

# THE CAI CHAPTER IMPACT 2023 YEAR IN REVIEW



When reflecting on 2023, we think fast and busy. It was the year to do all things we were unable to do the last few years. Instead of the slowdown of 2020 and 2021, we were fully into making everything happen. CAI's 64 chapters returned to large events put on hold, embraced some education remaining virtual and that others need to be in person. As an organization chapters and headquarters (CAI HQ) evaluated what is necessary and what is nice to have focusing on member value and experiences while considering financial and time investments. We continued to collaborate, learn, and grow together and challenged some norms together. We've used creativity, positivity, diplomacy, and integrity to rise to new challenges and increased demands. It is with gratitude for our talented chapter executive directors and dedicated chapter leaders that we move on to 2024...CAI is more successful with you! Before we leave 2023, please review the highlights of all we've accomplished together.

## Membership

- Our 64 chapters represent over 45,000 members around the country and the world.
- In the calendar year 2023, CAI grew by 2.8%.
- Manager memberships and the addition of chapter memberships for Business Partners and Management Companies continue to grow to record high totals.
- We launched Express Pay this year, a quicker, easier way to pay for renewals with the addition of a pdf invoice for every member.

## Advocacy

- CAI chapters support 36 state and one Federal legislative action committee (LACs have 462 active volunteers.)
- CAI tracked more than 2,300 state bills in 2023 impacting chapter members. Notable legislative initiatives in 2023 were condominium safety (i.e. reserve studies and funding, and building inspections), community values such as solar energy and electric vehicle charging, and the simplified removal of discriminatory restrictive covenants.
- Seven states (Florida, Illinois, Michigan, Texas, California, Missouri, and Pennsylvania) held advocacy events, meeting with state legislators to advocate on behalf of the community association housing model.
- Chapters across the country partnered with their Legislative Action Committees to provide legislative updates on law changes in the states.

## Education

- Over the past twelve months, CAI chapters collectively held:
  - ✓ 500+ In-person Educational Events
  - ✓ More than 350 Live Virtual Educational Events
  - ✓ More than 15 Live Hybrid Educational Events
  - ✓ 85+ In-Person Tradeshows and Mini Expos
  - ✓ One Virtual Tradeshow
  - ✓ 350+ In-person Social and Networking Events
  - ✓ More than 15 Virtual Social and Networking Events
- Chapters used Zoom to engage members in a virtual environment, resulting in chapter members spending more than 4,200,000 minutes on Zoom in 2023.
- We continued the CAIHQ/chapter partnership to present **Community Conversations Live**, a live quarterly webinar series providing international panelists with local breakout sessions. Third-year results were 1,100 attendees over four sessions.
- The **Chapter Knowledge Series** was continued, providing educational sessions from chapter leaders and headquarters staff on relevant topics.
- CAIHQ continues sharing registration lists of manager education (PMDP) and **Community Conversations Live** registrant lists by chapter to further promote educational opportunities.
- Chapters promoted designations and higher learning to members resulting in new:

<b>AMS:</b> 450	<b>CIRMS:</b> 4	<b>PCAM:</b> 89	<b>Board Leader Certificate:</b> 730
<b>AAMC:</b> 7	<b>CMCA:</b> 886	<b>RS:</b> 29	<b>Educated Business Partner:</b> 13
<b>CCAL:</b> 11	<b>LSM:</b> 7		

## Networking

- CAIHQ hosted 11 watercooler conversations with CEDs. This provided an opportunity for informal conversations to brainstorm and share.
- CAIHQ hosted monthly chapter president sharing sessions generating stronger relationships with CAIHQ staff, chapter leaders and amongst the chapter leader network.
- 2023 saw an increase in participation from chapter presidents and presidents-elect.
- The CED Retreat and Chapter Leader Lounge at annual conference provided chapter leaders time to share best practices and ideas.

## Awareness/Communication

- We witnessed more members engage on social media by liking and sharing CAI content and opening emails to find new and updated resources in their inbox.
- 60 chapters are on social media platforms including Facebook, Twitter, Instagram, LinkedIn, YouTube and TikTok.
- Diversity, Equity and Inclusion continued to be a focus for CAIHQ and chapters with several chapters establishing DEI committees or taskforces, producing a **Chapter Knowledge Series** and development of tools and articles for chapter use.

