

Community Association Fundamentals

EACH COMMON-INTEREST COMMUNITY has its own history, personality, attributes and challenges, but all associations share common characteristics and core principles. CAI developed the Community Association Fundamentals to foster a better conceptual understanding of how associations function and the roles of residents and association leaders.

We hope this primer will help people recognize the core principles at the heart of the community association model and, even more importantly, inspire effective, enlightened leadership and responsible, engaged citizenship.

1. Associations ensure that the collective rights and interests of homeowners are respected and preserved.
2. Associations are the most local form of representative democracy, with leaders elected by their neighbors to govern in the best interest of all residents.
3. Associations provide services and amenities to residents, protect property values and meet the established expectations of homeowners.
4. Associations succeed when they cultivate a true sense of community, active homeowner involvement and a culture of building consensus.
5. Association homeowners have the right to elect their community leaders and to use the democratic process to determine the policies that will protect their investments.
6. Association homeowners choose where to live and accept a contractual responsibility to abide by established policies and meet their financial obligations to the association.
7. Association leaders protect the community's financial health by using established management practices and sound business principles.
8. Association leaders have a legal and ethical obligation to adhere to the association's governing documents and abide by all applicable laws.
9. Association leaders seek an effective balance between the preferences of individual residents and the collective rights of homeowners.
10. Association leaders and residents should be reasonable, flexible and open to the possibility—and benefits—of compromise.

For more information on CAI, visit www.caionline.org or call (888) 224-4321 (M–F, 9–6:30 ET).



PLEASE NOTE: A ✓ IS PLACED NEXT TO TACTICS ACCOMPLISHED BY 2018

Glenshire Devonshire HOA

2016-2018 Strategic Plan



Our Path Forward



BACKGROUND

The Glenshire Devonshire Residents Association Board of Directors created the following strategic planning document in 2014 and then updated it in February of 2016. The purpose of the Plan is to define a set of priorities for the Board and Association over the next two years. Guiding the Strategic Plan are: 1) the Vision, 2) the Mission, and 3) the Guiding Principles. Together, they provide guideposts to help the Board make decisions and the membership understand what drives the decision-making process.

The Board of Directors who created this plan include:

- President, Mike Canney
- Vice President, Martha Frantz
- Secretary, Pam Stock
- Treasurer, Sally Lyon
- Director at Large, Dan Engler

Staff that also participated: Dan Warren (General Manager), Lori Kelley (Admin Assistant)

VISION

Support a high quality, connected, healthy life for all residents.

MISSION

Protect and enhance the quality of life and property in Glenshire Devonshire.

GUIDING PRINCIPLES

1. Maintain all amenities to at least current standards
2. Improve safety
3. Protect our natural environment
4. Consider new or upgrades to amenities if:
 - a. Financially viable
 - b. Supported by members
 - c. Impacts to nature and community minimal
5. Promote healthy living
6. Improve trails and open space
7. Foster an engaged, connected membership
8. Encourage a diverse community that supports the current quality of life
9. Plan for the future with strong financial resources



Relationship between the Vision + Mission + Guiding Principles, kept in check by CC&R's & Legal Requirements



2016 - 2018 BOARD FOCUS AREAS

1. Foster a connected community
2. Plan for the future - balance amenities and other needs with sound finances
3. Improve how Board serves the Association

FOCUS AREA 1: Foster a Connected Community

Goal 1: Understand *who* we serve and what their priorities are to drive Association plans.

Tactics:

- ✓● Survey members at least once per year
 - Conduct community study (demographic/lifestyle info, etc.)

Goal 2: Foster Community Connections

Tactics:

- ✓● Host summer BBQ
- ✓● Expand Association communication programs (Facebook, Next Door, classes)
- ✓● Improve Enforcement Communications
 - ✓● Update standard enforcement letter to include friendlier language
 - Align with how the Board and Staff work with members to resolve issues when they contact us and/or attend meetings



FOCUS AREA 2: Plan for the Future

Goal 1: Communicate long-term needs to support all current amenities (10-year Capital Plan)

Goal 2: Create a strong financial plan to enhance and/or improve current amenities

Tactics:

- ✓● Conduct Reserve Study
- ✓● Create a 10-year Capital Improvement Plan
- ✓● Create a plan to deal with default triggers for existing facility improvement loan
- ✓● Create plan to cover future expenses

Goal 3: Engage members in short- and long-term decision-making

Tactics:

- ✓● Engage members early and often in all major Board decisions
- ✓● Survey members to understand priorities

FOCUS AREA 3: Strengthen the Board + Board Systems

Goal 1: Make Board Meetings More Effective

Tactics:

- Host separate Joint Board + Design Review Committee meeting annually
- ✓● Start at 6 pm
- ✓● Establish Guiding Principles to help drive decision-making
- ✓● Create more robust and detailed Board packets (all material reviewed before meeting)
 - Implement process improvements at Board meetings: topic/clarify/public comment/discuss/decide

Goal 2: Improve Board Systems

Tactics:

