Application: 11377

Page: Entry Information

Chapter

CAI North Carolina Chapter

Chapter Size

Extra Large (1201+)

Category

Membership Engagement

Program Name

New Chapter Website

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)

The new chapter website launched in July 2024 directly improves and enhances the overall membership experience, satisfaction, and value of CAI. Current and prospective members gained new values:

CORPORATE MEMBERS:
Management companies and Business Partner firms:
The enhanced "Find a Business" directory is now a separate dedicated company level directory. These member companies are now much more "findable" by both chapter members and the public, providing a unique marketing exposure and premium co-branding with CAI.

This company level "Find a Business" Directory: Visitors can now search in one place for:
-All member management companies
-Accredited Management Companies only
-Management companies by annual sponsor level
-Business Partner firms by category
-Business Partner firms by annual sponsor level
-Any company by geographic areas served across the state

INDIVIDUAL MEMBERS:
The enhanced "Find a Member" Directory showcases individual manager and homeowner members to both members and non-member visitors. However it is designed to protect their privacy in that visitors cannot see or download a list of these individuals.

Visitors can search by last name or by CAI designations or distinctions.

>The resulting Manager information includes the employer or community name and the given manager's geographic area base (more helpful and more private than specific address).
The profile also showcases the manager's CAI designations – in keeping with the chapter's Board's strategic initiative of Advancing Professionalism.

In addition, the manager's email address is protected from public view, but any user can launch an email to them via this search result. With one click public users can also reach out to their own social media accounts as applicable to post a comment to the manager.

>The resulting Homeowner information is intentionally designed to include nothing but their name, in order to allow public visitor confirmation of their member status only.

How did this program meet the mission and vision of the chapter and CAI as a whole including fostering an inclusive environment that reflects and serves our diverse community? (20pts)

CAI's Vision "To be the global leader advancing excellence in community association living" and Mission "to advance community association governance, management, and quality of life by inspiring professionalism, effective leadership, and responsible citizenship" are well served by this website navigation scheme.

TOP LEVEL: Its 4 "utility" quick links at the top of the homepage offer the two Directories as addressed above, plus a Membership portal and Sign-in. These are general in nature, equally applicable and valuable to broad internal and external audiences.

SECOND/MAIN LEVEL: the primary navigation bar of actual resource content is designed as an intentional combination of both vertical and horizontal access portals for audiences seeking information and assistance. We considered the diverse constituencies of current members, prospective members, general homeowners, prospective industry employees, even legislative staff and media. Different constituencies often are searching for the same information, but approach their world differently - so much of the destination content is the same, just packaged differently with multiple access "doors."

For example the main content navigation is direct general in nature. The content offered through these paths applies to multiple audiences, tilting more toward those familiar with the industry.

ABOUT
LEARNING
CREDENTIALS
RESOURCES
CONNECT

THIRD LEVEL:
The subnavigation offers still another type of segmentation- each area is recognizable as common to most any trade organization:
Events
Laws & Advocacy
Volunteering
Marketing.

FOURTH LEVEL:
For users seeking a quick path to a web site home for their constituency, the site also repeats some of that content AND supplements it with more targeted door labels under "Find Your Place" for the three primary industry constituencies:

-Associations (https://cai-nc.org/community-leadership/)
-Professional Managers (https://cai-nc.org/professional-management/)
-Business Partners (https://cai-nc.org/business-partners/)

IN ADDITION:
Mobile access was a top priority – not just for information access but also transactional. Most of our visitor actual interactions involve events registrations and sponsorship orders, so the new back-end application for all e-commerce had to seamlessly flow into easy-to-use responsive design for multiple devices.

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)

The site was launched at the calendar year's peak visibility and interactivity with our members: Annual Conference season. We wanted members to experience as soon as possible a new functionality that had been a singularly critical criterion in our selection of GrowthZone as our new AMS and website host.

That critical functionality goal was the ability to automatically charge correct member/nonmember pricing for all respective names in a group event registration.

With this new website feature, anyone at a management firm can simply select the names of an unlimited number of their colleagues from a pulldown, and pay the correct individual prices in one transaction.

To most people this might sound like a common practice. And it is in other environments but not for a CAI chapter. That's because most software applications operate on a presumed membership linkage between people and their companies. That linkage does not exist at all for CAI management companies and their employees. A CAI member management company can hold a corporate membership with all, none (except for the CEO), or just some of their employee managers holding a personal membership. The company's member number is unrelated to any other person's member number.

