



Strategic Plan

CAI – OREGON CHAPTER

Managing the Present. Creating the Future.

September 9, 2016

Version 1.0

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“You’ve got to think about big things while you’re doing small things, so that all the small things go in the right direction.”

—*Alvin Toffler*

“Good business leaders create a vision, articulate the vision, passionately own the vision, and relentlessly drive it to completion.”

—*Jack Welch*

CAI - Oregon Strategic Plan

1. Purpose

The purpose of this document is to provide the Oregon Chapter of CAI (CAI-Oregon) with a roadmap in creating the future.

This document is focused on the strategy – our long-term goals, vision, and conceptual direction. It is not the Operating Plan. What is the difference?

STRATEGIC PLAN (Sets Direction. Stays Consistent)	OPERATING PLAN (Transforms Strategy into Action. Is adjusted)
Long Term: 3 to 5 years (or more)	Short Term: 6 months to 1 year (or less)
Has goals: Statement of general direction of CAI-Oregon. Not measured as stated.	Has objectives: Manageable and measured. Supports the goals.
Produces fundamental decisions and actions that shape and guide what CAI-Oregon is, who it serves, what it does, and why it does it, with a focus on the future.	Produces work, projects, activities that support these decisions, with focus on the present.
Sets priorities to work towards a common goal	Generates results for each priority, measures progress and outcomes.
Determined by the Board of Directors	Work performed by the Executive Director, Committees, and other Volunteers*

*The way the team at CAI-Oregon implements the strategy should continually be adjusted (through short-term objectives) to position us to take advantage of the current economic environment, continue to grow, and to better serve our members.

This is an evolving document. Development will occur over time. The Strategic Plan is designed to be actively used as a reference document to maintain focus, direction, and to on-board new volunteers and staff.

This document should be reviewed annually as a team with the CAI-Oregon Board of Directors and the Executive Director, and make necessary improvements. Conducting a business planning session every year ensures that CAI-Oregon stays “on course” with its strategy, measures its success with the completion of short-term objectives, and sets new short-term objectives to achieve its strategic goals.

2. Introduction – CAI and CAI-Oregon Chapter

ABOUT CAI www.caionline.org

Founded in 1973, CAI and its U.S. and international chapters provide information, education and resources to the homeowner leaders and professionals who govern and manage community associations, condominium communities and cooperatives.

CAI's 33,000-plus members include community association board members, other homeowner leaders, community managers, association management firms and other professionals who support common-interest communities.

CAI serves associations by:

- Advancing excellence through seminars, workshops, conferences, tradeshow and education programs
- Publishing the largest collection of resources available on community association management and governance
- Advocating on behalf of community associations and their residents before legislatures, regulatory bodies and the courts
- Conducting research and serving as an international clearinghouse for information, innovations and best practices
- Being a platform and Resource Center for association communities to network and share experiences

CAI believes community associations should strive to exceed the expectations of their residents. Our mission is to inspire professionalism, effective leadership and responsible citizenship, ideals that are reflected in communities that are preferred places to call home.

