

### 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. Continue to update and redevelop Master Plan for greater focus on the Goal as stated in the Objective. Staff and Committee will continue to review and implement the eight Priority Tasks outlined in the Master Plan as listed below. Add the priority of Water Resource Management. The budgeting process will be utilized to prioritize projects and secure funds where possible.
    - 1) Invasive Species
      - a) Continue to develop a comprehensive plan on eradicating invasive species and replanting with native species.
      - b) Implement first stage of the three-year plan to eradicate invasive species in the Tanglewood Park complex.
      - c) Explore cost share options.
      - d) Identify second area to begin development of three-year plan.
      - e) Post educational materials on invasive species in airlock and at work sites, and further highlighting in membership communication.
      - f) Take steps to encourage a membership Volunteer Coordinator for invasive species removal projects and work with Events Department to communicate opportunities.
      - g) Create a Mt. Park invasive/nuisance species list to be used in Common Areas as a resource for Membership and the CCR Director; post on website.
      - h) Remove ivy in Clubhouse parking lot islands as part of creating a multi-year clubhouse sustainable landscape model. Post plan and benefits in airlock, newsletter and on website.
      - i) Partner with Maintenance Department to explore opportunity of installing a water quality facility to infiltrate and direct parking lot run off as part of parking lot rehabilitation plan.
    - 2) Managed Grass Areas
      - a) To reduce mowing, water consumption and responsibly manage resources, low-function and high input, turf will continue to be identified, removed and mulched with locally sourced wood chips during growing seasons.
      - b) Turf at clubhouse will be removed and replaced with appropriate plants as part of Clubhouse Sustainable Landscape Plan.

- c) Replanting where appropriate with prioritization on street trees, greatest ecological return, and aesthetic enhancement.
  - d) Replanting will take place during the fall and winter for greatest establishment success.
- 3) Monuments.
- a) Continue to update Master Plan and identify remaining tasks.
  - b) Design and begin installation for significant reduction in the use of annual plantings and replacement with sustainable long-term plantings.
- 4) Trail Signage
- a) Develop design standards for way-finding signage and components.
  - b) Explore grant options for non-profits provided through Oregon State Parks.
  - c) Work with the Common Property Committee to name trails, identify landmarks, and prioritize signage to improve user safety enjoyment.
  - d) Involve membership in soliciting trail name options such as themed features unique to Mt. Park and its history.
- 5) Trail Management
- a) Improve pathways and access at Gress Park as part of park and watershed enhancement project.
  - b) Improve path along McNary from Monroe north.
- 6) Tree Canopy
- a) Utilize tree survey and software to identify tree planting areas. Tree planting activities will focus on canopy renewal, street tree population, and species diversity.
  - b) Update Common Property Charter to include the task of commenting on Type II removal permits sought by membership on private property.
  - c) Hold an Arbor Day tree tour and planting event utilizing tree value and species identification.
  - d) Research the feasibility of developing a “Mt. Sylvania Heritage or Specimen Tree program” which invites membership to nominate trees on private and common property. Announce this program at Arbor Day event and invite nominations for the following year.
  - e) Develop a tracking tool to identify removed trees: species, DBH and condition/ reason for removal on both Common and Private Property. Utilize this tool to determine appropriate re-planting needs to ensure canopy renewal.
    - a. Update tree software as needed.
- 7) Habitat Enhancement
- a) Complete Tanglewood Tributary project if permitting restrictions delay the construction in 2016.
  - b) Complete City pre-application process for Gress Park Playground and Springbrook Creek culvert and invasive species removal; apply to OWEB for grant and Neighborhood Enhancement Project Fund. Simultaneously initiate DSL permit application.
  - c) Research Salmon Safe Certification Program requirements and begin steps to bring common property into compliance with the program and achieve certification.
  - d) Explore opportunities to partner with the Oswego Lake Watershed Council on tributary and watershed rehabilitation.
- 8) Playground Management
- a) Continue to maintain playgrounds as needed.
  - b) Identify as landmarks in signage project.
- 9) Viewpoint Management
- Work with Common Property Committee to examine this part of the Master Plan as historical viewpoint management has been detrimental to the canopy and created significant management problems.

