



## 2018 Strategic Plan

*Reviewed and Adopted by the Board of Directors,  
October 24, 2017.*

### I. WHO WE ARE – THE VISION OF MOUNTAIN PARK

Mountain Park is one of the largest and most successful planned communities in the country. Over 8,000 people live here, representing a diverse demographic cross-section, from families with young children and retirees to renters and homeowners. Its location, nourishing aura, and focus on meandering streets, parks, paths, views and natural atmosphere have endured as amenities since its founding in 1968. Even through a period of generational change, community character has remained constant. To serve and protect this entity, an association of homeowners provides quasi-government, guided by a 12-point set of values:

<b>Can do</b>	<b>Invite change</b>	<b>Be accountable</b>	<b>Get better</b>
<b>Be fair</b>	<b>Sustain our place</b>	<b>Stay smart with money</b>	<b>Figure it out</b>
<b>Observe the rules</b>	<b>Reach out to people</b>	<b>Share what you know</b>	<b>Be healthy</b>

The Association’s four focus areas:

#### **Common Property**

A scenic, landscaped, park-like setting on 185 acres of common property is open to all residents. Native trees, shrubs, floral beds, monuments and view vistas are mature and carefully maintained. Neighborhood streets are ungridded, creating inviting small nooks and neighborhoods. Networks of walking paths, parks, playgrounds and tennis courts draw people outside. A pervasive sense of naturalness, sustainability and worth prevails.

#### **Community Care**

Pride in place exists here that esteems the natural and extends all the way down to house and lawn maintenance. Guides for space use and building are embraced as positive protectors of neighborhood character, quality and value. Doing one’s part to keep things nice is expected, and people who live here feel empowered with a common concern: To uphold and preserve Mountain Park.

#### **Community Center**

Our 43,000 sq. ft., professionally-managed community center offers residents an aquatics facility, sports court, workout equipment, fitness classes, reading and meeting rooms and a wide roster of other recreational and social programs and services for members of all ages. The PlaySchool at Mountain Park and the KidZone Express offer childcare for children up to five years old. Essentially the community’s gathering place and living room, the clubhouse provides friendly, involving activity opportunities for members, tuned to community wishes regarding modest complexity and cost.

#### **Civic Governance**

Guided by our founding codes, covenants and restrictions, the Mountain Park Home Owners Association board, committees and employees strive to serve the member community in a respectful and professional way. Policies and practices are described in codes and rules that promote transparency and consistency as board make-up and management evolves.

## II. 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 1A - Annual Timeline of Maintenance Activities

In order to implement the Common Property Master plan to its fullest, we need to develop an Annual Timeline of Maintenance Activities, which will include a work calendar based on locations, priorities, tasks, tools and human resources.

Action Strategies:

1. Organize and develop Landscape Shop in support of Annual Timeline of Maintenance Activities.

#### 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 Priority Tasks outlined in the Master Plan as listed below. Prioritize Water Resource Management in the Master Plan. 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 managing invasive species and replanting with appropriate plant species.
      - b) Revise and rework multi-year plan to manage invasive species in Tanglewood Park.
      - c) Explore cost share options, i.e., OLWC, WMSWCD, CSWCD, and others.
      - d) Review, generate, and post educational materials on invasive species in airlock and in common property, referencing City of Lake Oswego, Metro, and ODA's lists as a resource for MPHOA staff and community; print in newsletter and post on website.
      - e) Take steps to encourage a MPHOA member Volunteer Coordinator for invasive species removal projects and work with Events Manager to communicate opportunities.
      - f) Continue to remove ivy around Clubhouse as part of creating a multi-year sustainable landscape. Post plan and benefits in airlock, newsletter and on website.
    - 2) Managed Grass Areas
      - a) To reduce mowing, water consumption and responsibly manage resources, low-function and high input, continue to identify turf areas to remove, replant with appropriate plantings and mulch with locally sourced wood chips during growing seasons; prioritize street trees, greatest ecological return, and aesthetic enhancement.
      - b) Evaluate outside contractors and request for proposals.

