

**Page: Entry Information**

**Chapter**

CAI-IL

**Chapter Size**

Extra Large (1201+)

**Category**

Leadership

**Program Name**

Succession Planning & Volunteer Management

**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)**

Three years ago, we developed the Volunteer Commission to help with volunteer placement. This function has grown into an integral part of our chapter which now includes:

1. Volunteer Orientation, Placement, & Onboarding--we conduct an orientation twice per year where we explain chapter operations and review volunteer expectations. We interview candidates for appropriate committee placement and provide onboarding documents like committee minutes and the strategic plan. (See Volunteer Application and Presentation\_VolunteerOrientation\_2021\_03\_02) File 1 & 2
2. Committee Chair Training--To help committee chairs lead successfully, we developed four training videos which cover Roles & Responsibilities, Communication, Leadership, and Meeting Management. We additionally developed a resource guide which includes all documentation a committee chair may need. (See 3TableOfContents\_CommitteeChair\_ResourceGuide) File 3
3. Volunteer Appreciation & Satisfaction--The Volunteer Commission calls Committee Chairs and Volunteers to make sure they are satisfied with their volunteer roles. They also send appreciation notes/gifts and highlight volunteers in the chapter's quarterly magazine. (See Article\_VolunteerSpotlight) File 4
4. Succession Planning--The Commission put a Committee Chair Succession Plan in place to help with leadership training and to provide chairs with graceful way to exit a chair position. This three-year term where a person serves as a Vice Chair for one year and a Chair for two years and trains the next Vice Chair during the second year has assured new ideas and leaders are celebrated. (See 5Policy\_SuccessionPlanning\_CommitteeChair) File 5
5. Volunteer Recommitment--We ask volunteers to recommit to their committees every year in August. They sign a form stating they understand the responsibilities. This allows them to evaluate their commitment and gracefully exit a committee without 'quitting'. It also helps with difficult conversations when a volunteer isn't attending meetings or pulling their weight, we can point to what they agreed to on the form. (See 6Form\_Volunteer\_Recommitment\_2021\_05\_20) File 6

This program fits the Leadership awards section because it enhances our leadership identification, selection, and coaching process. It is allowing for more leaders to step forward in the chapter.

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

CAI-IL Vision

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.

CAI-IL Mission

The mission of CAI-IL is to provide education, legislative advocacy, and professional service resources to achieve excellence in community associations.

This program meets the mission of the chapter because by enhancing our volunteer process and continually coaching new leaders, we inspire community association excellence and effective leadership.

**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)**

The Succession Planning & Volunteer Management program has had a very positive impact on the chapter in four significant ways:

1. We've had an influx of volunteers since we began limiting when and how volunteers are placed. It has become more of an exclusive honor to serve on a committee. Those that go through the volunteer orientation together form a sort of "pledge class" and become friends and contacts at future events. (See 7VolunteerCommission\_group\_Photo) File 7
2. We now have a consistent search for future leaders and a constant flow of new leaders stepping up. We used to have chairs in the role sometimes for 10 years. Now every committee knows that new leaders are needed every three years.
3. We've established a structured timing for volunteer placement which saves hours of staff time.
4. By requiring volunteers to attend one of two yearly orientations before they can be on a committee, we test their commitment before they even start. Volunteers who prioritize the orientation will likely prioritize committee responsibilities.

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

1. Volunteer growth--We used to place about 25 volunteers per year. In 2020, after implementing this program, we placed 52.
2. Coaching future leaders--We have elected 11 new Committee Chairs and Vice Chairs in the last 12 months. Previously there have been years where NO new Committee Chairs were elected.
3. Staff time savings--The unstructured process of volunteer placement used to take about 1 hour of staff time per volunteer, reviewing chapter policies and committee expectations, which amounted to about 25 hours per year. Now running two orientations to place 52 volunteers only takes about four hours.
4. Volunteer engagement--By attending the orientation, volunteers hit the ground running when they start on a committee. We've noticed volunteers speaking up more readily and of the 11 new chairs placed last year, seven of them are orientation graduates.

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

The chapter will absolutely continue our efforts with Succession Planning & Volunteer Management. We intend to enhance the effort to include additional Committee Chair training and support and also conduct additional outreach to volunteers after placement to check their committee placement satisfaction.

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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