ABOUT CAI-OREGON www.caioregon.org

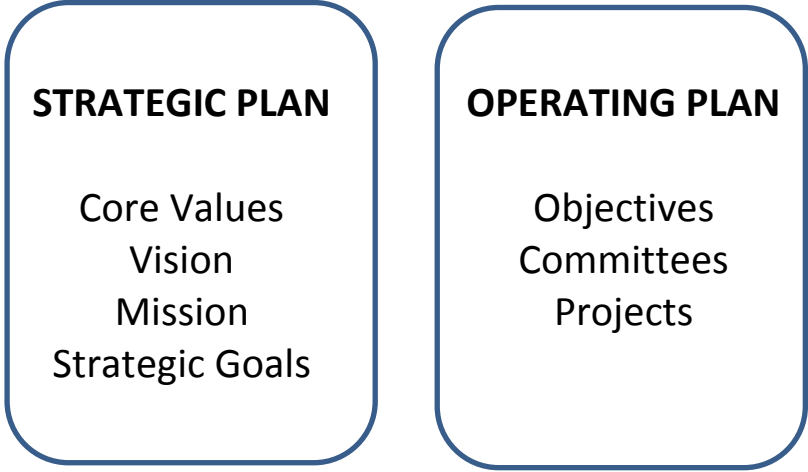
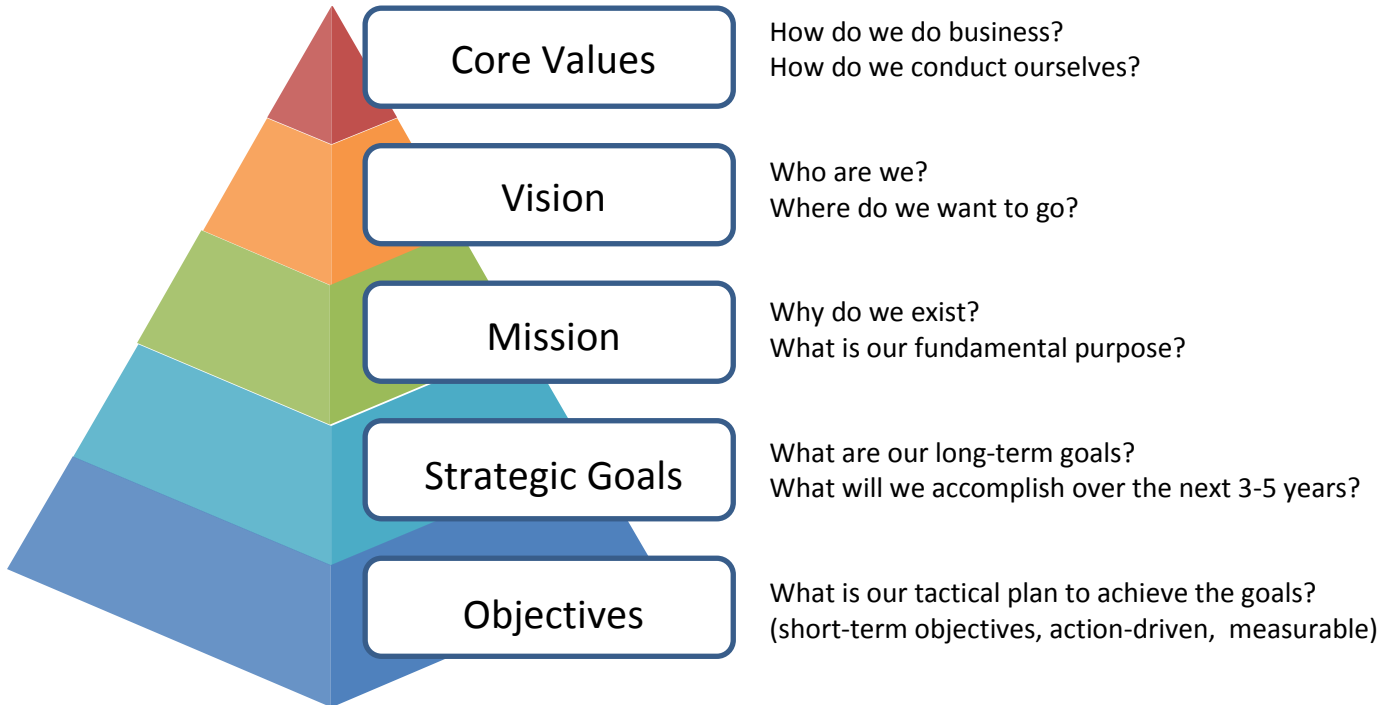
Chartered In 1980, the Oregon Chapter of CAI (CAI-Oregon) serves community associations, business partners and community managers throughout the State of Oregon.

Being an active chapter, CAI-Oregon has received numerous national awards for its innovative programs and high-quality services to its members.