- 3) Monuments
  - a) Continue to update Master Plan and identify remaining tasks, including completing inventory of monuments with irrigation and planting needs, etc.; develop Standard Operating Procedures for monuments.
  - b) Design and continue installation for reduction in the use of annual plantings and replacement with long-term plantings.
- 4) Trail Signage
  - a) Request proposals to develop design standards for way-finding signage and components.
  - b) Explore grant options for non-profits provided through Oregon State Parks and others.
  - 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) Complete inventory, working trail maps, and evaluation of trails; revise 2009 Alta Trail Report and bring it up to date.
  - b) Develop Standard Operating Procedures for trail management.
  - c) Identify priorities in trail work and procure long-term proposals for sectional replacement to improve accessibility, safety, and overall trail quality; focus on Tanglewood Park trails.
  - d) Investigate and acquire tools and equipment necessary for managing and maintaining trails and parks.
- 6) Tree Canopy
  - a) Revise and expand line item for Tree Maintenance within the budget in order to do preventative maintenance.
  - b) Utilize tree survey to identify necessary tree work to mitigate potential hazards and maintain overall tree health. Tree planting activities will focus on canopy renewal, street tree population, and species diversity.
  - c) Host a tree planting event.
  - d) Develop a tracking tool in coordination with the Common Property Committee and CC&R Manager 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.
  - e) Share the priority of maintaining and increasing the tree canopy in MPHOA with membership via newsletter and other outreach (such as [canopy@mtparkhoa.com](mailto:canopy@mtparkhoa.com)) in an effort to encourage more appropriate tree planting on common property.
  - f) Investigate the possibility of using common property as a site of mitigation tree plantings for homeowners in conjunction with CPC and CC&R.
- 7) Habitat Enhancement
  - a) Continue working on Tanglewood Tributary project (more plantings, trail work, park maintenance, regrading, etc.).
  - b) Identify appropriate steps necessary to replace culverts in Tanglewood Park with bridges.
  - c) Research Salmon Safe Certification Program and Certified Backyard Habitat requirements; explore opportunities to partner with different organizations to achieve compliance, such as Columbia Land Trust, Audubon Society of Portland, City of Lake Oswego, OLWC, etc. on tributary and watershed rehabilitation.
  - d) Explore the feasibility of creating a Native Plant display garden.
- 8) Comprehensive Park Management
  1. Investigate feasibility of identifying and developing Standard Operating Procedures within park boundaries, and add these SOPs to the CPC policies.
  2. Explore the feasibility for facilities in Tanglewood Park.

- 9) Playground Management
  - a) Continue to maintain playgrounds as needed in correlation with MPHOA Facilities department.
  - b) When updating and/or replacing playground equipment, explore the opportunity to make playgrounds more accessible for people with disabilities.
  - c) Identify as landmarks in signage project.
  - d) Explore options for creating nature play areas in multiple locations beyond current playground sites; procure proposals from Learning Landscapes and other design-build companies.
- 10) Viewpoint Management
  1. Continue evaluating current viewpoint management policies; modify as needed.
- 11) Water Resource Management
  - a) Continue to train staff on basic irrigation management. Begin development of Standard Operating Procedures for irrigation, based on stress management watering principles.
  - b) Clearly delineate responsibility of irrigation activities within the Landscape Stewardship Department and with outside contractors.
  - c) Request proposals to out-source certain irrigation activities, which may include the irrigation system at the Clubhouse, as well as inspections and significant repairs within MPHOA.
  - d) Maintain and expand Clubhouse irrigation systems as needed for maximum water efficiency and for future plantings.
  - e) Begin to develop a Common Property irrigation map, including locations of water meters, valves, control boxes, and zones.
  - f) Become familiar utilizing resources developed by the City for water management and provide outreach to our community.
- b. Revise Common Property Policies in conjunction with Private Property CC&Rs and with the City of Lake Oswego's policies for clarity and consistency based on sustainable landscaping practices, such as tree canopy health, Integrated Pest Management (IPM) strategies, invasive species monitoring and/or removal, and creating wildlife habitat.
- c. Investigate City of Lake Oswego's Sensitive Land Codes and incorporate appropriately within the CPC Policies with support from Sensitive Lands Task Force and in conjunction with the CC&R Manager.
- d. CPC Policies and the Landscape Stewardship Department's management practices shall incorporate evaluation, monitoring, and appropriate techniques for drainage issues and for mitigating landslides outside and within the boundaries designated as Resource Protection/Conservation Districts.
- e. Use industry best management for new landscape installations, regarding plant selection, irrigation, etc.
- f. Landscape Stewardship Department continues to support CC&R Manager and Common Property Committee related to encroachments.
- g. Operations
  - 1) Initiate development of Standard Operating Procedures for landscaping tasks.
  - 2) Restore landscapes by completing several pruning and removal projects.
  - 3) Continue revising CPWR form with input and support from other MPHOA staff to increase efficiency and accountability between departments.
  - 4) 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; clarify line item in budget for professional development.
    - c) Delegate duties to staff regularly to share workload.
    - d) Repair and maintain landscape building as needed including organization for safety and efficiency.

