

III. GOALS AND OBJECTIVES

A. The value of members' properties will be increased by a measurable amount through strategic actions of MPHOA and Staff.

The value of any member's property can be significantly impacted by the programs, policies and actions of the Association and Staff. The unique Community Center facility and the 185 acres of Common Property are shared assets that can be made more attractive and more valuable to all residents. Imaginative and valuable programs, especially when supported by the dues structure, add value to residents. Real property values will directly reflect the value of these programs and assets. As stewards of the common assets, the Association and Staff will plan and implement the following objectives that will have a measurable positive impact on property values.

Objective 1- Implement the Common Property Master Plan.

Action Strategies:

1. MPHOA Staff and Common Property Committee will take responsibility for implementing strategies and periodic review to achieve the objective.
 - a. Staff and Committee will continue to review the eight Priority Tasks outlined in the Master Plan and develop an implementation plan based on the Committee's order of prioritization as follows:
 - 1) Invasive Species – Complete several invasive plan projects; post educational materials in airlock and on website
 - 2) Managed Grass Areas – Renovate small grass areas of Becket/Masaryk and Becket/Juarez. Renovate large grass areas (irrigation and alter turf) to include Nansen, Tanglewood, and Touchstone.
 - 3) Trail Signage – Work with the Common Property Committee to review and install park signage and review the trail signage system.
 - b. Trails/Pathways –Add pathway at Tanglewood Park. Budgetary requirements (including labor and expenses) over and above the general maintenance needed to implement the Master Plan will be identified and incorporated in the budget process by the Landscape Manager and Executive Director. Landscape Manager will work on restructuring the department and subbing out more landscaping tasks to build in greater efficiency.
 - c. Projects already in process will be continued per plan and may be identified as follows:
 - 1) Parks – A parks matrix, including Edith Gress, Guttman, Nansen Summit, Touchstone, Tanglewood, and Cellini Parks, has been developed and will be reviewed by the Common Property Committee. Proposed ratings of each park and needed actions, including pathway repair, irrigation, plantings, pruning, bark chips, lightening, signage, and additions/repairs to existing improvements, are among the items in the matrix to be reviewed.
 - a) Continue work in process to complete Nansen and Touchstone parks – turf maintenance and irrigation 1st quarter 2016, if not completed by 2015 Other items will be reviewed by the Committee and referred to the Board of Directors to develop further instructions for scheduling and implementation.
 - 2) Small and Large grass areas – will continue to be identified and removed per plan to reduce mowing and water consumption, and improve aesthetics.
 - 3) Tree Survey – will be worked on in house with greater use of software and identification of trees to be added.

- d. MPHOA Staff and Common Property Committee will identify other opportunities for Common Property improvements deemed necessary and incorporate them into the Common Property Master Plan, including:
 - 1) Implementation of the encroachment plan, including surveys, letter to homeowners, establishing agreements.
 - 2) Work with the Watershed Council to identify opportunities for grants.
 - 3) Explore the feasibility of adding a workout park, collaborating with Fitness Director.
 - 4) Explore development of the sitting area outside the northwest corner of the clubhouse into a more attractive, usable space.

Objective 2 - Continually develop the special asset of our Clubhouse (Community Center) programs including maintaining the quality and quantity of existing programs as well as offering more indoor and outdoor recreational, social, and cultural activities.

Action Strategies:

1. MPHOA Staff will take responsibility for developing strategies to implement the objective as follows:
 - a. Develop the role of the Clubhouse Committee to include involvement in the following: clubhouse programming (fitness, aquatics, youth, and social activities), policy and procedure review and development, and audits of the facilities.
 - b. Program Development – Fitness
 - 1) Continue to develop current programming through generating new marketing outlets including refer a friend discounts, twitter, live website feeds, and direct emails to populations.
 - 2) Complete quarterly member surveys of fitness classes offered to include personal training, group exercise, and quality of programming. Increase survey response by offering a chance to win prizes and market and promote surveys through new avenues.
 - 3) Expand programming to include more branded classes. Sample classes to be potentially offered or continued to be offered include: Monthly Health Themes, Bosu Step Class, Aqua Yoga, Strength Classes, Silver Sneakers, Cardio Tennis, NEIA, Outdoor Fitness, Body Pump, and Tribe.
 - 4) Promote Personal Training by developing the marketing program to include exploring the addition of a Point-of-Service downstairs, generating monthly reports of new joins, get full team buy-in to developing their business (creating a scaled employee incentive system, offer monthly sales goals).
 - 5) Offer Health and Well Fair every January.
 - 6) Promote new class offerings by offering “Launch Classes” to include limited number of participants, 30 minute taster classes so participants can experience the class, 3-4 classes per day, and chances to win prizes. After the completion of launch week, classes will run at a pre-set time.
 - 7) Increase member sales and effectiveness of memberships by creating electronic membership contacts, electronic guest tracking, and commission based incentives for cold calling members.
 - 8) Set up Mountain Park Specialty Club for training for specific fitness events, i.e. specific running events, walking events.
 - 9) Continue system development for inventorying and assuring equipment accessibility in the Weight/Cardio Rooms and Studios. Replace and/or add equipment as allocated in the budget. Evaluate vendors providing preventive maintenance and equipment replacement services.
 - 10) Increase usage of all aspects of the fitness center – explore and implement new membership software system, explore adding a pro shop, explore adding an incentive program for members (i.e. point system for engaging in fitness activities).
 - 11) Develop awareness in the community through partnerships with various organizations and local business.

- 12) Partner with Special Events to offer various sports event parties i.e. March Madness and Super Bowl.

b. Program Development – Aquatics

- 1) Maintain the highest level of CDC, State and MPHOA rules, safety, and regulations according to State, Red Cross, and Manufacturers Recommendations.
 - a) Ensure that safety equipment is stored, maintained, and used in accordance with State and Red Cross through nightly lifeguard inspections and monthly survey.
 - b) Enforce and educate all aquatics rules, regulations, and policies to members through continually updated signage, lifeguards, and an annual Safety Fair event.
 - c) Stay current with all training and certification materials, participate in in-services, and continuing education (monthly PAC meeting and Red Cross
 - d) Work with FHA, equipment manufacturers, and liability insurance agent to assure all rules meeting compliance and safety standards.
- 2) Ensure adequate staffing and development to meet programming demands.
 - a) Determine staffing levels needed for changes and implement the staffing plan.
 - b) Offer in-house certification programs – Lifeguard, Water Safety Instructor. Offer First Aid and CPR/AED on a community and employee level.
 - c) Partner with other organizations to recruit staff or candidates for the certification programs as well as develop programming, safety standards and staff.
 - d) Promote criteria and opportunities for advancement of Lifeguards – Lifeguard I, II, and Lead.
 - e) Continue Aquatic Staff training including formal in-service schedule, 1:1 training, drills, monthly physical standards, and team guided evaluation.
 - f) Continue maintenance of the lifeguard handbook and assure staff use.
- 3) Increase youth aquatics program via group lessons through Red Cross, Increase private and semi-private lessons, community water safety awareness program, and swim meets.
- 4) Develop, educate and implement on the Red Cross Swim Lessons through increasing staff WSI certifications.
- 5) Increase adult aquatics program thorough adding evening water exercise classes, increasing private and semi-private lessons, adding adult swim clinics, increasing the masters swim program, and hosting more outside certifications.
- 6) Offer the following new events/activities in coordination with fitness department: indoor triathlon training, yearly Health and Safety Fair, bi-annual swim meets for youth and masters.

c. Program Development – KidZone

- 1) Develop and implement programming through a partnership between Special Events, Playschool, Fitness, Aquatics, and outside companies (home schooling and non-profit organizations).
- 2) Review current programming and further develop as needed to include: Kids Night Out, birthday parties, summer/holiday camps, youth group exercise program (schedule total of 5 classes), Happy Feet (soccer), Shining Star (drama), monthly children’s “drop off” activity, and all other programs currently running.
- 3) Increase overall management of the KidZone Department by a) increasing marketing outlets and resources (email blasts, community networking, “taster” days, KidZone spotlight event, partnerships with schools and home schooling), and b) Partnering with outside organizations to strengthen programming including schools, home schooling, outside sports organizations, and other health clubs.
- 4) Increase brand identification for KidZone to have more meaning in the community.
- 5) Offer a yearly Kid’s Fun Fair.
- 6) Explore feasibility of taking over Playschool Express as part of KidZone.

