

Page: Entry Information

Chapter

CAI - San Diego

Chapter Size

Very Large (761-1200)

Category

Membership Engagement

Program Name

HOA Academy

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)

HOA Academy is a program for volunteer leaders and managers designed to teach the fundamentals of community association governance. Sessions are held once a week for four weeks with each session covering designated topics to allow for an in-depth coverage of the topic. The sessions start with a two and half hour session on legal issues. The second session is two hours addressing insurance for community associations. The third session is made up of two one-hour sessions covering reserves and finance. The fourth session is two hours addressing maintenance, contracts and bidding.

Participants may enroll in a single class or take all four to receive a graduation certificate from CAI's HOA Academy.

The Education Services Committee of the San Diego Chapter was looking for an effective way to engage and educate board members and other community association volunteers who might not otherwise participate in chapter events. Historically, homeowner leader participation with the San Diego Chapter has been very low, and thus the HOA Academy focused on the education needs of homeowner leaders. The inaugural event in September 2021 was very successful and exceeded expectations with ___ participants attending all four sessions and 60 participants attending at least one session. This attendance was greater than almost all other chapter events held in the last few years and the reviews by the participants were overwhelmingly positive.

Given the success of the program, the San Diego Chapter decided to hold the course again beginning February 1, 2022 and the first session had over 50 participants in attendance.

This course is unique in targeting board members and filling a need for educating these volunteers on how to effectively serve on their community association boards. Board members are far less likely than managers to attend the usual industry events and this program gives them the tools they need to be effective board members while also creating a very positive experience with San Diego Chapter

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

The San Diego Chapter's mission statement is, "To reach all members by promoting the understanding of responsible governance and operations through education, communication and professional ethics."

Its Vision is to be "The premier provider of education, advocacy and resources for Community Associations."

HOA Academy epitomizes the Chapter's mission and vision in that it emphasizes education and reaches out to members who have not been active in the San Diego Chapter. HOA Academy bridges the gap to homeowner leaders to help them see the benefits of CAI. HOA Academy also provides a broader, more extensive level of education to board members than any previous class or presentation format in San Diego.

Board members receive in-depth education on the most important and pressing issues which board members need to address on a day-to-day basis in their communities. Board members are volunteers and many of them have never been taught how to run what is in essence a multimillion dollar business. From how to read and understand financial reports and reserve studies to properly conducting meetings, much is expected of these volunteer board members yet there has been very little in-depth training available to them until now. By providing this training through HOA Academy, the Chapter is fulfilling its mission of promoting the understanding of the board's role through education and has become the premier provider of education in San Diego for board members.

While the San Diego Chapter provides numerous other types of programs throughout the year, HOA Academy stands out in providing an in-depth course providing the foundation for board members to understand their role and responsibilities. There is no other program that provides this breadth and depth of education to board members in San Diego.

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 program has an extremely positive impact on the Chapter. The program provided a unique opportunity to market and serve one of our least represented sectors - Homeowners. Homeowner leaders who are normally not engaged in Chapter programming were the largest sector of attendance for the Academy. Of the 119 unique individuals to attend at least one of the four sessions 94 of those individuals were homeowner leaders. Attendance list is submitted.

Management Companies and Business Partners took note of the increased attraction of homeowners to the program and both sectors sponsored the event as a way to reach that market.

At the Chapter's January 2022 Awards Gala, the Education Services Committee, who is responsible for the program, was named Committee of the Year for 2021. Part of the reason for the committee's selection was the success of the HOA Academy.

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

As these programs were done virtually over Zoom, there were no hard costs for the Chapter involved. The Chapter gained \$3,255 in new sponsorship funds in 2021 for the program.

In 2022, two Academy programs are being offered - one in February and one in September. Sponsorships for the programs sold out in the 2022 Marketing Plan, more than doubling the revenue in 2021. The total revenue for the program in 2022 is currently at \$8,625. Sponsorship income for both programs is being submitted.

The overall evaluations for the Academy were extremely positive, with each session garnering excellent or good overall ratings. Individual session evaluations are submitted.

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

The program was so popular and well received that the Board authorized including two sessions in 2022 - one in February and one in September. The program was included in the 2022 Marketing Plan with plans to continue the Academy for the foreseeable future.

The program meets an underserved sector of our membership and the industry and fits within the Chapter's mission and vision statements. Chapter leadership sees it as a positive representation of the Chapter and CAI as a whole.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

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