- e) Continue to operate Landscape Shop in accordance with OSHA and Oregon BOLI (Bureau of Labor and Industries), including updating SDS documentation, etc.
- f) Continue installing landscape around shop to enhance the value of the facilities and perceived safety and monitoring.
- g) Prioritize reorganization of storage area and assess feasibility of installing concrete dividers to separate materials: chips, gravel, and compost.
- h) Continue to utilize organic products for fertilizer and pesticide/herbicide needs, as well as follow Integrated Pest Management practices in order to mitigate the needs for synthetic chemical products.
- i) Work with the Common Property Committee to continue to review, adjust and enhance Common Property policies to address needs as they arise.

Objective 2 - Continually develop the special asset of our Clubhouse (Community Center) programs including maintaining the quality of existing programs adjusting the recreational, social, and cultural offerings to better meet the changing needs of the Mountain Park Community.

Action Strategies:

1. MPHOA Staff will take responsibility for developing strategies to implement the objective as follows: Continue engaging and utilizing the Clubhouse Committee to shift the culture through development of new and continued evaluation of current policies and procedures to better mesh with Clubhouse operations with the needs of the members.
  - a. Program Development – Fitness
    - 1) Focus on Staff Development
      - a) Establish and communicate department specific expectations and standard operating procedures.
      - b) Develop Group X assessment tool and implement quarterly class assessments and instructor evaluations.
      - c) Implement employee of the month voted on by Fitness, KidZone and Aquatics staff and announce results via Facebook and communication board.
      - d) Implement quarterly employee newsletter for employee development, including ACE/AFAA/NASM clippings, spotlight staff members (birthdays, announcements, congratulations). Include Aquatics and KidZone.
      - e) Update and refresh current programming to reach a wider range of age groups and fitness levels within Mountain Park.
    - 2) Develop Group Fitness Classes
      - a) Measure program effectiveness evaluating attendance and percentage of participation
      - b) Rebuild schedule based on schedule design best practices, attendance, member traffic and feedback. Incorporate non-licensed branded classes (Bootybarre, Pop Pilates, Zumba, PiYo)
      - c) Restructure instructor pay scale based on certifications and experience. Include incentivized/performance based increase structure.
      - d) Create audition and hiring process, including auditioning interview, hiring and onboarding process to set expectations.
      - e) Simplify substitute process, including binder update with process of requesting sub and instructor contact list including what instructors teach.
    - 3) Develop Personal Training.
      - a) Evaluate floor time usage and coach on effective use of to build clientele.

- b) Set up business planning sessions with trainers to include: discussion of building clientele, managing client files (develop session protocol), and set accountability for building and managing their business.
  - 4) Fitness Marketing.
    - a) Unclutter information boards to better distribute information. Create logo and branding for Fitness & Aquatics.
    - b) Better Utilize social media to announce events, class happenings, staff comings and goings. Facebook and direct emails will be the focus for 2018.
    - 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 classes (intro to TRX/Foam roller, TRX for rehab/skiing); party classes (Aqua Zumba, new program launch).
    - d) 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/promote surveys through new avenues.
  - 5) 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).
  - 6) Grow the annual Health and Well Fair.
  - 7) 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.
  - 8) Reconfigure fitness floor to accommodate demand and allow for increased usage of most utilized areas.
  - 9) Partner with Special Events and KidZone to offer family oriented social events focused on fitness, movement and play such as quarterly, Kickball at Touchstone, Field Day, and Father Daughter Dance.
  - 10) Reintegrate paid specialty classes and workshops.
- 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.
    - 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) Evaluate and update as needed Aquatics Staff job descriptions.