d. Program Development – Special Events

- 1) Continue and further develop past popular events and programming including: Bridal Show, Volunteer Brunch, “Art in Mt. Park”, 4th of July Parade, and Holiday Bazaar.
 - 2) Partner with Playschool and KidZone to continue to offer the Halloween Party, Holiday Event, Family Movie Night, and Easter Egg Hunt to all MPHOA children.
 - 3) Expand Special Event Programming with a focus on social activities by partnering with local businesses and recreation centers to include a wide range of attractive events i.e. Mahjong, Artist’s Reception, Vine Gogh, and Nature Walks.
 - 4) Partner with the Clubhouse Committee and Social Groups to assist with ideas and/or provide volunteers for other clubhouse activities.
 - 5) Partner with local musicians to promote and offer the Mt. Park Concert Series. This will be a 4-5 concert series of various music types and funded by a combination of ticket sales and local sponsorship.
 - 6) Offer Member Sports night with discounted pricing to key sports events, e.g., Blazers, Winterhawks as well as offer March Madness and Super Bowl parties at the Clubhouse.
 - 7) Increase events hall rentals by attending outside bridal shows as well as networking with event planning companies and other event venues in the community.
 - 8) Promote and expand Birthday Party offerings: offer birthday party packages, partner with outside businesses, and offer game room and sports court for older children.
- e. Program Development – Playschool
- 1) Continue and further develop past popular Playschool annual parties and events to include: Mother’s Day Tea, Father’s Day Picnic, Back-to-School, Holiday Music, Lunch on the Mayflower, Graduation, and Overnight Campout
 - 2) Partner with Special Events to continue the Halloween Party, Haunted House, Holiday Event, and Easter Egg Hunt to all MPHOA children. Expand the programming to offer an end-of-year art show.
 - 3) Partner with Fitness and KidZone to continue to offer, Kids’ Night Out, soccer, yoga, and swimming. Bring back tumbling and add Creative Movement, Pre-school involvement in All Sports Program, and community activities to include Rock/Socks Event and Lake Oswego Art Fair and Kid’s Day.
 - 4) Explore the feasibility of having Playschool Express be managed by KidZone.
 - 5) Participate in Oregon’s Rating & Improvement System (QRIS) program to improve curriculum, including a professional evaluation and recognition program for teachers.
 - 6) Market Playschool through placing children’s art in local medical facilities and businesses.
 - 7) Explore the ability to offer playschool clients the ability to pay tuition and gymnastics on-line.
 - 8) Explore the feasibility of developing and opening the lower playground area to MPHOA members not enrolled in Playschool.
- f. Marketing Programming
- 1) Refine current marketing techniques of posting articles and/or schedules in the Parkways newsletter, the reader Board in the Clubhouse reception area, bulletin boards, the Clubhouse entrance airlock, e-mail blasts, and new website to create a more dynamic visibility. Explore adding a reader board to the cardio/weight room.
 - 2) Continue an organized approach to proactively track and market events:
 - a) Meet with key department heads (Special Events, Playschool, Aquatics/Fitness, and Compliance) requiring marketing support to determine 2016 advertising needs.
 - b) Set up an online marketing calendar of activities for the year in SharePoint; revisit quarterly and firm up scheduling for each event.
 - c) Schedule one-on-one marketing meeting with at least the following staff: Special Events, Fitness/Aquatics/KidZone, and Playschool Department Heads. Work with website developer to refine the website calendar to be more intuitive.
 - 3) Continue in-house marketing to include:

- Consistently and strategically use promotional table tents in Clubhouse areas i.e. Wi-Fi Bar, Lupine Room, Front Desk, and Fitness Desk to promote events and activities.
- 4) Strategically use the Clubhouse's entrance airlock to create more excitement and visibility for activities to include monthly themes, member photo collages, and/or educational materials. Airlock themes will be planned during 1:1 meetings and implemented according to plan at least every other month.
 - 5) Continue to work with schools and local papers to expand marketing to non-members in an effort to grow events and activities that need greater attendance. Work with Lake Oswego Review reporter to cover select events and music series.
 - 6) Continue the use of social media including Facebook, YouTube, and Twitter. Focus on making more interactive with contests, polls, questions, and videos.
 - 7) Work with Dorey Design to create a more exciting email blast template.
 - 8) Focus on incorporating Home Care and Landscape in marketing efforts to provide more education to homeowners.

