

**FOUNDATION FOR COMMUNITY ASSOCIATION RESEARCH
2011-2016 STRATEGIC PLAN
SUMMARY
APPROVED BY THE FOUNDATION BOARD OF DIRECTORS 5/3/2011**

INTRODUCTION

The Foundation for Community Association Research (“Foundation”) board of directors determined that the Foundation was in need of a comprehensive strategic plan to better define the **core purpose, core mission, values, strategies, goals and objectives.**

PROCESS OVERVIEW

In November 2010, the Foundation began a community-driven strategic planning process to set the goals and objectives of the organization for the next five years. A strategic plan working committee of Foundation board members and a diverse group of non-board members was appointed in December 2010 and served as the focal point for the planning process giving voice to the diversity of communities of the organization.

Through surveys, interviews and focus groups with Foundation leadership, CAI members, the CAI Board and industry representatives, an assessment was undertaken to gather the data needed to assess community knowledge of and attitudes toward the Foundation, and to identify the role of the Foundation in the ongoing development of the industry. Additionally, an organization audit and assessment was conducted to understand the current organizational operations and challenges to internal structures and systems.

Using the results of the assessment the Foundation leadership engaged in a critical discussion about the challenges to change facing the organization and commenced planning. As presented in the plan summary below, the Foundation can now clearly articulate the core ideology, plan strategies, and goals and objectives for the coming five years.

PLAN SUMMARY

Core Purpose

The Foundation for Community Association Research Initiates and Publishes Authoritative Research for Changing Communities.

Authoritative Research for Changing Communities: The core purpose of the Foundation recognizes that it provides the fuel for community leaders through its research in an ever-changing industry and environment, but does not seek to make the change directly itself. The Foundation is an integral part of changing communities and can take credit for effecting change. When volunteer leaders and the professionals who work with them have the highest-quality industry research and analysis available, healthy, vibrant and sustainable communities with effective and efficient association leadership can emerge and thrive.

Core Values

- ✓ **Excellence** – We strive continually to learn and improve with a shared commitment to quality, consistency, and accountability. Our actions are harmonious, logically connected and responsible.
- ✓ **Innovation** – We operate with a sense of possibility for the future and consistently strive to better our actions, programs, services and purpose by incorporating proven best practices and by setting the standard with creative new solutions.
- ✓ **Integrity** – We act in an honest, ethical, and trustworthy manner. We are accountable for unbiased, accurate information; consistent with our work and actions; and act with respect for all people.
- ✓ **Value** – Our service provides benefit to our community and is held in high repute. We focus our work on activities, programs, and services that maintain the highest return on investment for our communities.

Vision

The Foundation is the world leader and recognized research authority on common-interest communities – Its research and analysis is sought out by those working for community change.

The Foundation for Community Association Research envisions a world where people live, work and play in vibrant, comfortable, and sustainable communities with effective and efficient community associations ensuring this vision. While our primary area of authority is common-interest community, the Foundation spearheads and participates in collaborative research efforts with those whose sphere of influence intersects efforts for growing effective communities. The stakeholders (those working for community change) include but are not limited to the following: industry trade groups like Community Associations Institute - its chapters and Legislative Action Committees, National Association of Home Builders, National Association of Realtors, Urban Land Institute, and the College of Community Association Lawyers, etc; community association boards and homeowner board members; the Media; Federal, State, and local governments; and academic and research organizations.

Core Mission

The Foundation for Community Association Research provides quality research, expert analysis and insight into community trends, issues and operations to be used as resources by common-interest communities and the industry.

The Foundation accomplishes this mission by encouraging interdisciplinary research, scholarship and teaching of high quality in subjects relevant to common-interest communities

and by facilitating communication and joint ventures among business and nonprofit organizations, universities and colleges, professional associations, and local, state, and national government agencies that seek to foster curricular development and scholarly research on common-interest community issues.

Strategies

Focus on Becoming the Quality, Independent Research Engine for the Industry.

A shift in position in the coming years, the Foundation transitions to a research entity for a variety of “clients” from industries engaged in advancing vibrant, comfortable, and sustainable communities. In addition to CAI, the Foundation will engage other “clients” that it will serve by providing authoritative research. These could take the form of outright commissions or through joint ventures/collaborations for a common purpose. Fundamental to this, the Foundation concentrates on building a comprehensive and consistent research agenda and pipeline as the “think tank” of the industry and field. This occurs in two ways 1) proactively by assessing community needs in specific targeted areas of focus and prioritizing the research and analysis that would most benefit leaders, and 2) responding to requests by clients to conduct research that they have identified as beneficial to their work as indicated earlier in this section.

Gain Greater Financial, Structural and Brand Independence from CAI. The Foundation certainly recognizes that at this point it could and would not exist without CAI. Moreover, the Foundation will work towards enhancing this client/provider relationship and continuing it as a mainstay of its work and funding – seeing over the long-haul CAI being the primary “purchaser” of the Foundation’s “product” research and analysis. However, as the Foundation grows its “client base” to include others interested in its authoritative research, it could experience greater structural needs dedicated to the pursuit of research and analysis. To this end, the Foundation undertakes efforts gradually to put into place independent financial and structural functions to ensure its ability to attract and serve additional clients and to, of course, better serve CAI itself. The result being a gradual structuring and expanding of human resources, creating and positioning a more independent brand, and broadening and diversifying its funding base from the CAI member check-off box to commissions, joint ventures and charitable giving.

AFTERWORD

The Foundation will work hard to address the strategies outlined in the plan and will ensure that we not only maintain the momentum but also engage industry leaders and those working to affect change in common interest communities. We ask for your feedback and are interested in bringing together people who share our vision and values and who wish to see the Foundation as a world leader and recognized research organization contributing to the knowledge base of common-interest communities.