- d) Continue Aquatic Staff training, including formal in-service schedule, 1:1 training, drills, monthly physical standards, and team guided evaluation.
  - e) Create a training program for new hires and for promoting staff members to swim lesson instructors or lead guards.
  - f) Create an incentive program for the Lifeguard Staff.
  - g) Maintain files of trainings and certifications on each Aquatics Staff member.
  - h) Develop, educate, and implement Red Cross Swim Lessons through promoting staff WSI certifications.
- 3) Continue to evaluate and enhance Aquatics programming:
- a) Increase youth aquatics program via group lessons through Red Cross, increase private and semi-private lessons, community water safety awareness program, and continued focus on increased member participation through offering priority member enrollment.
  - b) 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.
  - c) Continue to partner with the Fitness department in the yearly Health and indoor triathlon training
  - d) Create more interest in swim club by designating a time and date for try-outs. Increase offerings of pool oriented events such as underwater Easter egg hunts or pumpkin relays. Partner with other pool staff to explore ideas for events.
  - e) Create parent/child preschool classes for those not ready to swim without a parent in the water.
- c. Program Development – KidZone
- 1) Use data-analysis techniques to identify trends in KidZone programming attendance rates and evaluate the ideal programs, days, times, and rates that will lead to successful programming.
    - a) Have data-analysis completed by January 1, 2018
    - b) Implement results from data analysis by April 1, 2018
    - c) Better coordinate with Aquatics youth classes and PlaySchool classes to avoid programming that conflicts with each other or leads to student extracurricular fatigue.
  - 2) Implement and enhance programming through a partnership between the interdepartmental entities of Special Events, PlaySchool, Fitness, and Aquatics.
    - a) Provide KidZone representation at one event from each department within the year of 2018
  - 3) Review current extracurricular programming and further develop as needed to include: Kids Night Out, soccer, tumbling, yoga, dance, and basketball.
    - a) Establish at least 3 connections with the local basketball community by February 2018 to assess potential for building a Mountain Park basketball program
    - b) Research the feasibility of offering youth martial arts programming to start in Fall 2018
  - 4) Enhance current childcare programming to improve quality standards through staff training and development.
    - a) Require one comprehensive staff training day to take place at the start of every summer, prior to camp
    - b) Conduct KidZone part-time staff evaluations once per year to assess strengths and weaknesses of each team member
  - 5) Develop childcare programming by offering “All-Day” programs on no-school days in addition to school break camps.

- a) Start offering “All-Day” programs by Fall 2018
- 6) Increase member participation in KidZone with strategic marketing efforts.
  - a) Advertise programs using KidZone specific email blasts, community networking, signage, tabling at all Mountain Park community events, and advertising through web-based venues
  - b) Expose school break campers to facility programming by scheduling instructors to feature their classes at least once during each camp week
- 7) Increase brand identification for KidZone to have more meaning in the community by tabling at local “Back-to-School-Night” events at neighborhood schools.
  - a) Connect with two local elementary schools and attend their “Back-to-School-Night” events in Fall 2018
- 8) Develop relationships with outside companies and organizations such as local schools, home schooling, sports clubs, and youth non-profits.
  - a) Connect with three external organizations and promote KidZone programming through at least one venue in a recognizable capacity
- 9) Build KidZone program stability by partnering with and catering to the needs of the PlaySchool through the promotion of classes that cater to their age group and skill level that occur throughout the PlaySchool program day known as “PlaySchool Enrichment Classes”
  - a) Offer a free preview of Enrichment Classes for students the final week of each quarter
- 10) Increase awareness of KidZone programs by offering a yearly free “KidZone Party” at Touchstone Park that will feature the diversity of classes and childcare options available at the Mountain Park Clubhouse. Games and activities will be facilitated by KidZone staff.
  - a) Host community “KidZone Party” in July 2018
- 11) Research the feasibility of increasing Teen Participation by adding teen centered events such as Swim Nights, Basketball Socials, and Glow Parties.
  - a) Offer two Teen Events over the course of 2018
- 12) Continue the growth in popularity of KidZone Birthday Parties to increase overall revenue for the KidZone department.
  - a) Re-brand birthday parties to amplify their association with KidZone
  - b) Increase the quality of birthday parties to include themes, decorations, activities, and notable customized signage for attendants
  - c) Improve the check-in and check-out system for party attendants for facility and member safety
  - d) Better promote birthday parties by revitalizing marketing materials