*Objective 3 – Board Liaison will continue to work with the City of Lake Oswego and will actively pursue lobbying efforts to benefit Mountain Park.

Action Strategies:

1. Charge the Liaison(s) to explore appropriateness of liaisons with other entities such as the Clackamas County and the City of Portland.
2. Schedule a joint meeting of the MPHQA Board with the City Council annually.
3. Prepare a strategic agenda of issues to be addressed by the City Council and update annually.

*Objective 4 – Increase the awareness of, and compliance with, a more robust Homeowner Home Care Program.

Action Strategies:

1. Continue to focus on a proactive Home Care Program by continue monthly Home Care Sub-Committee meetings and routinely updating the Home Care Plan progress tracking tool. Staff will continue to work with MPHQA Board and Committees to provide greater educational and resource opportunities for members to include:
 - a. Contractor's List posted to the website, which is maintained and updated on an ongoing basis. Contractors will offer MPHQA members a preferred discount.
 - b. Work with the Architectural Committee to update Architectural Policies and Procedures with accurate pre-approved materials list.
2. Distribute thank you letters to homeowners who meet established criteria for maintenance of their property on an annual basis.
3. Identify untenanted homes and implement cleanup as needed to ensure the property meets MPHQA standards.
4. Continue routine drive and walk arounds such that all home care violations are documented each month. Track violations and progress in achieving resolution. Informally address violations (email, phone call) initially, followed by formal letters as needed. Work with the Home Care Committee to implement the process of fining violators.
5. Continue to develop the new homeowner orientation program for new homeowners. Staff will take the lead as follows:
 - a. Continue to make the Welcome Packet available on the website and in person as needed to new homeowner to include: CC&R's, Clubhouse Rules, Compliance Policy, Architectural Guidelines, CPWR policy & form, Emergency #'s, Contractors List, ACH Program, Assessment Schedule& Calendar, and Key Facts document.
 - b. Explore ways to share Welcome Packet information with Realtors.
 - c. Send letters to all new homeowners within 30 days of moving into Mt. Park Complete, offering new homeowner orientation on an individual basis Ensure that the Home Care program is given appropriate visibility.

6. Marketing staff will work with CC&R Director to assure the program is marketed through the standard marketing avenues to include: newsletter, e-mail blast, marketing on in-house reader board, advertising in the Clubhouse entry airlock, and a new home page dedicated to the Home Care program on the new website.
 - a. Rotate subjects and do a featured educational display several times per year.
 - b. Post Home Care tips and news.
 - c. Post criteria for maintaining siding, roofs, sports equipment, and landscaping.
 - d. Explore hosting a Contractor Fair in March or April. Assure a table is set up at the Contractor Fair to include Home Care Committee, Architectural Committee, Clubhouse Committee and Member Services Staff representation.
 - e. Assist Landscaping staff in providing handouts and education on invasive species and natural habitat per the Common Property Master plan.
 - f. Attend sub-HOA meetings as requested to provide education as needed and more visibility of the CC&R department.

Objective 5 – MPHOA will evaluate the potential for more meaningful interactions with businesses and employees within our commercial enclaves.

Action Strategies:

1. To be addressed by the Board in the next 1-2 years.
2. Staff will continue to invite local business involvement in social events and fairs.

B. MPHOA will encourage active participation in the governance structure (Boards, Committees, and Program-related Sub-Committees by all Community members, and facilitate access to our community by all.