- 10) Water Resource Management
  - a) Continue to train staff on basic irrigation management. Begin development of an irrigation policy based on stress management watering principles.
  - b) Explore the feasibility of out-sourcing basic water management, inspections and significant repairs.
  - c) Rebuild Clubhouse irrigation and install clock for maximum water efficiency as part of Clubhouse Sustainable Landscape Model project.
  - d) Continue to develop a Common Property irrigation map.
  - e) Offer resources developed by the City to membership.
  - f) Explore developing a plan for water restrictions should the need arise.
- b. Partner Common Property Policies with Private Property CCRs for consistency and alignment with sustainable landscape principles, with special focus on Sensitive Lands designations, tree canopy health, pesticide usage, invasive species and water management. Create minimum standards for new landscape installations
- c. MPHOA Staff and Common Property Committee will continue to implement the encroachment plan, including evaluation of encroachments, letters to homeowners, and establishing agreements.
- d. Operations
  - 1) Restore non-native landscapes by completing several pruning and removal projects.
  - 2) Rework CPWR form to include email address as preferred communication, account number, current on assessments, and any pending violations. Also include verbiage on time frame to implement (Terms and Conditions). Include Policy verbiage on the form as well.
  - 3) Continue to restructure department to operate efficiently and safely.
    - a) Sell/dispose of old equipment and materials. Purchase new equipment to reduce labor.
    - b) Provide opportunities for advancing crew's skills and expertise.
    - c) Assign Assistant duties regularly to mitigate personal workload.
    - d) Repair and maintain landscape building as needed including organization for safety and efficiency.
    - e) Update MSDS documentation for landscape crew safety.
    - f) Install landscape around building to enhance the value of the RV Lot and perceived safety and monitoring.
    - g) Explore feasibility of organizing storage area by installing concrete dividers to separate materials: chips, gravel, and compost.
    - h) Continue to reduce in-house fertilizer and pesticide applications.
    - i) Initiate development of Landscape Standard Operations Procedure.
    - j) Work with the Common Property Committee to continue to review, adjust and enhance Common Property policies to address needs as they arise.
  - 4) Explore opportunity of holistically correcting RV lot drainage issues by creating a water quality facility system, then repairing asphalt and gravel parking areas.
  - 5) Begin creation of a Native Plant display garden at the entrance to the Playschool.

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) Focus on Staff Development.

- a) Establish and communicate expectations (department specific standard operating procedures to include being on time, attendance-minimum class requirements, class ownership and finding substitutes, equipment usage (putting things away and locking up stereos), time cards, and attendance tracker.
  - b) Implement quarterly assessment tool for classes to include: attendance (are participants coming back, format (teaching per schedule), class delivery (welcoming, inclusive, options for different fitness levels), connection (knowing names, eye contact, interaction), and expertise (knowledge of craft, credible verbally and physically).
  - c) Develop trainers to be hybrids, including assessment of classes currently taught by trainers, develop teaching skills, and teach class development and program design.
  - d) Implement employee of the month voted on by Fitness, KidZone and Aquatics and announced via Facebook and on communication board.
  - e) Implement internal monthly employee newsletter for employee development, including ACE/AFAA/NASM clippings, spotlight staff members (birthdays, announcements, congratulations). Include Aquatics and KidZone.
- 2) Develop Group Fitness, including land and aqua.
- a) Track attendance and measure program effectiveness/utilization based on capacity, including determining cost per head, percentage of participation, and managing by the number.
  - b) Rebuild schedules based on schedule design best practices, attendance, member traffic and feedback, and incorporate non-licensed branded classes (Bootybarre, Pop Pilates, Zumba Gold, and PiYO).
  - c) Restructure/create instructor pay scale based on certifications and experience; include pay increase structure.
  - d) Create audition and hiring process, including auditioning for teaching format, follow up interview, hiring, and onboarding process to set expectations.
  - e) Simplify substitute process, including binder update with process for requesting a sub, and instructor contact list update to include what instructors teach.
- 3) Develop Personal Training.
- a) Evaluate floor time usage and coach on effective use to build clientele.
  - b) Restructure personal trainer compensation to hourly rather than percentage in fair manner to allow better tracking of taxes and sick time for accounting as well as eliminate the contractor vs. employee concern.
  - c) Set up business planning sessions with trainers to include: discussion of building clientele, managing client files (session protocol), and set accountability for building and managing their business.
  - d) Update trainer bio wall to better highlight trainers to include head shots.
  - e) Simplify personal training offerings, including assuring all clients are members.
  - f) Offer a “Biggest Loser Contest” to kick off January and help trainers boost business and clientele.
- 4) Develop Fitness Marketing.
- a) Unclutter information boards to better distribute information.
  - b) Better utilize social media to announce events, class happenings, staff comings and goings. Facebook and direct emails will be the focus for 2017.
  - c) Offer special classes to build interest --Bring a friend free day (quarterly); theme classes (crazy sock, silly hats, super hero) with prizes; special trainer lead class (intro to TRX/foam roller, TRX for rehab/skiing); party class (Aqua Zumba, new program launch).
  - d) Social Media – better utilize Facebook and use survey monkey to track results.
- b. Program Development – Aquatics
- 1) Maintain the highest level of CDC, State and MPHQA 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 certifications, 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 meet 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 for Lifeguards. Offer First Aid and CPR/AED on a community and employee level.
    - c) Partner with other organizations for staff recruitment and development as well as programing and safety standard development. Partner with the City of Lake Oswego Dive Rescue program.
    - d) Continue to 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. Focus on increased member participation through offering priority member enrollment.
  - 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) Continue to partner with the fitness department in the yearly Health and Safety Fair, indoor triathlon training, and 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, summer/holiday camps, Soccer Shots (soccer), tumbling, yoga, and basketball. Research the feasibility of offering additional activities including after school clubs (homework, book, science or drawing) and babysitting class, monthly children’s “drop off” activity, and all other programs currently running.
  - 3) Increase member participation in KidZone by increased marketing, including email blasts, community networking, “taster” days, KidZone spotlight event, partnerships with schools, and home schooling).
  - 4) Enhance programing by partnering with outside organizations including schools, home schooling, outside sports organizations, and other health clubs.
  - 5) Increase brand identification for KidZone to have more meaning in the community by partnering with Playschool and attend the Lake Oswego Art Fair and Rock and Socks event.
  - 6) Offer a yearly Kid’s Fun Fair.
  - 7) Increase operational efficiencies by offering extended pre-care and after-care hours before and after camp.
  - 8) Research the feasibility of increasing Teen Participation by adding teen centered events such as Swim Night, Basketball Socials, and Dodgeball socials.