d. Program Development – Special Events

- 1) Continue to develop Mt. Park Special Events which includes weddings, receptions, larger parties and other such events requiring the use of the Hawthorn Room.
  - a) Set intentional goals and expectations for each event in 2018.
  - b) Evaluate and restructure previous events.
  - c) Limit daytime non-member events such as realtor workshops in order to better accommodate member needs and requests.
  - d) Direct focus toward more Mt Park member related events and services.
  - e) Make necessary adjustments within the larger event contracts with the following intents: profitability; provide excellent customer service through well trained staffing, create lasting customer experiences, and create positive Mt Park marketing through branding efforts within each event (swag bags, gift baskets, water bottles, pens, mints, etc.)
  - f) Maintain event hall (Hawthorn) rentals by networking with other event planning companies and event venues in the community.

- 2) Continue in-house collaboration for events that will include MPHOA children, including Halloween party/carving, Holiday event, 4<sup>th</sup> of July activities, Easter Egg Hunt, and movies in the park.
- 3) Continue and further the expansion of social events and activities within the Community. Include the following but evaluate other meaningful options: Holiday Bazaar, Mt. Park Home Show, American Red Cross Blood Drive, Health & Wellness Fair, Bingo Nights, Artist's Reception, Chair Massage Concerts.
- 4) In addition to the Clubhouse Committee, work with Social Groups (i.e. Toastmasters) to assist with ideas and/or to provide volunteers for other Clubhouse activities.
- 5) Partner with local musicians to promote and offer the Mt Park Member Appreciation Concerts. Concerts to be funded by a combination of ticket sales and local sponsorships. Concerts will be free for members and a small fee charged for non-members.
- 6) Offer Member Sports Nights with discounted pricing to key sporting events such as Blazer, Timbers, and Thorn games.
- 7) Plan, develop and implement the Mt Park HOA 50 year celebration. Collaborate with the AD HOC and Clubhouse Committees. Consider length of celebration (month long, week or weekend event), food trucks, music, etc.. Create historical timelines with past photos, newsletters, and other logistical details.
- 8) Create and implement new HOA Committee/Sub-Committee meeting guidelines that take place in the Clubhouse. Adopt policy for booking rolling meetings 6 calendar months out.

e. Program Development – PlaySchool

- 1) Program Development – PlaySchool
  - a) Participate in SPARK formally known as (QRIS) program to improve curriculum, including a professional evaluation and recognition program for teachers.
  - b) Begin the process for becoming an accredited preschool. Begin Environments and Curriculum. Complete Health and Safety
- 2) PlaySchool Environment
  - a) Complete our natural play area on the small playground – large climbing rocks, branch tents, worm and bug garden, sunflower hut, etc.
  - b) Discuss the feasibility of relocating the playground fence to incorporate lower playground.
- 3) Marketing
  - a) Market PlaySchool through donating children's books to local medical and dental facilities with a "donated by" label.
  - b) Partner with accounting to explore the ability to offer PlaySchool clients the ability to pay tuition on-line.
  - c) Focus on increasing member enrollment by offering a discount to all members and extend an invitation to participate in priority enrollment.
  - d) Design new marketing packet for fairs and tours
- 4) Events
  - a) Continue and further develop past popular PlaySchool annual parties and events to include: Ice Cream Social, Halloween Party (PlaySchool and residents), Lunch on the Mayflower, Parent Appreciation Week, Easter Egg Hunt, Spring Concert, Mother's Day, Pre-K graduation, Father's Day BBQ and Friday PlaySchool Swim. Possible participation in the LO 4<sup>th</sup> of July Parade.
  - b) Partner with Special Events to continue the Halloween Party, Holiday Event, 4<sup>th</sup> of July Picnic and Easter Egg Hunt to all MPHOA children.
  - c) Partner with Fitness, Aquatics and KidZone to continue to offer Kids' Night Out, tumbling, yoga, and swimming. Participate in community activities that would include Rock/Socks Event.
  - d) Incorporate more 'Family Fun Events' – Messy art night, Family yoga night.
- 5) Staff Development
  - a) Participate in SPARK formally known as (QRIS) program to improve curriculum, including a professional evaluation and recognition program for teachers.
  - b) Provide In-house trainings.
  - c) Recognize staff talents and utilize them to assist with ideas for marketing and programing.