The strength and effectiveness of the Association, and its ability to serve the Mountain Park Community, depends upon volunteer leaders. The following objectives will be planned and implemented to expand the impact of volunteer leadership and to increase the number of residents who participate in Association governance.

Objective 1- MPHOA will encourage and support the development of program-related activity committees for the organization.

Action Strategies:

1. Staff will continue to provide support and facilitate the following committees: Architectural, Home Care, Clubhouse, Common Property, Finance, and Reserves.

Objective 2 – MPHOA will establish and support a formal program with Apartment Owners to facilitate communication and to provide a formal link to our governance.

Action Strategies:

1. Board will put this on hold until Objective 2 is rolled out.
2. Board and Staff will focus on individual apartment owners and ensure that renters are receiving support from MPHOA Staff.
3. Staff will continue to send letters to apartment managers detailing the steps needed to communicate apartment turnover to MPHOA in order to assure new tenants are granted clubhouse user rights as quickly as possible. Unresponsive managers will be invited to a MPHOA Board of Directors meeting.
4. Staff will assure absentee owners are receiving communication.

Objective 3 – MPHOA will increase participation of all resident groups (renters, condo owners, and single family home owners) in our governance structure.

Action Strategies:

1. Staff and Board will continue to focus on opportunities to involve all groups in our Community's governance structure.

2. Increase advertisement of Board Meetings and Committee Meetings to enhance communication and involvement of homeowners.

C. MPHOA will establish and maintain an ongoing process to identify, plan and implement programs to improve efficiency, safety, and sustainability of our Community.

The Association's leaders and the Staff have a responsibility to operate the Association and its business in a safe and efficient manner. In addition to the normal attention to safety, efficiency and sustainability, the following two objectives will significantly improve the operations of the Association.

Objective 1 – MPHOA will continue to implement the new yard debris program and assure that it is a safe, economical and sustainable alternative.

Action Strategies:

1. Landscape Manager and Executive Director will schedule and attend a meeting with the Yard Debris Task Force to discuss the status of the program i.e. what is going well, what needs to change, and next steps.
2. Explore feasibility to eliminate the bag pick up with the next year or two.
3. Monitor and assess the effectiveness of the program.

Objective 2 – The Board will confirm the priority of Staff training and compliance with fire, emergency, health and safety programs within our Community.

Action Strategies (currently underway and being implemented by Executive Director and Staff):

1. Continue to ensure that all staff as required has current CPR/AED certification.
 - a. Continue to implement the orientation check sheet and CPR certification tracking system.
 - b. Schedule at least bi-annual CPR/AED and First Aid classes on-site with in-house staff and/or contracted staff.
 - c. Continue to offer free CPR/CPR and first aid classes to full-time Staff and all Playschool, Events, aquatics staff, and fitness staff working more than 10 hours per week, exclusively for MPHOA.
 - d. Develop a post trauma plan to support staff experiencing a traumatic event on site.
2. Assure all Staff is trained on the Emergency Action Plan during orientation and annually at a minimum.
 - a. Update Emergency Action Plan as needed, ensuring Clubhouse, Playschool, Aquatics, and Landscape plans are consistently updated.
 - b. All Staff will receive training on the Emergency Action during orientation and annually by their supervisor or designee. Training will be documented as well as tracked on the new hire check sheet.
 - c. Manager on Duty designees will receive a more intensive training to include weekly topic reviews at the Manager on Duty meetings.
 - d. Develop tighter and consistent standards for completing fire drills. Request input from the fire department.
 - e. A new vehicle training program for all staff driving on the behalf of MPHOA will be implemented first quarter 2016.
 - f. The earthquake emergency procedures will be reviewed and enhanced by first quarter 2016 after completing a Seismic Evaluation completed by an outside consultant.
3. Continue monthly Safety Committee Meetings to include a representative from each department.
 - a. Continue to track and review all Staff and member incidents per the “MPHOA Incident/Injury Log”.

D. Mountain Park will be widely recognized as the best community of its type in the Pacific Northwest.

Mountain Park is a unique and wonderful community. The attractiveness of this place and its residents is of great value to us all and we should be proud and open in describing who and what we are. The following objectives will enhance the positive visibility of our community and its attributes.