- 9) Increase youth use of the Clubhouse, by making the game room a “hub” for youth with more resources and activities available in this room.
- d. Program Development – Special Events
- 1) Continue and further develop past popular events and programming including: Bridal Show, Volunteer Brunch, Art in Mt. Park, 4<sup>th</sup> 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., artist’s reception, Vine Gogh, nature walks, bingo nights, wellness speakers, wine/beer tasting, babysitter training, American Red Cross Blood Drives, neighborhood recycle/shred day, weekly chair massage and parent workshop.
  - 4) In addition to the Clubhouse Committee, Social Groups (i.e. Toastmasters) to assist with ideas and/or provide volunteers for other clubhouse activities.
  - 5) Partner with local musicians to promote and offer the Mt. Park Member Appreciation Concerts. This will be 2 concerts funded by a combination of ticket sales and local sponsorship. Concerts will be free for members and a small fee for non-members.
  - 6) Offer Member Sports night with discounted pricing to key sports events, e.g., Blazers, Winterhawks, and Thorns.
  - 7) Maintain event hall rentals by networking with event planning companies and other event venues in the community.
  - 8) Promote and maintain Birthday Party offerings: offer birthday party packages, partner with outside businesses.
- 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 BBQ, Back-to-School Ice Cream Social, Holiday Music Program, Lunch on the Mayflower, Graduation, and Overnight Campout, Halloween Party, End of the year Carnival, Art Show.
  - 2) Partner with Special Events to continue the Halloween Party, Haunted House, Holiday Event, 4<sup>th</sup> of July Picnic and Easter Egg Hunt to all MPHOA children.
  - 3) Partner with Fitness and KidZone to continue to offer Kids’ Night Out, tumbling, yoga, and swimming. Participate in community activities that would include Rock/Socks Event and Lake Oswego Art Fair and Kid’s Day.
  - 4) Participate in Oregon’s Quality Rating & Improvement System (QRIS) program to improve curriculum, including a professional evaluation and recognition program for teachers.
  - 5) Begin the process for becoming an accredited preschool. Focus on – Health and Safety, Environments and Curriculum.
  - 6) Create a natural play area on the small playground – large climbing rocks, branch tents, worm and bug garden, sunflower hut, etc.
  - 7) Market Playschool through donating children’s books to local medical and dental facilities with a “donated by” label.
  - 8) Partner with accounting to explore the ability to offer playschool clients the ability to pay tuition on-line.
  - 9) Focus on increasing member enrollment by offering a discount to all members and extend an invitation to participate in priority enrollment.
  - 10) Partner with member services and accounting to create a system to track families who are members.
- f. Marketing Programming
- 1) Continue to refine current marketing techniques of website posting, email blasts, newsletter, Reader Board in the Clubhouse reception area, bulletin boards, table tents, and the Clubhouse entrance airlock.