- g. 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) Determine the feasibility of advertising in the various kiosks located on Common Property.
  - 3) Each Department will manage the marketing and promotion of their activities.
    - a) Key department heads (Special Events, PlaySchool, Aquatics/Fitness, Landscape, and Home Care) will determine in the 2018 budgeting process their needs for advertising and marketing of their upcoming events and programming to include planning for email blasts, promotions, and advertising.
  - 4) Continue to work with local papers to advertise events open to non-members and print special interest stories.
  - 5) Continue the use of social media including Facebook, Nextdoor, and Twitter to provide interactive marketing for members. Create dialog to engage members by use of surveys, meaningful conversations, and polling for interests.
  - 6) Continue to work with Dorey Design to maintain and refine the website as needed.
  
- h. Member Services Programming
  - 1) Staff Development
    - a) Create staff onboarding to include updated manual, department training and coordination with other departments.
    - b) Create and conduct ongoing staff training and development, including excellence in customer service and ongoing front desk staff meetings.
  - 2) Database/Member Information Management
    - a) Update member information and clean-up database to eliminate duplicate entries of people and addresses.
    - b) Monitor staff data entry to ensure data is accurate and old data is removed.
  - 3) Apartment Renter Communication
    - a) Collaborate with the apartment complexes and property management companies to ensure new tenants receive correct information regarding processes to set up clubhouse membership.
    - b) Establish and effectively manage renter memberships and movement of tenants within the Compete (member services software).
  - 4) Point-of-Sale Management
    - a) Partner with Accounting and Jonas Compete (member services software) to find best set-up for MPHOA's unique needs involving member and non-member GL codes.
    - b) Reconfigure online sales creating an easy and clean way for members to register and pay for classes and purchase private lessons.
    - c) Create a verification and proofing process to be used prior to uploading new classes and product launches.
  
- h. Landscape Department Community Engagement
  - 1) Explore the feasibility of the Landscape Stewardship Department offering educational workshops on the following topics: home composting, native plants, best practices for sustainable land management (i.e., alternatives to chemical herbicides/pesticides), pruning, native pollinators and beneficial insects, home vegetable gardening, rain gardens, seasonal maintenance, water-wise irrigation (including drip irrigation), youth nature skills (including birdhouse construction), and nature walks.

- 2) Explore the feasibility of the Landscape Stewardship Department offering seasonal internships and continue hosting at least quarterly volunteer opportunities; Work with Boy Scouts on stewardship projects, such as the Lake Oswego Storm Drain Marking program.

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

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 Stewardship Director 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. Board and Staff will work with the City of Lake Oswego to determine the feasibility of using Mt. Park as test site for municipal sponsored wide-band for Mt. Park businesses and residents.
8. Continue to pursue working with the City of Lake Oswego on a plan for addressing key parking and traffic safety issues on public streets.

\*Objective 4 – Increase the awareness of, and compliance with, the Architectural Application Process and Home Care Program.

Action Strategies:

1. Review all governing documents and Board decisions to develop ways to be proactive with the expectations MPHOA has for its owners.
2. Continue to focus on a proactive Architectural and Home Care Programs by continuing monthly Committee meetings. Staff will continue to work with the 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.
  - 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.
    - 1) Develop a survey for owners to submit their thoughts and ideas on the architectural process for the committee to review
    - 2) Develop a way to be proactive and inform owners of the expectations the Association has for construction projects and contractor behaviors
      - i. Review architectural application and policy and procedures document: Solar panels
      - ii. Landscaping – native species
      - iii. Colors – develop a color palette
      - iv. Air conditioners and window units
      - v. Exterior Lighting
      - vi. Temporary Storage Units, Large Dumpsters, outhouses
      - vii. Others – concrete tinting, etc.
  - c. Continue to review and update the Home Care Policies and Procedures as needed.
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 violations of the CC&R's are documented each month.