Chapter benefits include:


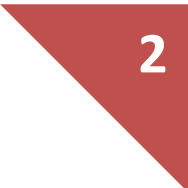


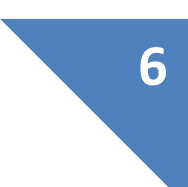

- **Information and Resources** – Local magazine, website, social media, e-news, and membership directory that keeps members up-to-date on news, information and issues affecting community associations at the local level.
- **Educational Opportunities** – For people living and working in community associations... board members, homeowners, community managers, professionals and service providers. Conducts alternative education formats and various times to fit member needs. Members stay up-to-date with local education programs.
- **Networking Opportunities** – Chapter luncheons, conferences, programs and social functions provide a great venue to meet and learn from experts in the industry, community manager colleagues, area community associations and service providers.
- **Legislative Activity** – Our state and local jurisdiction have laws, ordinances or programs affecting community associations in our area. Local legislative committees follow these activities and serve our members at the local level.

3. Strategic Planning Model



4. CAI-Oregon Core Values

The Core Values defines what CAI-Oregon stands for. It is what we believe in. It drives the way we think, decide, and act in doing business -- serving the members, the profession, and our stakeholders. Our Core Values are about operating within a set of fundamental, strategically sound beliefs within CAI-Oregon. They are established for how we should act. Not necessarily how we do act today.

- **1 COMMUNITY**
We believe in serving our community of stakeholders: members, potential members, business partners, volunteers, managers, homeowners, CAI-National.
- **2 ETHICS**
We believe in demonstrating ethical behaviour through honesty, integrity, trust and respect with all stakeholders.
- **3 ELEVATE**
We believe in promoting and elevating the organization – CAI and CAI-Oregon – and not promoting any individual interests.
- **4 MEMBER VALUE**
We believe in consistently providing value to the members through knowledge, networking and opportunities.
- **5 QUALITY**
We believe in doing things well ... and better – through quality, continuous improvement and a commitment to excellence.
- **6 ACCOUNTABILITY**
We believe in holding ourselves accountable – in our actions, decisions, responsibilities, and operations.
- **7 ADVOCACY**
We believe in advocating on behalf of community associations and their residents before legislatures, regulatory bodies and the courts.

5. CAI-Oregon Vision

VISION – Who are we? Where do we want to go?

The Vision inspires us to give our best. It shapes our understanding of why we work/volunteer for CAI-Oregon.



CAI-OREGON VISION STATEMENT:

The premier resource to help our members become successful leaders.

6. CAI-Oregon Mission

MISSION – Why do we exist? What is our fundamental purpose?

The Mission is our broad goal for which CAI-Oregon was founded. It defines the key success factor of CAI-Oregon.



CAI-OREGON MISSION STATEMENT:

To serve community associations by inspiring knowledge, building networks, and engaging volunteers.