Objective 1 – The MPHOA website will be streamlined to enhance appearance, with more abundant resources for members, and a seamless accessibility from all devices.

1. Staff will work with the website design company to make the website more intuitive, user friendly, include more pictures and videos, and upgrade electronic forms.
2. Staff will work with the website design company, bank, and our other outside companies to explore the feasibility of adding on line payment capabilities for HOA dues, clubhouse activities, social events, and Playschool tuition.
3. Staff will work with the website design company and other outside companies to explore the feasibility of addition a weather station and camera to the website.

Objective 2 – MPHOA will develop a Professional Marketing/Public Relations Program designed to economically increase public recognition of our Community.

1. Create a positive image in the community through program development in Fitness, Aquatics, Kidzone, Events, and Playschool.
2. Board will use social connections to increase recognition.
3. Pursue awards or special credentialing in each specific program as well as CAI and other organizational awards.
4. Work with website design group to receive a social review site rating.
5. Establish a realtor focus group to determine realtor needs in marketing homes in Mt. Park.

Objective 3 – A task force to identify historical, present and future attributes of the Community will be created.

1. Staff will work with a Task Force to focus on our 50 year anniversary in 2018.

Other Strategic Planning Initiatives

The Executive Director will lead a strategic planning process with management staff. The strategic planning process will address issues from this Strategic Plan and will specifically address the following additional topics:

A. Customer Service

1. Staff will continue to implement a company-wide customer service program.
 - a. Leadership team will review and update standards as needed on an annual basis.
 - b. Training of all Staff will initially occur upon orientation and thereafter at least annually. Executive Director will train Leadership Team and managers will train their staff.
 - c. Explore feasibility of purchasing a Customer Service Software solution to assist training.
 - d. Reinforcement of standards will occur through 1:1's and in-services.

B. Accountability and Tracking

1. An annual Performance Planning and Review process will be implemented for all Staff prior to the end of the year.
2. Department Heads will develop their annual departmental budget with the Executive Director in the budgeting process.
3. The Leadership Team will track and report their performance on a monthly basis via the KPI report and financial review to the Executive Director. Each team member will receive their department financial statement and KPI report.
4. The Executive Director will provide and offer department heads a checkbook declining balance system to better track and monitor expenditures for their departments.
5. The Executive Director will provide a Financial Report to the Board on a monthly basis.

C. Strategies to Reduce Accounts Receivable, including campaigns to promote electronic payment.

1. Staff will continue to promote ACH through education and targeting the slow and late payers.
 - a. Consistent wording on all ACH promotional materials will be reviewed and updated.
 - b. Semi-annual campaigns (June and December) will continued to be offered to sell the value of using ACH.
 - c. ACH information and promotional materials will be included in new homeowner packets.
 - d. ACH will be promoted via newsletter articles (monthly insert with expanded article in November and May), bill inserts (December and June), ACH brochures in the airlock, and other ongoing education.
 - e. Focus ACH marketing on those that pay late. Include mailer in each bill.

2. Staff will work with Board and Attorney to develop and adopt a revised Resolution of Collection of Unpaid charges. Key points will include:
 - a. Consider assessments delinquent after 30 days versus 60.
 - b. Late fee assessment for accounts past due more than 30 days
3. Staff will continue the collection process to include collection letters, liens, and collection agency support. Letters will be changed to assess liens by the 2nd letter for chronic late payers.
4. Staff will meet with Vial Fotheringham annually or as needed to review the collection process and/strategies for collecting delinquent accounts.
5. Accounts Receivable will be reviewed semi-annually and as needed by the Staff and Finance Committee.
6. The Finance Committee will identify long-term versus short term receivables at least annually.
7. Explore the feasibility of offering alternative forms of payment, including credit card payment (with added fee), e-checks, and other forms of electronic payment. Look at other banks if First Citizens cannot provide electronic payments.
8. Increase involvement of the Accounting Clerk in the collection process.

D. Expansion of IT services

1. Review, manage and implement IT structure, including software and hardware. Computers will be replaced as allocated in the 2016 Reserves Budgeting Process.

