

Page: Entry Information

Chapter

CAI-CV

Chapter Size

Very Large (761-1200)

Category

Leadership

Program Name

CAI-CV Succession Planning Program

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)

CAI-CV's Succession Planning Program was developed to make the Chapter more effective, to help the Chapter be prepared for people dropping from the board, to ensure that new people joining the board are aligned with the established goals and objectives of the Chapter, to fully educate potential board members about CAI services, and to provide training aimed at developing servant leaders over a two-year period prior to being eligible to serve on the Chapter board.

Responsibility for this program belongs to a newly created Standing Committee, called the Strategic Planning Committee, which is comprised of the Board's Executive Committee (President, President-Elect, Past President, Secretary & Treasurer) and has often included an additional member, usually an attorney member of the board. The Strategic Planning Committee meets monthly prior to the full Board meeting. They have responsibilities other than succession planning including financial planning and oversight, succession planning for staff, and maintaining an overall course for the Chapter that stays aligned with the goals and objectives outlined in the strategic plan.

The specific authority for succession planning comes from the Chapter's amended bylaws where a requirement was added, stating that to be eligible to run for the CAI-CV Board of Directors (we have elections) a member must (among other requirements) have served in a committee leadership capacity (chair, co-chair or LAC delegate) for at least one year.

This change created a way for the Board to vet potential board members by watching how they lead while they serve in committee leadership positions. Typically, committee leadership changes annually, with the co-chairs moving up to the chair position, and another committee member moving to co-chair. Committee leadership is decided annually by the board with input from the committees. This process means that at any moment, CAI-CV has between 15 and 30 people who could qualify to run for the board.

Another change to the committee structure was to require that all committees strive to have all three membership classes represented among their volunteers. The board then makes sure that all three membership classes are represented in the committee leadership pool, which ensures that representatives from all three membership classes are eligible to serve on the board should the need arise as in the case of an unplanned resignation, or when it is time for the annual elections. This change has had many positive outcomes. The Chapter no longer has trouble finding Homeowner Leaders to serve on the board or in leadership positions. All committees have seen the value of including perspectives from all three membership types. Committee projects are being accomplished and immediately supported by the general membership because they make sense to everyone.

An important part of the Succession Planning Program is to provide CAI-CV leaders with the tools they need to succeed. Committee leadership (Chairs and Co-Chairs) are trained and provided online resources to assist them. See: <https://www.cai-cv.org/page/CommitteeToolsPublicationsResources>

Included in leadership training are modules about finding multiple temperaments to serve and nurturing the perspectives from different personality types. Not only does each committee work to have all three membership classes, they are also encouraged to have as many temperaments represented. This rises up to the pool available to the board and is considered when choosing potential leaders.

Each committee has a Board Liaison - a member of the board that has experience with that committee. The Board Liaison provides additional training and ongoing support to ensure the new leaders succeed. Board Liaisons may also make most Board-level decisions so the Committees are not slowed down waiting for the next board meeting. The Liaison reports to the board and decisions are ratified by the full board if needed.

To ensure that potential board members are familiar with the Chapter's finances, the committee leadership and Board Liaison have responsibility for their own budgets. Nearly all of CAI-CV's budget is divided among the various standing committees so that many eyes are watching finances all the time. This creates transparency and accountability. Board liaisons provide monthly financial updates to the full Board.

The objectives of the Succession Planning Program have been met and the results overwhelmingly positive.

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

The CAI-CV board is now comprised of CAI-educated members, who believe in the direction outlined in the Chapter's strategic plan. They have been vetted and are true servant leaders. They represent all three membership groups. Further, the Board now has a pool of eligible members who can at a moment's notice be appointed to the board without disruption to the chapter.

The Succession Planning Program changed how the Board, Committee Chairs, Co-Chairs, and volunteer members view their volunteerism with the Chapter. They see themselves as part of the Chapter's leadership training program (something for them) and as part of the Chapter's leadership and decision-making body (accountability). By moving Committee leadership to a succession planning program for Board service, volunteers have a new and visible level of motivation. The Chapter is moving toward its goals and objectives like a large ship. With slight corrections, it keeps going, regardless of who is in charge at the moment. Cronyism, which the Chapter struggled with for more than 30 of its 40 years, is no longer a problem.