7. Vision Formula

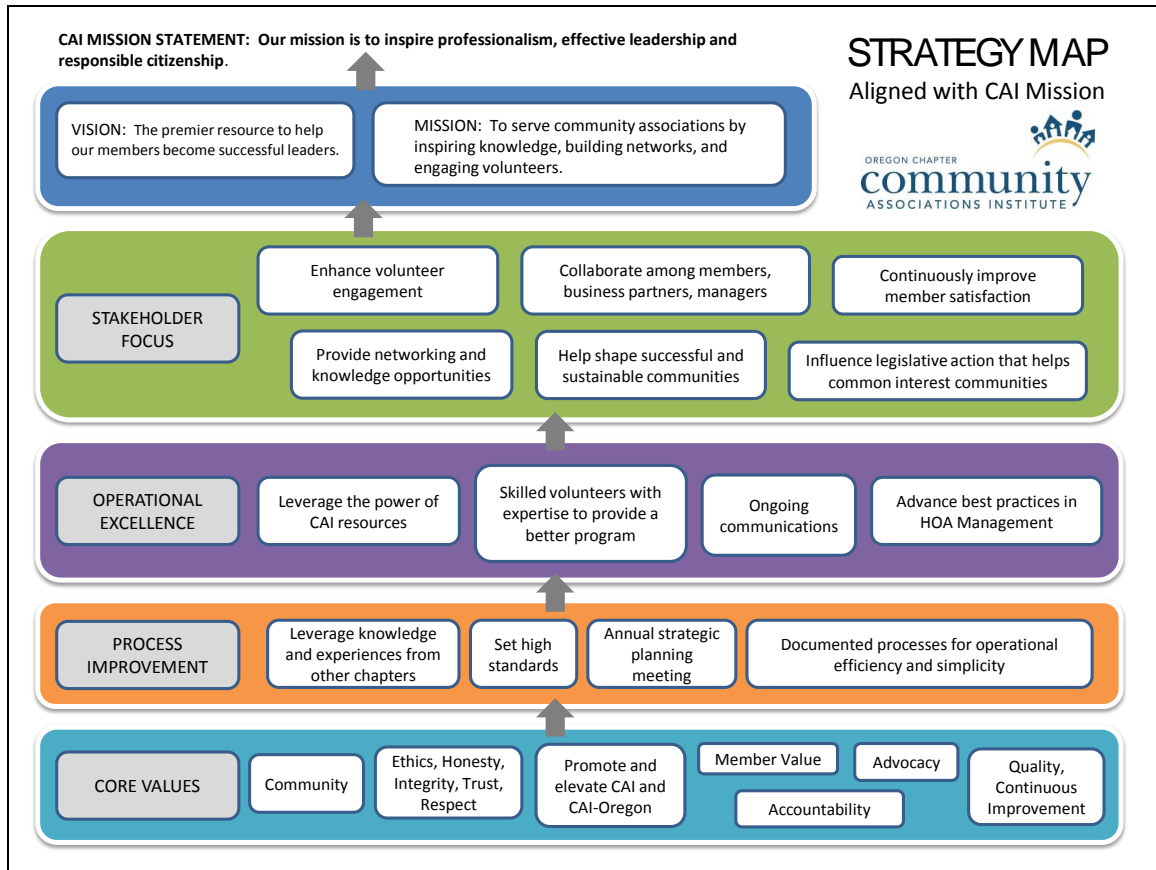


1. Community
2. Ethics
3. Elevate
4. Member Value
5. Quality
6. Accountability
7. Advocacy

To serve community associations by inspiring knowledge, building networks, and engaging volunteers.

The premier resource to help our members become successful leaders.

8. Strategy Map



An organization’s strategy is nothing more than the collection of intentional decisions a company makes to give itself the best chance to thrive and differentiate from competitors.

