

Mountain Park Homeowners Association  
5 YR Strategic Plan 2018 - 2023  
8/28/2018

**The Mission of Mountain Park Homeowners Association**

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. [Add statement on Values.]

**The Vision for Mountain Park**

**By 2023:**

Mountain Park will be recognized as a progressive and vibrant HOA with a diverse population of members, residents and staff working cooperatively in a healthy and sustainable community to provide a high quality of life.

**Goals and Objectives**

**Goal A. MPHOA will focus on strategic actions to achieve a progressive and vibrant HOA, supporting a healthy and sustainable community thus continuously improving the relative value of our properties.**

**Objective A1: Board and Executive Director will address staffing and office space needs.**

1. Staff will work with the Board to evaluate workforce needs and prepare a two-year projection.
2. The Board and staff will constitute a task force to review future space needs in the Clubhouse and identify options that might be implemented if required.

**Objective A2: Continue to emphasize and improve the quality and appearance of properties in Mountain Park through implementation of standards in Architecture and Home Care.**

1. CC&R Manager will work with the Home Care Committee and Architectural Committee to update, clearly define and communicate policies.
2. CC&R Manager will work with the Home Care Committee to develop a model Enforcement Policy and Fine Schedule. This will be shared with other Committees whose input will lead to a universal process.
3. CC&R Manager and appropriate committees will look at community enhancement programs to support homeowners.
  - a. Neighbor helping neighbor volunteer program

- b. Aging in Place
- c. Others tbd
- 4. CC&R Manager will work with Executive Director and Board to assure adequate staffing is in place to accomplish expectations.
- 5. Executive Director/CC&R Manager/Landscape Stewardship Manager will prepare a plan to educate homeowners on issues related to Homecare standards.

**Objective A3: MPHOA will continue to maintain and improve the common property as a priority investment**

- 1. Landscape Director will continue to develop and implement a plan for Landscape operations and routine maintenance of Common Property.
- 2. Common Property Master Plan Task Force will draft and propose a realistic 5-year Plan.
- 3. The Task Force will host a public meeting to seek input from Mt. Park members.
- 4. Landscape Director will work with the Executive Director and Board to assure adequate staffing is in place to accomplish expectations.
- 5. Strategy and tactics will identify roles for the Common Property Committee, Landscape Stewardship staff and others
- 6. Common Property Committee will continue to refine and communicate to residents the Common Property Policies and Procedures.
- 7. Staff will continue to educate members on common property via the MPHOA website, clubhouse postings, and newsletter as well as seek opportunities to host public meetings

**Objective A4: Continue to maintain and improve the clubhouse facility.**

- 1. Clubhouse Committee will continue to work with staff to refine and communicate the Clubhouse Rules.
- 2. Facilities Maintenance & Housekeeping Departments will define and implement a comprehensive preventative maintenance and Clubhouse cleaning schedule.
- 3. The Executive Director & key Staff will research and recommend to the Reserves Committee and Clubhouse Committee solutions to resolve parking issues for members and staff.
- 4. The Executive Director & key Staff will research and recommend to the Reserves Committee options for improving acoustical issues in the Hawthorn Room and Studios.
- 5. Executive Director & key Staff will prepare an on-going 5-year plan for maintaining and replacing Association assets.

**Objective A5: MPHOA will continually review Clubhouse programs to assure variety and quality that are responsive to community interests and needs.**

1. Staff will track and evaluate clubhouse attendance, including time of day, days of week, and months of the year.
2. Member interest and program evaluation surveys will be implemented by Fitness, Aquatics, KidZone, and PlaySchool on at least an annual basis.
3. Fitness Manager will attend Fitness classes to assess quality of instruction and member participation.

**Objective A6: Maintain an ongoing effort to establish programs of liaison and cooperation with the City of Lake Oswego, Metro and other governments in Oregon.**

1. Executive Director, BOD, and Key Staff will work with, and activate the Mt. Park Neighborhood Association to clarify roles, improve communication and coordinate efforts.
  2. Executive Director, CC&R Manager, and Landscape Director will work with the City of Lake Oswego on programs that benefit the City and Mt. Park i.e. Watershed Program, Fiber Optic Pilot Program, and other projects. Identify key government and other organizations with which to establish relationships and establish liaison with them to influence policies and take advantage of opportunities that benefit MPHOA.
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**Goal B. MPHOA members, residents and staff will cooperatively participate in its governance structure.**

**Objective B1: MPHOA will implement and continuously improve programs to collect information to better communicate critical information to all members and residents.**

1. Executive Director and Key Staff will improve measures to collect and update member contact information.
2. Executive Director and Key Staff will research means to integrate software for greater ease in collecting accurate contact information. [within 12 months]
  - a. Executive Director and Board will develop and update existing policies with priority on:
    - a. Meeting notice policy
    - b. Communication policy
3. Executive Director and Key Staff will continue to refine current communication tools, website, airlock literature, and newsletters.
4. Executive Director and Key Staff will continue to refine welcome packets and key information to members and renters and explore distribution strategies.

