

Page: Entry Information

Chapter

CAI Keystone Chapter

Chapter Size

Extra Large (1201+)

Category

Membership Engagement

Program Name

Member Onboarding & Engagement Plan

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)

In 2021, the chapter convened a New Member Onboarding & Experience Task Force to draw up a member engagement plan to address the new member onboarding process, creation of a new member ambassador program, upgrades to the chapter website, utilization of a member community on the chapter website, and increasing and tracking overall member engagement in the chapter.

The Task Force met over the course of 5 months and created two subcommittees to examine Member Onboarding and Member Engagement. The work of the task force resulted in the adoption of the chapter's Member Onboarding & Engagement Plan by the chapter Board of Directors at its June 2021 meeting.

The plan, which is currently in the implementation phase contains the following elements, all of which fit remarkably well into this award category:

- New Member Ambassador Program
- New Member Virtual Orientation
- New Member Surveys
- Member Engagement via a member community and online forums
- A new chapter website set to launch in early February 2022

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

This project had its origins in the pandemic and the world of virtual programming, as well as the chapter's recent business plans which included objectives to increase member engagement, especially via the chapter's website and our new ability, in 2020, to host a member community and online forums similar to the CAI Exchange, on the chapter website through our new association management system which was implemented in March, 2020. The chapter Board saw a need during the first year of the pandemic to figure out a way to increase member engagement in the chapter in the absence of in-person experiences, while also working on strengthening member retention, as we saw a significant membership decrease during the first year of the pandemic. To combat these issues, the Board created the New Member Onboarding & Experience Task Force. The resulting plan and initiatives all serve to increase member retention, stem the loss of first year members, and increase member satisfaction and engagement in the chapter, thereby strengthening the organization and helping to fulfill the mission of the chapter and CAI as a whole.

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 Board of Directors adopted the Member Onboarding & Engagement Plan in June 2021 and the plan is in the process of being fully implemented. The following accomplishments are a direct result of the task force and the plan:

- The Member Onboarding & Engagement Task Force was transitioned to a permanent Member Outreach & Engagement Committee in 2022 which will be permanently chaired by the chapter's President-elect, thereby elevating the importance of the committee, and giving the Board full buy-in to the engagement of members on a continual basis.
- A New Member Ambassadors Program was implemented on a test-basis in October 2021 and transitioned to a fully operational program in January 2022. New Member Ambassadors must meet minimum requirements to serve as an Ambassador, such as minimum length of CAI membership, a demonstrable one-year track record of engagement in the chapter, and achievement of various CAI credentials by member-type (CMCA, EBP, Board Leader Certificate, etc.)
- A New Member Onboarding Program & Timeline was created, including a mailed welcome kit, automated email welcome campaign, assignment of New Member Ambassadors on a monthly basis, website orientation, new member virtual welcome events, retention phone calls, and a feedback mechanism for Ambassadors to report feedback to the chapter. A Microsoft Teams site was established to house all of the New Member Ambassador information, including orientation documents, new member lists, a chat area for Ambassadors to communicate with each other and CAI staff, and an online reporting form to compile all feedback from Ambassadors after their connections with their assigned new members. Data from various new member surveys will be published and available to the Member Outreach & Engagement Committee and the Board.
- Quarterly New Member Welcome & Orientation virtual events have been scheduled, including a new member breakfast at the chapter's Annual Conference & Expo. The virtual events utilize Zoom breakout rooms so members can meet and share by member type (managers in one room, business partners and homeowners in their own rooms, etc.).
- Activity has increased in the Member Community, which the chapter has actively promoted in the last few months. By way of explanation, the member community is similar to a social media site, like Facebook or LinkedIn, where the chapter and members can post, like, share and comment. Online Forums for members have been created within the community, similar to the CAI Exchange.
- The chapter initiated an RFP for a newly designed website in July 2021, selected a vendor in September 2021 and the new website is scheduled for launch in early February 2022. The new website has improved navigation so visitors can more easily find what they are looking for, an improved blog for educational content, and will be fully integrated with the chapters membership management system, learning management system and member community, creating a seamless online experience for members who are increasingly engaging with the chapter via the website and other online resources.
- Chapter Committees are engaged on a regular basis on content – what types of educational programs and online educational content our members want to see.
- Various reports are used to monitor engagement via the member community, including who is logging in to the site, and the use of website engagement scores to determine leading contributors in the member community.