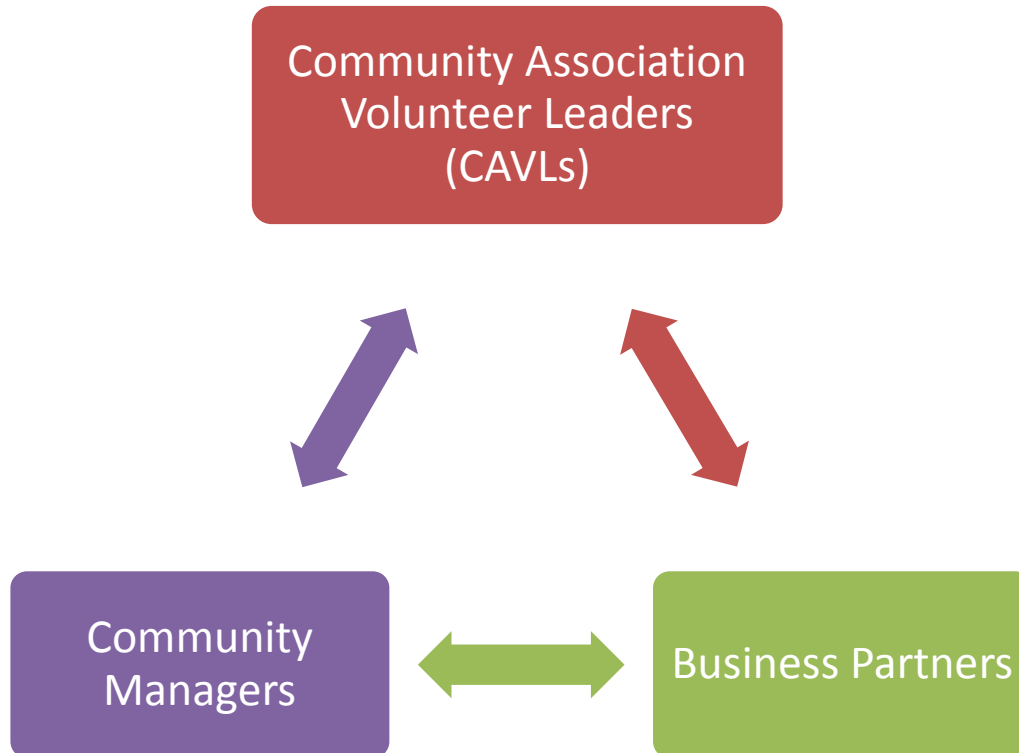
9. Strategic Goals

Timeline: 3-5 years

- **BRAND AWARENESS:** To be known nationally and locally, and create an impact that leads to successful communities.
- **GROWTH:** To grow membership, expand member-value, and increase member retention.
- **ENGAGEMENT:** To bring members together for knowledge sharing, networking, and contributing to CAI-Oregon through many volunteer opportunities.
- **EDUCATION:** To introduce alternative educational offerings and provide information and knowledge through a wide range of relevant topics.
- **LEADERSHIP:** To identify and maximize the strengths of our members, volunteers and chapter leaders in serving our stakeholders.
- **ADVOCACY:** To be a voice for community associations in developing statutory and case law.

Our strategic goals will be achieved through communication, collaboration, and creating a Call to Action.

10. Who do we serve?



Community Association Volunteer Leaders (CAVLs): Owners in a Community Association.

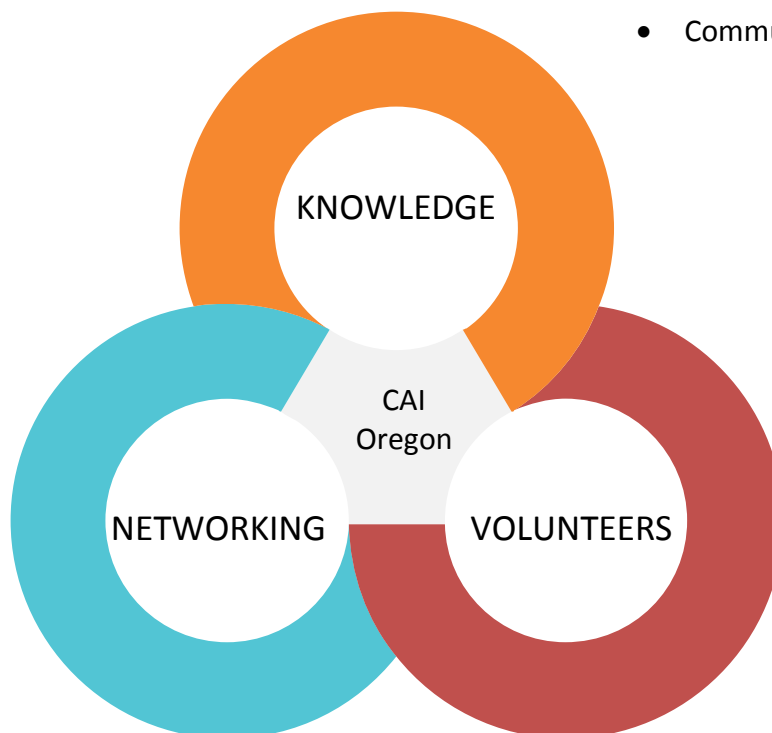
Business Partners: Companies or organizations who provide products, services or supplies for community associations. This group provides valuable resources to our members through advertising, sponsorship and being an integral part of CAI.

Community Managers: Companies or individuals specializing in community management services, with certified Association Managers, who provide knowledge and expertise to help community associations run more effectively.

