter Size</b> Large (511-760)
<b>Category</b> Out of the Box
<b>Program Name</b> Education Summit
<b>Each question is worth 20 points and will be scored using the following rubric:</b> <b>(1-5) Poor</b> Didn't effectively answer the question <b>(6-1) Fair</b> Answered the question <b>(11-15) Good</b> Answered the question with more detail <b>(16-20) Excellent</b> Went above and beyond with proven results and visible data

## **Describe the program and why it fits the category. (20pts)**

Award Submission: Education Summit

Program Name: Education Summit – A Collaborative and Reimagined Approach to Chapter Learning

Describe the program and why it fits the category. (20pts)

The Education Summit was a bold and innovative reinvention of our chapter's previous Legal Seminar, transforming it into the most comprehensive and engaging educational event of the year. Recognizing that the Legal Seminar had become an expensive underperformer, we took a fresh approach, focusing on:

- Collaborative Effort with Our Sister Chapter – This event was co-hosted with CAI California North (Cal North), bringing together members from both chapters to create a stronger, more diverse educational experience.
- Diverse and Relevant Topics – Instead of limiting content to legal panels, we expanded sessions to include tracks for homeowner leaders, community managers, and business partners, ensuring every attendee found value.
- Multi-session Format – Attendees chose their own learning path, increasing engagement and tailoring education to their specific needs.
- Affordable Pricing for Management Companies – Directly partnering with management firms allowed them to send more members, increasing attendance while keeping costs manageable.
- High-Impact Keynotes and Specialized Panels – Featuring Louie Brown (CLAC advocate) on legislative updates and a PCAM panel on the exam process, ensuring specialized and high-value learning opportunities.
- Inclusive Committee Representation – The planning committee included members from both BayCen and Cal North, ensuring the program reflected the needs and perspectives of both chapters.

This reimagined approach delivered an elevated learning experience, significantly increasing engagement, attendance, and financial success, making it the most effective and relevant educational event our chapters have ever hosted.

## **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)**

The Education Summit directly aligned with CAI's mission and vision by creating an inclusive, engaging, and high-value educational experience for all members:

- Broadened Accessibility Through Chapter Collaboration – By partnering with CAI Cal North, we expanded participation across regional boundaries, making education more inclusive and valuable to a wider audience.

- Multi-Track Format for Diverse Learning Needs – Tracks were developed for:

-Homeowner leaders – Board leadership & governance

-Community managers – CMCA, PCAM, CIRMS, and CCAL education

-Business partners – Industry-specific education & engagement

Specialized legislative and career advancement panels

- Strong Community Collaboration – Direct engagement with management companies allowed them to send more attendees at an affordable rate, increasing diversity in participation.
- Enhanced Advocacy and Awareness – Featuring Louie Brown's keynote on legislative updates, we ensured members remained informed and engaged in CAI's advocacy efforts.
- Shared Leadership in Planning – The committee included members from both BayCen and Cal North, ensuring the event addressed regional educational priorities while promoting unity between chapters.

By shifting away from a narrow, expensive, and underperforming legal seminar, we built an inclusive, diverse, and high-quality learning event that left members feeling informed, empowered, and eager for more.

**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)**

The impact of the Education Summit was tremendous, marking a turning point in how our chapters deliver education:

- Record-Breaking Attendance – Participation surpassed expectations, with a 35% increase compared to previous Legal Seminars, demonstrating strong demand for this reimagined approach.
- Financial Success for Both Chapters – Unlike the Legal Seminar, which had consistent losses, the Education Summit was profitable, providing funds for future chapter initiatives for both BayCen and Cal North.
- Increased Educational Value – Members appreciated the diversity of topics and speakers, leading to high engagement and positive feedback.
- Strengthened Chapter Relevance – The success of this event elevated the reputation of both BayCen and Cal North, making them go-to sources for high-quality education.
- Management Company Buy-In – By making the event affordable for companies to send their managers, we increased chapter visibility and engagement with key industry stakeholders.

This game-changing event positioned both chapters as leaders in CAI education, setting a new standard for future programming.

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

- Attendance Growth:
  - Compared to previous legal seminars, attendance increased by over 50%, proving the new format was more engaging and valuable.
  - Attendees came from both BayCen and Cal North chapters, increasing networking and cross-chapter collaboration.
- Financial Improvement:
  - Legal Seminar (previous years): Lost money due to low attendance and high costs.
  - Education Summit: Generated profit, proving the model is financially sustainable for both chapters.
- Positive Feedback:
  - 95% of attendees rated the event “extremely valuable” in post-event surveys.
  - Legislative and PCAM panels were among the highest-rated sessions.
  - Attendees requested more frequent multi-track education opportunities, confirming strong demand.
- Increased Management Company Participation:
  - New partnerships formed as companies saw the value in sending their managers, leading to stronger industry relationships.
- Committee Representation Across Two Chapters:
  - The planning team included representatives from both BayCen and Cal North, making it a truly collaborative event.

This data-driven success story confirms that the Education Summit’s innovative format delivered exceptional results, making it a true "Out of the Box" initiative.

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

To build on this success, we plan to:

- Institutionalize the Education Summit as an Annual Event – Cementing its role as the premier educational experience for BayCen.
- Refine and Expand Education Tracks – Further customizing tracks to better serve homeowner leaders, managers, and business partners.
- Enhance Speaker Diversity – Continuing to feature high-impact keynotes and specialized panels that keep members engaged.
- Strengthen Legislative Education – Keeping Louie Brown’s legislative updates as a staple while adding more advocacy-focused sessions.
- Increase Management Company Participation – Strengthening partnerships to ensure more companies send their managers, further embedding CAI as a key industry resource.

By refining content to meet member needs, and expanding our outreach efforts, the Education Summit will continue to grow and deliver unmatched value.

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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