The end result of all of this activity is more members fully engaged in the chapter and a fuller utilization of the technology that the chapter has heavily invested in over the last few years. Member value in the chapter has increased and those members that have attended new member orientations or participated in the member community do have a better relationship with the chapter and are more regularly engaged and "touched" by the chapter. As an example, two business partners who attended the January 2022 Virtual New Member Orientation purchased an exhibit booth for the chapter's 2022 trade show immediately after the virtual event ended. More members feel "connected" with each other via the member community and other outreach aspects of the member engagement plan.

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

While the entire program is still being fully implemented, we have already seen the following successes:

1. In the first four months of the testing of the New Member Ambassador program from September to December 2021, Ambassadors reached out to welcome 171 new chapter members across all member categories.
2. Thirteen New Member Ambassadors were appointed for 2022 and an orientation took place on February 1, 2022, with outreach planned to begin in mid-February to new members who joined the chapter in January 2022.
3. Two interactive online forums have been established on the chapter website – a general member forum, and a high rise buildings member forum - where members can post and comment, similar to the CAI Exchange. While initial activity in the forums has been limited, the chapter plans an active promotion of the forums once the chapter’s new website is launched in early February.
4. Activity in the member community (outside of the two forums noted above) has ramped up significantly in the closing months of 2021 and early 2022, with chapter committee chairs and volunteers taking the lead with adding profile pictures to their profile, posting and sharing information on chapter events and programs, and welcoming new members as they join the community (see screenshots included with this submission). See quantifiable data below:

A. Profile Log-ins have increased significantly over the last half of 2021:

- Between July 1, 2021, and September 30, 2021, 117 members logged in to their profile in the member community.
- Between October 1, 2021, and December 31, 2021, 147 members logged in to their member profile.
- Between January 1, 2022, and February 3, 2022, 321 members logged in to their member profile, representing a significant increase in online engagement with the chapter.

B. Member profile updates have also increased – in the third and fourth quarter of 2021, there were 59 member profile updates. From January 1 to February 3, 2022, there have been 85 member profile updates (contact info updates, mail and email preferences, etc.) as more members log in to their profiles and engage with the chapter online.

C. More than 300 members have added a profile picture.

Virtual new member orientations have resulted in more active and engaged members. As noted previously, two new business partner members who attended the January 2022 Virtual New Member Orientation bought an exhibit booth for the chapter’s May 2022 trade show immediately following the conclusion of the new member orientation event. The active conversations in the member-type breakout rooms during the virtual new member orientation events has been particularly significant among homeowner members. After the first virtual new member orientation on September 24, 2021, two new homeowner members volunteered to join the chapter’s Homeowners Committee for 2022.

As the full Member Engagement Plan ramps up in 2022, new member ambassadors will be assigned to attend events, new member surveys will begin to go out automatically to new members, and automated outreach to un-engaged members will be implemented with data reporting to the committee and to the board.

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

One word answer – yes. While we cannot yet point to an increase in member retention because the program is in its initial stages and still being fully rolled out, it has been exciting to witness the increase in engagement on the chapter website and in the member community. We believe this will only grow once our new website goes live in February 2022.

The feedback we are receiving from the New Member Ambassadors is extremely valuable and will inform the board and the staff on changes that may need to be made within the chapter. We anticipate receiving more valuable feedback from new member surveys in the coming months.

Based on early results and feedback, we expect significant results from the full implementation of the Member Onboarding & Engagement Plan.

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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