- 2) Continue to meet with and support department heads on current and future marketing needs:
  - a) Meet with key department heads (Special Events, Playschool, Aquatics/Fitness, and Compliance) requiring marketing support to determine 2017 advertising needs.
  - b) Schedule and implement one-on-one meetings to determine their needs for advertising and marketing of their upcoming events and programing to include planning for email blasts, promotions, and advertising.
  - c) Continue to support airlock marketing for HOA, Home Care, and Landscape as well as other departments as needed.
- 3) Continue to work with local papers to advertise events and print special interest stories.
- 4) Continue the use of social media including Facebook, YouTube, and Twitter to provide interactive marketing for members.
  - a) Post Videos for program samples, class displays, personal trainer and swim instructor videos, employee presenting frequently asked questions, and meet the Board.
  - b) Creating dialog to engage members by use of surveys, meaningful conversations, and polling for interests.
  - c) Create department blogs for learning in addition to news: Tour of Mt. Park, Common Compliance Issues, Health and Wellness News, and Playschool News.
- 5) Continue to work with Dorey Design to maintain and refine the website as needed.

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

Action Strategies:

1. Board will expand linkages to other entities, such as Clackamas County and the City of Portland.
2. Schedule a joint meeting of the MPHOA Board with the City Council annually.
3. Continue to support the Mt. Park Neighborhood Association.
4. Landscape Operations Manager will continue to work with the City of Lake Oswego Planning Department, Watershed Council, and Permit Department.
5. CC&R Director will continue to work with the City of Lake Oswego’s Planning, Transportation, and Coding departments.
6. Executive Director will attend quarterly round-table discussions with the City of Lake Oswego Manager and other business leaders.
7. Work with Boy Scouts on the Lake Oswego Storm Drain Marking program, including increasing awareness and installing markers.

\*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 continuing monthly Home Care Sub-Committee meetings and routinely updating the Home Care Plan progress tracking tool. Staff will continue to work with MPHOA 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 MPHOA members a preferred discount.
  - b. Work with the Architectural Committee to revise and update Architectural Policies and Procedures as needed, to include review and update of the pre-approved materials list.
  - c. Continue to review and update the Home Care Policies and Procedures as needed.
2. Continue to 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 MPHOA 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 homeowners 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. Continue to explore ways to share Welcome Packet information with Realtors.
  - c. Send letters to all new homeowners within 30 days of moving into Mt. Park, offering new homeowner orientation on an individual basis to 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. Assist Landscaping staff in providing handouts and education on invasive species and natural habitat per the Common Property Master plan.
  - e. 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, Reserves, and Safety Committee.

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



Action Strategies:

1. Board and Staff will focus on individual apartment owners and ensure that renters are receiving support from MPHOA Staff.
2. Board and Staff will encourage renter participation in the Mt. Park Neighborhood Association.
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. Staff will ensure renters receive the Clubhouse FAQ sheets upon their first Clubhouse visit or as needed.
4. Ensure a clear link to apartment managers as it relates to home care and parking.
5. 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. (Mt. Park Neighborhood Association or Committee involvement).
2. Increase advertisement of Board Meetings and Committee Meetings to enhance communication and involvement of homeowners through updated calendars on the website and newsletter articles.

**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. Assuming bag pick up is successfully eliminated in 2016, Landscape Department will continue to provide resources and information on home composting to membership. Explore selling compost bins at a discount.
2. Continue to research feasibility of community debris days facilitated by MPHOA.

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. Refine the system for tracking training.
  - 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/AED 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.
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. Continue to partner with the fire department and refine the process for emergency evacuation drill on a monthly basis. Implement an Earthquake Evacuation, Missing Child, and Suspicious Individual drill at least twice per year.
  - e. Continue to offer the following safety training programs upon orientation and annually: Vehicle Safety (for staff driving on the behalf of MPH OA), Workplace Bullying, Online Social Networking, Return to Work, and Abuse Prevention.
  - f. The earthquake emergency procedures will be reviewed and enhanced by first quarter 2017 and will include Clubhouse, Landscape, and Playschool.
3. Continue monthly Safety Committee Meetings to include a representative from each department.
- a. Continue to track and review all Staff and member incidents and recommend interventions as needed.

**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 MPH OA will continue to streamline the website to enhance appearance, with more abundant resources for members, and 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 adding a weather station and camera to the website.

Objective 2 – MPH OA 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. Reinforcement of standards will occur through 1:1's and in-services.
  - d. Research the feasibility of hiring an emergency service to answer phone calls after hours.

