

Application: 9812

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Started at: 1/12/2024 10:31 PM - Finalized at: 1/12/2024 11:15 PM

<b>Page: Entry Information</b>
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<b>Chapter</b> CAI Bay Area and Central California
<b>Chapter Size</b> Large (511-760)
<b>Category</b> Chapter Operations and Sustainability
<b>Program Name</b> Direct Hire Management
<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)**

I am writing to nominate The CAI Bay Area & Central Chapter for the Chapter Operations & Sustainability Award. This nomination is a testament to the exceptional chapter management and sustainability initiatives that have significantly strengthened the internal workings of the chapter.

In the year 2023, The CAI Bay Area & Central Chapter embarked on a transformative journey by transitioning from 3rd party management to direct hire management. This strategic pivot marked a pivotal moment for the chapter, as it aimed to provide a renewed concierge-style experience to its members. The significance of this decision cannot be overstated, as it required a comprehensive effort from the Board Members, who played a crucial role in training and developing the Executive Director to ensure the success of this transition.

The transition involved meticulous audits and analysis of administrative operations, leading to the establishment of robust HR procedures. This thorough examination of the chapter's internal workings showcased the dedication of The CAI Bay Area & Central Chapter towards enhancing its operational efficiency and sustainability. The Board Members' hands-on involvement in the training process exemplifies their commitment to the success of the chapter.

Undoubtedly, this transition stands out as one of the greatest achievements of The CAI Bay Area & Central Chapter. The impact of this change has been palpable, bringing a renewed sense of vigor and hope to the membership. The chapter has not only successfully navigated this transition but has also transformed its membership into a state of growth.

### **How did this program meet the mission and vision of the chapter and CAI as a whole? (20pts)**

The transition to direct hire management undertaken by The CAI Bay Area & Central Chapter in 2023 directly aligned with the chapter's mission and vision, as well as the broader goals of CAI. The chapter's mission statement, 'Building bridges among those who serve community associations,' was not merely a tagline but a guiding principle that shaped the decision to pivot towards a concierge-style management approach.

The concierge-style management of a direct hire system inherently promotes greater communication and inclusion. By allowing members to directly interact with and build a relationship of trust with the Executive Director, the chapter achieved a key aspect of its mission – building bridges. This approach fosters a sense of community and collaboration, bringing together the various stakeholders involved in community associations.

The dedication and overall care demonstrated by the Executive Director in a direct hire model further enhance the fulfillment of the mission and vision. Members are not just clients; they become integral parts of a community where their needs are understood, addressed, and prioritized. This personalized approach resonates with the commitment to 'Building bridges,' as it emphasizes the creation of meaningful connections within the association.

Moreover, the pivot to direct hire management contributes to CAI's overarching goals by setting an example of best practices in community association management. It showcases a commitment to innovation and adaptability, aligning with CAI's mission to inspire professionalism, effective leadership, and responsible citizenship.

**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 transition from 3rd party management to direct hire management on The CAI Bay Area & Central Chapter and its members has been nothing short of transformative. The decision to embrace a concierge-style management approach has reverberated across various aspects, leading to a host of positive outcomes.

**Membership Growth:** One of the most notable impacts has been the turnaround in membership. The renewed concierge-style management offered through direct hire has resonated well with members, creating a sense of value and community. As a result, the chapter has experienced a significant uptick in membership, reflecting the success of the strategic pivot.

**Membership Value:** Members now perceive increased value in their association with The CAI Bay Area & Central Chapter. The direct interaction with the Executive Director and the personalized services offered contribute to a sense of belonging and appreciation, enhancing the overall membership experience.

**Chapter Operations:** Internally, the transition prompted a comprehensive review of chapter operations. The audits and analyses conducted during the pivot not only facilitated a smooth transition but also identified opportunities for operational improvements. The implementation of HR procedures has added a layer of professionalism to chapter operations.

**Please provide quantifiable data supporting the rationale for success. (20pts)**

The success of the transition to direct hire management at The CAI Bay Area & Central Chapter is evident through quantifiable data that reflects positive outcomes across multiple key performance indicators:

**Membership Growth:** The chapter experienced a decline in membership, reaching a low point of 594 members. However, since the Executive Director took charge and initiated direct contact with members, the membership has rebounded, surpassing 620 members. This measurable increase demonstrates a significant reversal of the previous trend.

**Financial Stability:** The financial impact of the transition is substantial. The chapter's operations were consistently over budget in the past. Under the guidance of the new Executive Director, there is now a commitment to meeting or exceeding the budget. This shift in financial management is reflected in the regained stability of the chapter's finances.

**Member Satisfaction:** The absence of disgruntled emails from members is a clear indicator of improved member satisfaction. In the prior structure, multiple disgruntled emails were received weekly due to issues such as lack of availability, care, or communication. The reduction in such complaints underscores the positive impact of the new management approach on member experience.

**Vendor Feedback:** Positive feedback from chapter vendors working with the Executive Director is an additional quantitative measure of success. The collaborative and effective interactions with vendors indicate that the chapter's external partners are experiencing improved engagement and professionalism in their dealings with the chapter.

**Board Engagement and Organization:** The increased engagement and organization of the Board are reflected in the pride of ownership demonstrated by board members. The deep dive and analysis conducted during the transition period empowered the Board to take a more active role in chapter operations. This qualitative shift is also reflected in improved quantifiable outcomes.

**Operational Transparency:** The Executive Director's commitment to operational transparency is demonstrated through proactive communication with the Board and committees. The fact that financial viability is considered before making decisions, rather than blindly approving requests, is a measurable improvement in the decision-making process.

In summary, the quantifiable data supports the rationale for the success of the transition to direct hire management at The CAI Bay Area & Central Chapter. The positive trends in membership growth, financial stability, member satisfaction, vendor feedback, and board engagement collectively illustrate the effectiveness of the new management approach in achieving tangible and sustainable results.

**How can you improve this program going forward? (20 pts)**

We are pleased to share that we have implemented several key initiatives to support the professional development and motivation of our Executive Director, fostering a culture of continuous improvement within our organization.

Membership Incentive Program:

We have established a membership incentive program to financially motivate our Executive Director to continue driving growth in our membership base.

Performance Review Process:

Recognizing the importance of constructive feedback, we have instituted a performance review process for our Executive Director. This provides a structured framework for assessing achievements, addressing challenges, and setting strategic goals aligned with the chapter's vision

Professional Development Support:

To support the educational growth goals of our Executive Director, we have enrolled them in an external education program, CalSAE. This initiative not only serves as a support system but also aligns with our commitment to continuous growth in professional development.

Board's 2024 Goal – Policies and Procedures Manual:

Looking ahead, our Board has set a goal for 2024 to create a comprehensive policies and procedures manual. This manual will serve as a foundational document, outlining the standards and practices that guide our operations. Its creation will contribute significantly to the overall success and sustainability of our chapter.

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

**Would you like to upload additional documents?**

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**Would you like to share a link?**

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