11. Channels

KNOWLEDGE

- Education Events
- Luncheons
- Roundtables
- Tradeshows
- Speakers
- Annual Kick-off Event
- Community Bulletin Magazine



NETWORKING

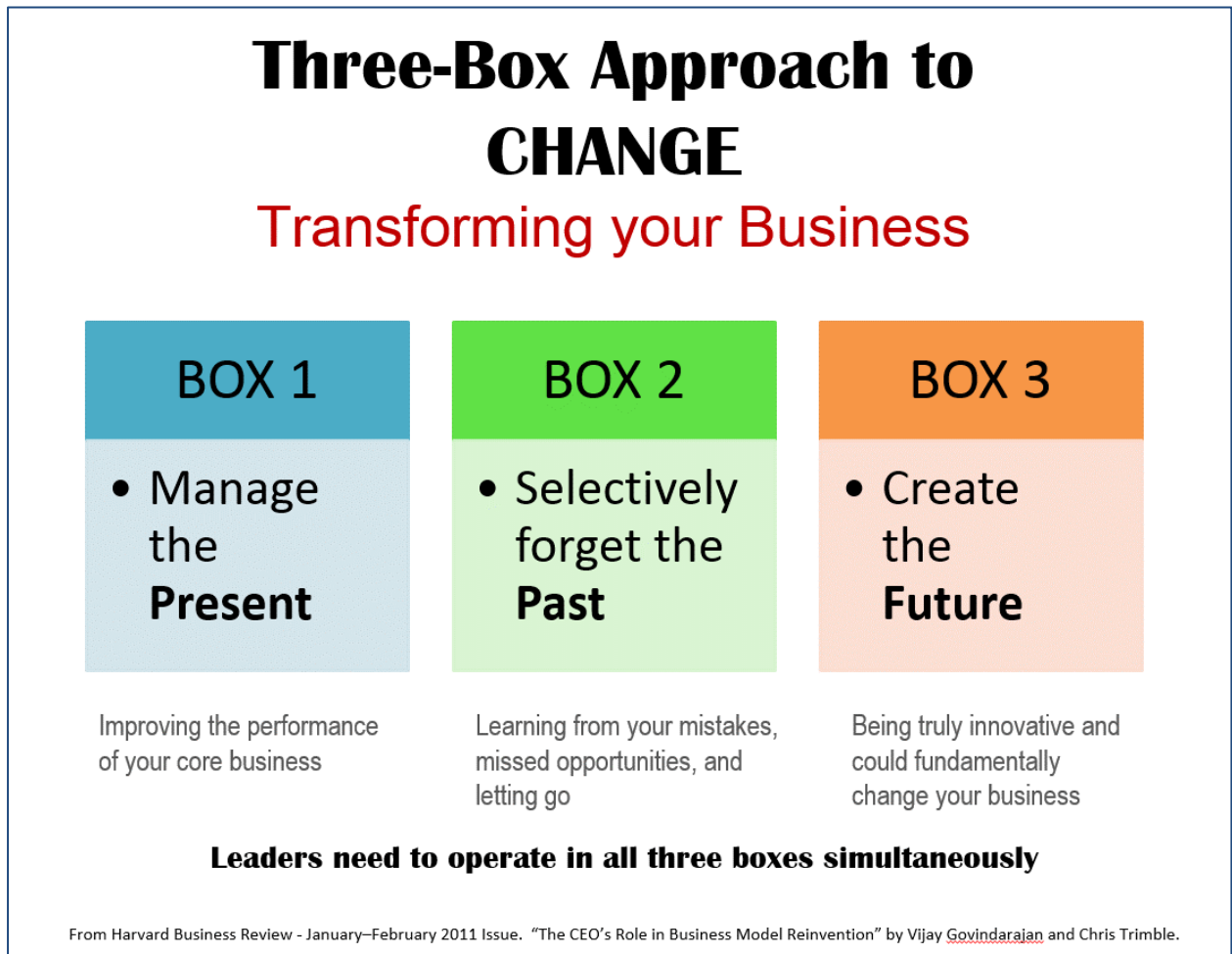
- Social Events
- Education Community
- Member Resources on Chapter Website

VOLUNTEERS

- Board of Directors
- Committees
- LAC
- Task Force / Special Projects
- Sponsorships
- Charity events

12. Three Box Approach to Business Transformation

Leaders need to operate in all three boxes simultaneously.



Link to an online version of this article:

<https://hbr.org/2011/01/the-ceos-role-in-business-model-reinvention>

Appendix A – Version Control

Strategic Plan	Approved by CAI-Oregon Board of Directors on:
Version 1.0	September 9, 2016