For example, we recently had a longtime manager member who had served on the board for five years unexpectedly resign with one year left to serve. I am attaching a document similar to the one the board used to see the succession plan at a glance. On the worksheet, is the list of eligible members who have served in a leadership capacity and who have been vetted. The list is broken down into the three membership classes, and the current board terms are listed. They could see at a glance that we have two Homeowner Leaders going off the board at the end of 2022. The appropriate action to take was to appoint a Homeowner Leader to fill out the term of the resigned board member. In that category, they chose the person with the most experience. The entire process took about an hour. There was a brief discussion by the board but no dissension. A new board member was appointed and the Chapter continued its business without a hiccup.

Chapter Mission Statement:

The mission of the Community Association's Institute - Coachella Valley Chapter is to be the authoritative source for HOA education, leadership development, and networking, providing HOA boards, managers, and supporting businesses the tools they need to foster BETTER HOA LIVING.

The Chapter Succession Planning Program creates a team atmosphere that fosters innovation to achieve our mission. The Chapter is no longer bogged down with internal politics and drama. All the energy exerted by CAI-CV volunteers if focused on elevating the HOA industry.

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.) (20pts)

When the Succession Planning Program was implemented, the Board decided they would measure its success on two key factors. First, on Chapter growth, and second, they would use surveys and polls.

While there have been many positive outcomes of the Succession Planning Program, Chapter growth has been significant. Right after Covid hit, membership was below 700. Today, we have 800 members, adding more than 100 new members in the past two years - and doubling membership from six years ago. Given that most of our events were canceled, this is a sign that even in a crisis the Chapter was able to stay on track and that the HOA community saw the value of membership. This is particularly noteworthy due to our geographic isolation. The Coachella Valley is situated more than an hour from any other region, so the population has stayed relatively static. The Chapter's growth was directly correlated to the Chapter's Board's and Membership Committee's effective efforts.

To ensure regular feedback from members, the Board asked the education committees to survey (for in-person meetings) or poll (for Zoom education) members after every educational session. Attached is a sample evaluation form. The results from these surveys and polls are presented by the Board Liaison to the board each month. This builds accountability between the board and committee leadership/volunteers. Overwhelmingly, the polls and surveys have been very positive. The questions are designed to gain feedback for future programs, and as a way to measure the general perception of our members. For example, we ask if they would recommend CAI-CV education to others. We also ask if they will attend future programs. Negative answers would raise an immediate red flag and indicate the Chapter needed to adjust. These also indicate the value members feel they are receiving for their investment.

The Succession Planning Program clearly elevated expectations, accountability, and outcomes of CAI-CV programs.

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

Given the mess caused by the pandemic, the Chapter experienced some surprising outcomes.

Membership Growth

Membership of the Chapter increased by 15 percent during the pandemic and our retention rate was higher than CAI National. These data indicate a high level of member satisfaction.

High Level of Satisfaction

In 2021, the Chapter significantly reduced in-person fundraising events and instead held just over 50 local educational classes for managers (13), homeowner leaders (36), and business partners (3).

Here are the outcomes of some of the survey questions:

Did the program meet your expectations? 96% Exceptional

Will you recommend these programs to others? 99 % Yes

Will you attend future programs? 100% (of those answering) Yes

The Succession Planning Program and subsequent leadership capabilities, and the fact that everyone was working together, motivated the Chapter's 150 volunteers to adjust for Covid and creatively find ways to provide value for our members.

One additional outcome is worth mentioning. I already provided the example of replacing a board member who resigned. During 2021, due to career changes and other external issues, we had to replace four of the Chairs and Co-Chairs. The Succession Planning Program made that simple and fast. When you are invited to serve as one of the Chapter's leaders, it's an honor. The Committee volunteers start thinking about whether they want to rise to a leadership position right away. There is no pressure, only opportunity.

Based on the results, will the program be a regular part of the chapter's programs in the future and why?

Yes, the Succession Planning Program will continue to be a major part of CAI-CV for the foreseeable future. The program has helped the Chapter stay focused on its mission, and to accomplish many projects, programs, and events that meet the needs of our members and the local HOA industry. With two staff, and 150 volunteers, the Chapter has had some outstanding accomplishments. This could not have happened without the loyal work of our servant leaders.

Attachments:

PowerPoint Presentation to CEDs on January 14th about the Succession Planning Program.

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?

Yes

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