Thus, most software applications can see no financial tie between an employer and a manager, and therefore cannot present them as a list with mixed member statuses because they are independent relationships.

Our heavy hitter management companies complained for years about this. Most of them pay 100% of their managers' registration for an approved education event. They wanted to be able to task one person with registering say 15 managers for an event, and pay one total based on each person's member status. Prior to the new site, there was no way to accommodate that.

Our choices were limited to allowing one of the follow systemwide:
A- "Registrant" registering each colleague in a separate transaction. This required the assigned "registrant" signing in separately as each colleague in order to get the correct price per person – which meant the person having to procure and store all their managers' website passwords. Very unpopular all around.
B- Registering them all at the member rate, since the system again could not recognize the individuals' member status. This meant the company was undercharged. Some chapters say they do operate this way, and let the income difference go. The NC chapter wasn't comfortable with "leaving this money on the table." However in order to recover the difference chapter staff would have had to identify the "undercharged" registrations and chase the payment. Inefficient use of staff time and poor member relations.
C- Registering them all at the higher nonmember/guest rate, again since the system could not recognize the individuals' member status. This meant the total amount was too high, and the company overpaid. Some chapters say they do operate this way. Our chapter staff however went the extra mile after each event and analyzed each registration from each management company and then refunded that difference. This was the approach our chapter had taken for years. Confusing for members and very inefficient for staff.

A primary objective for the new website system was to offer an entire new way forward. At Annual Conference time in 2024 we were thrilled to launch the new ability for the registrant to simply select the names of an unlimited number of their colleagues from a pulldown, and pay the correct individual prices in one transaction per visit!

Provide quantifiable data supporting the rationale for success. Include why this data is significant. (20pts)

From the standpoints of member relations, staff efficiency and time saved for everyone all around, the new site has been a home run all around. We're not really able to build comparison metrics on site usage, due to limiting factors with the old AMS/site host. However an early different kind of indicator has been very key in terms of management company annual sponsor renewals.

Here's why: we tailored member communications about the new website by category. While the above major new e-commerce feature benefits management companies most directly, each of our other primary constituent groups also are enjoying new features aimed at them. However as our chapter strategic plan emphasizes, management company values are the top of the industry food chain. So we went to great lengths to personally introduce the new registration system above to the top contact at each significant/sizable company. This meant many hours of phone calls but it paid off in spades. This approach provided a unique opportunity to clearly demonstrate how highly CAI values each company's buy-in to the organization and the chapter. These conversations also engendered greater confidence in all other areas of the unfamiliar new site. And of course any time spent with management company senior leaders in casual positive business conversation is gold.

Most gratifying from a metrics standpoint however was the 100% renewal rate in management company annual sponsors during our fall 2024 campaign. This major annual revenue source tends to fluctuate more than business partner annual sponsorships, and to see not only the 100% renewal rate was even more significant since we also raised their sponsor prices this year. In addition, three management companies also upgraded to a higher tier.

More specifically tied to the new group registration feature, we also saw a 3% increase in the average number of manager attendees per management company at our 2024 Annual Conference. We expect this trend to continue now that the new site has made the entire experience much smoother ad faster.

What are your plans to maintain the momentum of this program moving forward? (20 pts)

Looking ahead we anticipate in 2025:

Building out the ability for management companies to easily pay directly for selected board members to attend chapter education events. Several of our larger companies have asked about this- they want to be able to proactively register individual clients and pay the correct member rate for each one. For example, at our February 2025 "HOA Leader 101" event webinar, one management company wanted to register 69 individual client homeowners. This year staff ended up doing this for them manually- but next year we plan for any company to be able to add their clients' names to their company pulldown and register them at automatic correct member/non-member pricing.

For 2026, we see the same type functionality being extended to business partners. Several of these firms are interested in buying event registrations for their manager customers, again at automatic correct member/non-member pricing.

Also for 2025-26:
Chapter Board of Directors dashboard: the new site has allowed us to envision including in the BOD portal a customized set of key metrics just for Board eyes, with data presented in easy to consume graphics form.
Volunteer group collaboration platforms beyond GoogleDocs
A new kind of LAC portal, fostering a greater sense of integration between the NC chapter and the NC LAC.

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?

fileUpload1

No File Uploaded

alias2f454e441e764267a13df2b44353f623

No File Uploaded

Would you like to share a link?

www.cai-nc.org (http://www.cai-nc.org)