5. Purchase and set up mobile software (Full focus) for Homecare and Architectural file procedures and tracking. Use software to track tree permits for who requests the work to be done, whether the tree is on common property or private property and number of tree removed from Mt. Park.
6. Continue to develop the new homeowner orientation program for new homeowners. Staff will take the lead as follows:
  - a. Develop a 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. Send Welcome Letters to all new homeowners as soon as possible after receiving new owner deed, offering new homeowner orientation on an individual basis to ensure that the owner is given appropriate information.
7. CC&R Manager will assure the programs are promoted through the standard 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.
  - b. Develop information for owners regarding good times of the year to do certain home projects. Post Home Care tips and news.
  - c. Post standards for maintaining landscaping, bin storage, siding, roofs, sports equipment, etc.
  - 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.
6. Work with Events Manager to host a Home Show in late March/early April with contractor stations and Association information
7. Support current Community Enhancement Programs and explore the feasibility of other Programs.

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 and facilitation of 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 as well as Board appointed Ad Hoc Committees or Task Forces.

Objective 2 – 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.
3. Staff will assure absentee owners are receiving communication.

**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 investigate ways to restructure the yard debris service and assure that it is safe, economical and sustainable.

Action Strategies:

1. Explore the City of Lake Oswego's resources for home composting and options for yard debris.
2. Continue to offer Open Hours for MPHOA members and explore the possibility of expanding this service.
3. Investigate the feasibility of contracting out the yard debris collection within MPHOA boundaries.

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. Partner with HR dept. to refine our system for tracking training and update in ADP.
  - 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, 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 Plan 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 MPHOA), Workplace Bullying, Online Social Networking, Return to Work, Stress Management, Difficult Customers, and Abuse Prevention. Incorporate these policies with the exception of the Vehicle Safety, in the Employee Handbook.
  - f. The earthquake emergency procedures will be reviewed and enhanced by first quarter 2018 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. All incidents and accidents are reported to the BOD on a monthly basis.
  - b. Perform quarterly inventory checks on all first aid kits.
  - c. Determine a central location to store all earthquake kits.

**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 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 finalize website enhancements completed in 2017 to assure the website is user-friendly.
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. Work with in-house Web-Support staff member to assure website changes, postings, and upgrades are completed in a timely and professional manner.

Objective 2 – MPHOA will develop a Professional Marketing/Public Relations Program designed to increase public recognition and cohesiveness 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 realtors to better understand the features and benefits of living in Mt. Park so they can educate potential and new homeowners. Assure the Realtors page on the website contains beneficial information for Realtors to assist their clients.

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 (members and staff) 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.

**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 and Accountant will provide a Financial Report to the Finance Committee and Board on a monthly basis.

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

1. Contract with an outsourced payment collection service to allow property owners the ability to pay online with e-check or credit cards.
2. Staff will continue to promote ACH through education and targeting the slow and late payers.
  - a. Continue to partner with Compliance to assure ACH information is included in new homeowner letter.
  - b. Continue to 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 in-house website lead 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.
3. Explore the feasibility of contracting with a new statement processing service that integrates more efficiently with current accounting software (QuickBooks).
4. 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 may 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.
5. Staff will continue the collection process to include:
  - a. Continue to partner in-house website lead to schedule email blasts and alerts on the website, reminding property owners when assessments are due.
  - b. Continue to process Past Due billing in February and August.
  - c. Target to send collection Demand Letters 15 days after past due billing.
  - d. Target to turn account over to collection 30 days after Payment 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.
  - g. Staff will meet with Vial Fotheringham annually or as needed to review the collection process and strategies for collecting delinquent accounts.
  - h. Accounts Receivable will be reviewed semi-annually and as needed by the Staff and Finance Committee.

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 2018 Reserves Budgeting Process.
2. Begin the process of evaluating IT services and costs, including interviewing other firms.

