

Application: 10050

Beers, Rick

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**Page: Entry Information**

**Submitted By**

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**Chapter**

Central Virginia

**Chapter Size**

Large (511-760)

**Category**

Leadership

**Program Name**

Strategic Business 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)**

Coming out of COVID, we asked ourselves what we could do to jumpstart growth. Although CVC-CAI's region is comprised of rapidly growing cities and counties, a booming metropolis, and significant growth in 'destination communities' attracting retirees and remote workers, membership levels had been stagnant for over 5 years. We needed a reset of the chapter and initiated a 2-step process to first discuss at a strategic level what we wanted to be, and then to create a Business Plan to guide and track our progress.

That Business Plan, which is attached to this submission, was completed and approved by the board in January. Chapter Goals and the metrics to be used in tracking progress against those goals is available to membership on our website, is sent to all new members, and is used as a guide during our joint board/committee chair semi-annual reviews. The innovation with that business plan is that it is balanced with three transformational and tactical goals.

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

Early on in the strategic planning process, we adjusted our mission statement, which now states: "The purpose of the Central VA Chapter is to provide education, networking, resources and advocacy for community associations and the professionals and volunteers who serve them, all while striving to improve their membership experience in achieving their own goals." The last statement had a huge impact on the business plan itself and the success that we have had in achieving our goals. It changed the way we look at ourselves and how we serve our membership.

We then envisioned four key themes and an approach to pursue them:

1. Enriched membership experience.
2. Flawless execution upon CAI's Mission and Values.
3. Streamlined and/Automated internal processes.
4. Organic growth in membership and revenue.

Critical to our success was a clear differentiation in value propositions across the three types of membership within Community Associations Institute (CAI): Community Managers, Business Partners, and Community Association Volunteer Leaders (CAVL's), and the adoption of a business technology platform that enables all four themes.

**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)**

As the data will support in the next question, 2023 has been a remarkable year for the Central Virginia Chapter. The emphasis on Member Experience has been felt by Managers and Partners alike, who are visibly excited and more engaged. For example, Managers are increasingly energized to promote CAI to the associations' boards, and it is gaining results. Perhaps the most notable being that our membership increases have resulted in the Central Virginia Chapter qualifying as a Large Chapter status for the first time in our 25 year history.

As the momentum builds, our CED is developing relationships with adjacent chapters with shared educational and social events. There is a buzz developing and we expect the momentum to continue to build in 2024.

Additionally, our committees are operating in high gear. We held a very successful golf event during 2023, our first in 5 years. We have doubled our programs' educational credits and doubled our number of social events. At the board level, the structured focus on business planning and tracking results has led to more productive and focused board meetings.

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

As the numbers show, we had a remarkable year:

At a chapter level, we held 27 total hours of education for a total of 18 continuing credit hours (the most ever in both categories), four local social events, our first-ever joint event with the Southeast Virginia chapter in Williamsburg, brought the golf tournament back after over a five-year pause, had the largest number of exhibitor booths (58) and attendees (194) at our CA Day Trade Show and Expo, elevated our Consensus publication visually and with our content, the largest number of Annual Sponsor Partners in history (27), the most Annual Luncheon attendees (142), partnered with the Southwest VA and Washington Metro Chapter for the most successful Virginia Leadership Retreat to date, restored our Membership Committee, launched our Homeowner Leader Network initiative, and became a large chapter for the first time in history.

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

The process was developed to be systematically followed each year, and the Business Plan itself was developed as a living document. The expectation is that the program will be part of the chapter's programs in the future.

Beginning each year with the new board's first meeting in December, we will first evaluate performance against goals for that year. We will then discuss the strategic outlook for the next year through a 'mini SWOT' analysis. Finally, we will update the Business Plan, including goals and metrics, retaining an appropriate balance between strategic and tactical areas of focus.

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

**fileUpload2**

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