**Objective B2: The Board and Executive Director will develop and implement procedures to assure that correspondence and feedback from stakeholders to improve services and governance is used by committees and sub-committees**

**Objective B3: MPHOA will establish and implement an educational forum for and of sub-HOAs to provide a formal link to our governance structure.**

1. Executive Director, Board and Key Staff will coordinate with Sub-HOAs to host educational forum for residents semi- annually. Information to include: history, hierarchy of documents and laws, restriction of what Mt. Park can do, organizational chart, financial and reserve information, common property, architectural standards, homecare standards, clubhouse information, and plans for the future. These should be timed within a couple of weeks from when a printed newsletter is mailed. This will be promoted in the newsletter for optimal attendance.
2. CC&R Manager will host educational forums for Sub-HOA Board and managers every two years and new community managers as needed. CC&R Manager will also host more work sessions for Sub-HOA between the educational forums. CC&R Manager will also educate apartment complex managers as needed.

**Goal C. MPHOA will establish and maintain an ongoing process to identify, plan and implement programs to improve effectiveness, efficiency, safety and sustainability in our community.**

**Objective C1: Under the leadership of the Executive Director, MPHOA will develop a program of training and implementation that will focus on evaluating and continuously improving operations effectiveness.**

1. Strategy and tactics will include operational issues that include creating an information technology Master Plan, data management, core workflows, operations communications, operations space needs and others.

**Objective C2: MPHOA will continue the priority of staff training and effective compliance with fire, emergency, health and safety programs within our properties.**

1. Member Services Manager will develop a plan to update all Clubhouse user waivers and seek staff assistance to implement the Plan prior to September 2018.
2. Executive Director and/or key staff will schedule and implement a risk management assessment of the Clubhouse and PlaySchool on an annual basis or as needed.
3. Safety Committee will refine emergency protocols and complete quarterly drills i.e. Earthquake, Code Blue, and continue monthly fire drills.
4. Executive Director will work with the Safety Committee to develop and implement an Annual safety training schedule for all Staff, Managers on Duty and the Leadership Team.

**Objective C3: MPHOA will fully support education and training programs, as well as other activities that focus on professional development of staff.**

1. The Executive Director will develop a plan for Staff trainings, classes and workshops.
2. The Executive Director will support Leadership training and development. This will include items such as new hire orientation, staff coaching and development, and exit interviews.
3. Engage an outside source to facilitate the Annual Leadership Planning meeting.

**Objective C4: MPHOA will support education and training programs for residents and staff that will improve understanding of issues of interest to the community.**

1. Executive Director, BOD and Key Staff will host educational forum for residents semi- annually. Information may include: history, hierarchy of documents and laws, restriction of what Mt. Park can do, organizational chart, financial and reserve information, common property, architectural standards, homecare standards, clubhouse information – plans for the future. These should be timed within a couple of weeks from when a printed newsletter is mailed. This will be promoted in the newsletter for optimal attendance. [link to A2, A3, A4]
2. The Executive Director and key Staff will develop educational programs for residents. These educational programs may include workshops, forums and expert speakers. [link to A2, A3, A4]

Strategy and tactics will identify topics like pesticide management, earthquake hazard management, landscaping with native plants, bike safety, etc.

3. Explore and initiate interest groups (book clubs, food groups, bridge group) as appropriate

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**Goal D. MPHOA will be widely recognized as a desirable place to live and work that supports a high quality of life in the Pacific Northwest.**

**Objective D1: MPHOA will establish a task force of Board and residents to identify and implement appropriate standards to achieve certification and formal recognition for our association and its components. [within 6 months]**

Once identified, BOD will consult with Leadership regarding feasibility. Strategy and tactics will focus on the departments where this is appropriate (e.g. Play School) as

well as the overall association (e.g. programs to enhance the Common Property or the attractiveness as a “best employer”)

**Objective D2: MPHOA will set a priority on improving our marketing and public relations programs and activities.**

1. Set the foundation for establishing an effective marketing and communications program and develop a method to track effectiveness.
  - a. Conduct a Strengths Weaknesses Opportunities and Threats (SWOT) analysis of our current situation as an HOA
  - b. Collect demographic information of current MPHOA residents via public information
  - c. Disseminate a survey to our residents to determine what our strongest channels of communication are currently and where we are lacking
  - d. Connect with department heads to determine the communication needs of each department
2. Social Media
  - a. Rebrand and revamp current social media outlets to be more useful
  - b. Promote usage of social media to gain followers
3. Electronic and Paper Newsletters
  - a. Establish a template for electronic newsletter submissions
  - b. Enforce a protocol for having articles submitted on a regular date
4. Website
  - a. Continue to refine the website to be a valuable resource of information for all departments
  - b. Research feasibility and review content for information to be restricted to a Member Portal.
  - c. Ensure that the aesthetics of the website are visually appealing as well as easy to navigate for internal residents and external inquirers
5. Free Media
  - a. Establish a plan to promote MPHOA using external media channels.
6. Strategy and tactics will include recognition of the complex set of markets and channels that are important to our diverse community. Social media may be an important opportunity.

**Objective D3: Board will determine objectives and implement an annual employee engagement survey.**

1. Consider using the Gallup Employee Engagement survey and to conduct the employee survey in the Fall or Winter of 2018, under the guidance of the new Executive Director.