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 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. Partner with Compliance to assure ACH information and promotional materials are included in new homeowner packets.
  - b. Promote ACH via newsletter articles (monthly insert with expanded article in November and May), ACH brochures in the airlock and on the Community grid wall, and other ongoing education.
  - c. Schedule with Member Services for email blasts and alerts on the website to remind property owners of ACH availability and sign up deadlines.
  - d. Semi-annual campaigns (June and December) will continued to be offered to sell the value of using ACH.
  - e. Focus ACH marketing on those that pay late. Include mailer in each bill.
2. Staff will provide notice regarding assessment due dates to be included with each semi-annual billing. Key points will include:
  - a. Assessments are due every six months, whether the generated bill is received or not.
  - b. Late fees are added after 30 days and will not be waived by the accounting department.
  - c. Payments should be sent to the Lock Box address on the bill.
  - d. Account numbers must be noted on the payment check.
  - e. Include note to condo and townhome owners that MPHOA is a separate entity from their condo/TH association.
3. Staff will continue the collection process to include:
  - a. Partner with Member Services to schedule email blasts and alerts on the website, reminding property owners when assessments are due.
  - b. Process Past Due billing in February and August.
  - c. Send collection Demand Letters 15 days after past due billing.
  - d. Turn account over to collection 30 days after Demand Letter.
  - e. Continue to utilize collection agency support and increased involvement of Accounting Clerk in the collection process.
  - f. Draft and send an After Pay Off letter and ACH form to property owners once they are paid off with the Collection Attorney.
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.

D. Expansion of IT services

1. Review, manage and implement IT structure, including software and hardware. Computers/hardware will be replaced as allocated in the 2017 Reserves Budgeting Process.

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

1. Staff will continue to refine and continue to train on the use of the software.
  - a. Staff will research the feasibility of expanding use to include payroll time cards.

- b. Staff will continue to educate members about the features and benefits of the new system.
- c. Staff will receive training on the new software upon orientation and as needed.

F. Accounting Department – increase efficiencies

- 1. Evaluate the current accounting software and seek greater efficiencies.
  - a. Research affordability of using other industry specific accounting software vs. QuickBooks.
  - b. Review HR software and see if comparable or greater efficiencies can be achieved through outsourcing payroll.
- 2. Refine the Payroll process
  - a. Explore the feasibility of adding electronic time card capabilities through the new Member Services Software provider or through outsourced payroll.
- 3. Explore options to add up-to-date deeds and owner information to Accounting software.
- 4. Work with Member Services to add MPHOA account numbers to all Compete accounts.
- 5. Research and request proposals from qualified CPA firms no later than May 2017.

G. 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) Continue in-person, daily briefings between co-workers with discussion of work completed, new work orders received, and work order prioritization and delegation. Use key information form as a last resort when in-person communication is not a possibility.
    - 2) Continue to use signage whenever a piece of equipment or a specific area of the clubhouse is closed due to maintenance or cleaning.
    - 3) Continue to timely and consistently communicate to members and staff by 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. Continue to promptly respond to any comment cards that are received from members within a target time of 24 hrs.
  - b. Continue to *stay smart with money* and 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. Continue touchup paint on a monthly basis.
  - c. Continue to install stainless steel corner guards throughout lower-level of clubhouse if not completed in 2016.
  - d. Continue to solicit the help of other staff members to remove fingerprints and smudges from windows and mirrors throughout the day.
  - e. Continue to respond to the Clubhouse Committee Environmental Audit.
- 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. (HVAC is scheduled to be changed at contract renewal; office supplies and security systems are high priority targets to be evaluated).
  - 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 evacuation drills and safety meetings, ensure personal protective equipment is ready and available, assist with seismic upgrade project to be implemented by outside consultant, and assist updating the emergency evacuation plan. Evaluate the feasibility for adding another safety board downstairs that is accessible to staff.
- 8. Sustainability – Keep the Clubhouse green- ecofriendly cleaning products, continue LED light conversion, use of low VOC paint products, and efficient use of the HVAC system (i.e. detailed overrides for Events, working with other departments to assure doors are kept closed..

H. Increase Team Work - We Will be One Team

- 1. Continue to develop the leadership team through a combination of in-house, outside consultant, and off-site trainings.  
The team will incorporate the strategies in the 2017 Strategic Plan and commit to working together implement the established strategies.

I. Communication – Develop increased communication to Mt. Park HOA members.

- 1. Continue to develop the website and make more user-friendly.
- 2. Continue to send electronic newsletter, email blasts, intra-Clubhouse marketing, and networking with Members.
- 3. Develop and mail a paper version of the newsletter (including Annual Meeting Newsletter) three times per year.

J. Tax Planning

- 1. Work with CPA and Tax Attorney to better understand tax planning, including options for filing income taxes (1120 or 1120-H).
- 2. Develop systems to manage income, expenses, and reserves on a monthly basis to ensure the best options for tax filing and the applicable tests in qualifying for the options are identified and met.