E. Accounting Department – increase efficiencies

1. Set standard hours for the HOA operations ensuring that the Front Desk and MODs can direct all after hour Accounting and Compliance calls with confidence of when available.
2. Meet with Clubhouse Services Director and other department managers as necessary to determine new general ledger account numbers and descriptions to aid in departmental budgeting and financial reporting.
3. Prepare complete and well documented Standard Operating Procedures for all aspects of the Accounting and Admin functions, including QuickBooks, Complete, ADP, and all other commonly used programs by those softwares.
4. Cross train Accountant, Accounting Clerk and Administration Clerk on all common job duties.
5. Reorganize and reassess the storage of business documentation, accounting, payroll, and collection files to ensure easier access while maintaining confidentiality of information.
6. Evaluate the current accounting software and seek greater efficiencies.
  - a. Research affordability of using other industry specific accounting software vs. the current accounting software (QuickBooks).
  - b. Partner with Compliance to find efficient data sharing between Compliance software and QuickBooks.
7. Populate and expand the ADP Payroll and Human Resources packages
  - a. Obtain better training for report preparation
  - b. Import all employees' pay rate history into ADP
  - c. Add all licensing and certificate information to employee records in ADP
  - d. Explore the feasibility to set up all benefits information through ADP
  - e. Look at ADP for 401(k) brokerage options.
8. Explore options to add up-to-date deeds and owner information to Accounting software.
9. Work with Member Services to add MPHOA account numbers to all Compete accounts.
10. Continue to work with CPA firm on review of financial presentation.

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

1. Coworker Communication
  - a. Clear communications between coworkers will be achieved through the following: In-person, daily briefings between co-workers (Facilities Director, Maintenance Manager, and Facility Services Technician) will continue to include the discussion of completed work orders, progress of work orders, new work orders—along with their prioritization, and any other pertinent information. When in-person communications are not possible, emails, phone calls, text messages, and our daily communication log book may be utilized.
2. Member and Staff Communication
  - a. Continue to use signage whenever a piece of equipment is out of order or a specific area of the clubhouse is closed due to maintenance or cleaning.
  - b. 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).
3. 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. To better facilitate the clubhouse needs, the Facilities Services Technician will be scheduled to work on Saturdays.
  - c. The Facilities Services Technician will help to support our Landscaping Dept. by handling several routine tasks around the neighborhood such as, blowing off walkways around the clubhouse, pressure washing surfaces around the clubhouse, periodically inspecting MPHOA-owned playground structures for safety, and watering potted plants at the front of the clubhouse.
  - d. Clear communications (in-person, emails, daily log book, two-way radios, and phone calls/texts will be used to help facilitate teamwork.
  - e. Offer to provide coverage for coworkers as needed.
  - f. Continue our rotating on-call maintenance program each weekend.
4. Enhance Appearance and Condition of Clubhouse
- a. Continue to solicit the help of outside contractors and staff for large projects (such as our annual pool PM work).
  - b. Continue touchup painting on a monthly basis.
  - c. Continue to respond to the semi-annual Clubhouse Committee Environmental Audit.
  - d. Incorporate daytime detailing of cardio equipment, more frequent in-house window cleaning along with other deep cleaning needs.
  - e. Continue to utilize outside cleaning contractor for daily clubhouse and PlaySchool cleaning.
5. Ensure an Efficient Use of Departmental Resources
- a. Review and update work order and preventative maintenance systems. Research the feasibility of switching to new preventative maintenance software.
  - b. Create a “Minimum Amount on Hand” reference chart for spare parts and chemicals.
  - c. 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.
  - d. Develop yearly budget and monitor results through monthly review.
  - e. 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.
8. Improve Safety within the Clubhouse – conduct & document monthly evacuation drills and safety meetings, ensure personal protective equipment is ready and available, and assist executive director with updating the MPHOA Emergency Action Plan.
9. 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).

G. 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.
- 2. The team will incorporate the strategies in the 2018 Strategic Plan and commit to working together implement the established strategies.
- 3. The team will work together to establish and collectively agree to adhere to a set of Professional Mt. Park HOA Leadership Team values.

H. 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. Evaluate if more frequent mailings would be beneficial and feasible.
- 4. Work with the website design company to determine if a passcode system to allow member access to more confidential Mt. Park homeowner information (i.e. Committee Meeting Minutes) could be established on the website.

I. Tax Planning

1. Work with new CPA consulting firm and Tax Attorney, if needed, 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 determine the best options for tax filing and to ensure the applicable tests in qualifying for the options are identified and met.