E. Member Services Software - improvement of functionality, ease of use, and enhances services

1. Staff will transition and begin implementing new software no later than 1st quarter 2016.
 - a. Staff will work with the Board to finalize any approvals needed to contact with a new software vendor if not done so prior to 2016.
 - b. Staff will work with IT Company and new software vendor to export data from Abacus to the software.
 - c. Set up and implement training.
 - d. Educate members about the features and benefits of the new system.
 - e. Update Member Services Standards of Operations Manual to include new software.

F. Accounting Department – increase efficiencies

1. Evaluate the current accounting software and seek greater efficiencies.
 - a. Work with IT Consultants to seek solutions for TOPS issues.
 - b. Research feasibility of using QuickBooks vs. TOPS for Accounts Receivable processing.
 - c. Review HR software and see if comparable or greater efficiencies can be achieved through QuickBooks.
2. Refine the Payroll process
 - a. Explore the feasibility of adding electronic time card capabilities through the new Member Services Software provider.
3. Research qualified and request proposals from qualified CPA firms no later than May 2016.

G. Leadership Training – Continue to develop the leadership team through a combination of in-house, outside consultant, and off-site trainings.

H. Facilities Maintenance – provide excellence in maintenance and housekeeping services in a safe, customer & employee focused, efficient, and sustainable manner.

1. Communication
 - a. Clear communications between coworkers will be achieved through the following:
 - 1) In-person, daily briefings between co-workers with discussion of work completed, new work orders received, and work order prioritization and delegation. Key information form will be developed and used as a last resort when in-person communication is not a possibility.
 - 2) Create easily understandable standard signage to use whenever a piece of equipment or a specific area of the clubhouse is closed due to maintenance or cleaning.

- 3) Timely and consistent communication to members and staff will be achieved through the following: Notifying members and staff when equipment has been placed out of service and updates on estimated timeframes to be back in service via both email (to staff) and signage (to members).
2. Customer Service
 - a. Promptly respond to any comment cards that are received from members within a target time of 24 hrs.
 - b. To help *stay smart with money* and to minimize down-time—thus increasing customer satisfaction—all efforts will be made to repair malfunctioning equipment in-house prior to outsourcing repairs.
 3. Teamwork
 - a. Keep coworkers informed of the status of specific projects/jobs and offer to help each other whenever the need arises.
 - b. Clear communications will be used to help facilitate teamwork
 - c. Offer to provide coverage for coworkers as needed.
 4. Enhance Appearance and Condition of Clubhouse
 - a. Continue to solicit the help of staff for large projects (such as our annual pool PM work).
 - b. Touchup paint on a monthly basis
 - c. Spot treat carpet stains daily
 - d. Install stainless steel corner guards throughout lower-level of clubhouse.
 - e. Continue to solicit the help of other staff members to remove fingerprints and smudges from windows and mirrors throughout the day.
 5. Ensure an Efficient Use of Departmental Resources
 - a. Review and update Work Order and Preventative Maintenance systems
 - b. Review and evaluate vendors to assure quality and best costs on an annual basis (min.), including the following vendors: housekeeping supplies, HVAC, pool chemicals, fire system testing, and building security.
 - c. Develop yearly budget and monitor results through monthly review.
 - d. Reserves Projects – prioritize projects, acquire estimates timely, and implement projects timely.
 6. Planning - Assure projects are planned, managed, and communicated, including reserves, annual pool cleaning, and others as needed.
 7. Improve Safety within the Clubhouse – conduct & document monthly fire drills and safety meetings, ensure personal protective equipment is ready and available, assist with seismic evaluation implemented by outside consultant, and assist with installation of a new CC camera system throughout clubhouse and playschool.
 8. Sustainability – Keep the Clubhouse green- ecofriendly cleaning products, fireplace conversion, continue LED light conversion, efficient use of the HVAC system (i.e. detailed overrides for Events), and use of low VOC paint products.
- I. Increase Team Work - We Will be One Team
 1. The Leadership team will meet and establish strategies to work together, with mutual vision, goals, and core values.
 2. The team will incorporate the strategies in the 2016 Strategic Plan and commit to working together implement the established strategies.