## Financial Sustainability

- Chapters continued creating innovative new sponsorship opportunities generating new revenue streams for virtual and in-person programming.
- CAIHQ continues sharing 8% of registration payments for manager education (PMDP) courses to the chapters.
- Many chapters reported an increase in sponsorship sales and registration fees leading to pre-pandemic revenue streams.
- CAIHQ increased the percentage of membership dues rebates in January 2023, Non Service Provider Business Partner membership rebates increased to 35% (up from 25%), Service Provider membership rebates decreased to 45% (down from 50%) and Management Company memberships increased to 35% (up from 25%).
- Chapter Leadership Training Grant and the Chapter Technology Grant Opportunities:
  - The Chapter Leadership Training Grant provides new Chapter Executive Directors an opportunity to train with and visit another chapter or provide chapter leadership training (board and CED) best provided by a third party outside of HQ staff.
  - The Chapter Technology Grant is for enhancing the members' experience and/or streamlining internal administrative processes through technology.
  - Seven technology grants and 10 leadership grants were awarded.

## Operations Management

- CAI chapters include more than 500 volunteers as chapter board members.
  - 39%** are Managers
  - 41%** are Business Partners
  - 20%** are Homeowner Leaders
- Chapters provide volunteer opportunities to approximately 3,000-chapter members serving on more than 350 committees nationally and around the globe.
- CAIHQ facilitated 14 chapter strategic planning sessions, as well as 58 additional chapter visits, including speaking, participating in virtual trade shows, leadership training, etc.
- We all continued adapting to a remote or hybrid work model with some chapters reducing or eliminating office space.
- For the third year, ASAE memberships were provided by CAIHQ to all chapter executive directors to allow access to professional resources and education.
- CAIHQ invested in Zoom for a third year to provide all chapters video call and meeting access, resulting in 4,500,000 minutes of chapter content and meetings.

## Headquarters Staffing

The Chapter and Membership teams underwent changes in both reporting structure and responsibilities. Born from a strategic planning process which guided us to work toward our team and organizational goals and create efficiencies, CAI invested in a new regional support staff member. We are excited to see the teams evolve and serve our growing organization!

Below is information on the roles and responsibilities of our team members impacted by these changes for clarification purposes.

**Karen McMullen, Senior Director, Chapter and Member Engagement.** In this new role, Karen will focus on enhancing chapter leader and CAI member engagement, coordinate HQ communications to chapters, develop in-person chapter leadership training content, oversee the National Service Directory and coordinate membership surveys and assessments. Karen will continue to provide chapter support to the Northeast portion of the U.S.

**Kristi Van Buren, Senior Director, Member Development and Operations.** Kristi now manages the membership team, overseeing all member recruitment and retention strategies, new and renewal member processes and compiles membership data, statistics, and trends. Kristi supervises the following team members.

**Laura Mason**, Manager, Membership, focuses on member outreach and recruitment efforts.

**Scott Norris**, Coordinator, Membership, focuses on membership processes including monthly invoicing and data integrity.

**Kelly Schild, Director, Chapter Development and Operations.** Kelly now manages the chapter team including training CEDs and other chapter staff, coordinating chapter visits and virtual training content, monthly chapter Zoom sessions, Community Conversations Live, and chapter surveys and statistics. Kelly supervises the following team members.

**Emily Jennings, Senior Manager, Chapter Support and Development (Southeast).** In addition to providing chapter support in the Southeastern portion of the US, Emily is the lead for CED onboarding and chapter staff transitions, support to struggling chapters, our chapter resource program, and chapter reports and awards.

**Alicia Taplin, Manager, Chapter Support and Development (Southwest).** This is a new regional chapter support position serving the Southwest portion of the US, including Nevada, Utah, Arizona, and Texas.

**Crystal Wallace, Senior Vice President, Membership & Chapter Relations** continues to oversee both the membership and chapter relations team, as well as the member service center staff. Additionally, she is the liaison to the Community Association Managers Council, staff lead for the Large-Scale and High-Rise Managers Workshop and CAI's Diversity, Equity and Inclusion initiatives.

**Grace Dang, Coordinator, Chapter & Volunteer Relations**, continues to provide administrative support to the chapter and governance teams.

CAI chapters are what makes CAI great! Through flexibility, sharing, innovation and implementing new ideas, look at all we've accomplished! In 2024, we anticipate continued growth in all areas and more evolution as we move forward.

***Congratulations and thank you for all you do for CAI and our members!***