- Create Org Chart
- Update + post Board job descriptions

Goal 3: Increase membership attendance at Board meetings

Tactics:

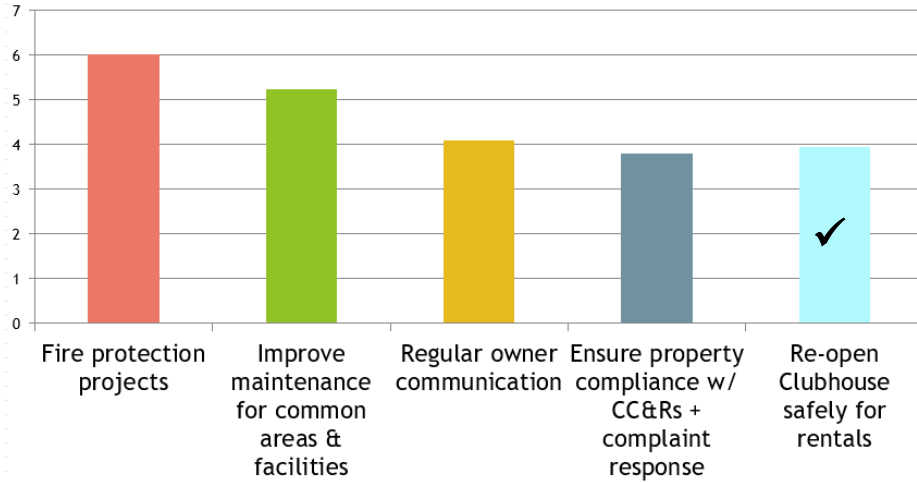
- ✓● Increase signage at Clubhouse and entrances
- ✓● Include “Hot Topic”
- ✓● Expand email lists

Goal 4: Improve Executive Session Meetings

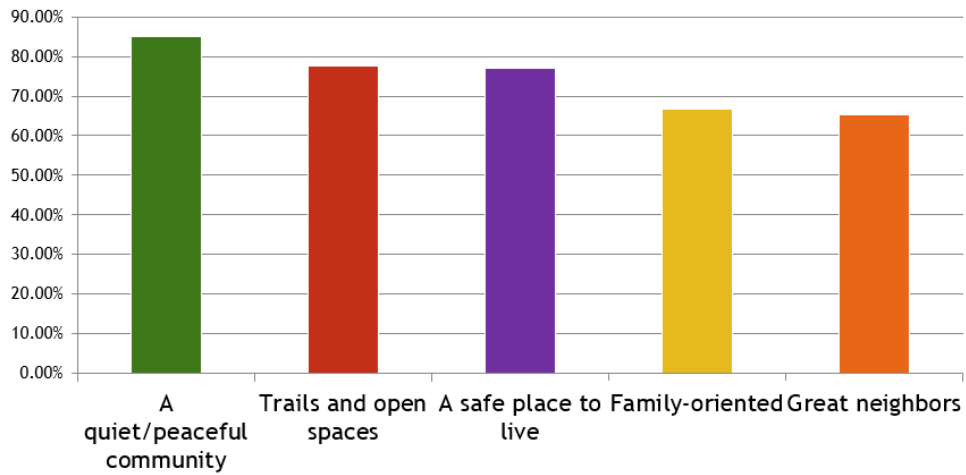
Tactics:

- ✓● Improve process by implementing consent item approach
- ✓● List priorities (Excel format) per parcel
 - Include Brief history per parcel

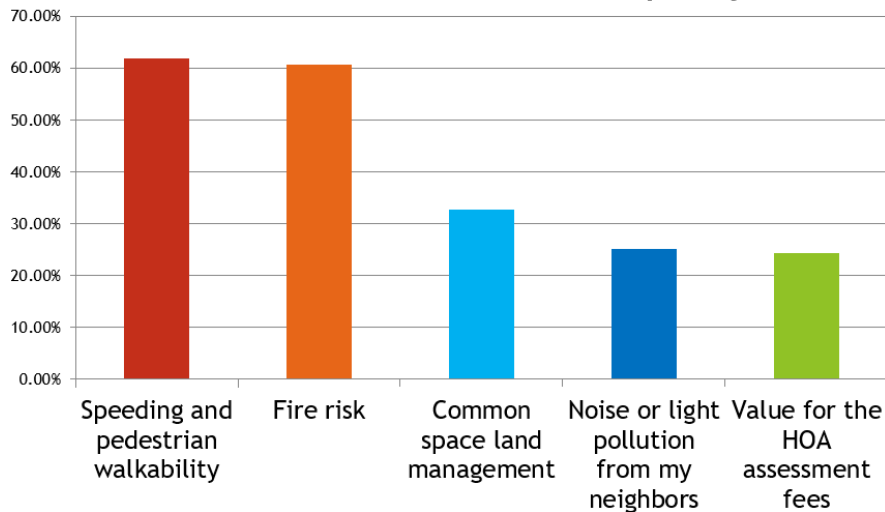
Please rank the following current and potential project areas in order of importance to you with "1" being the highest priority.



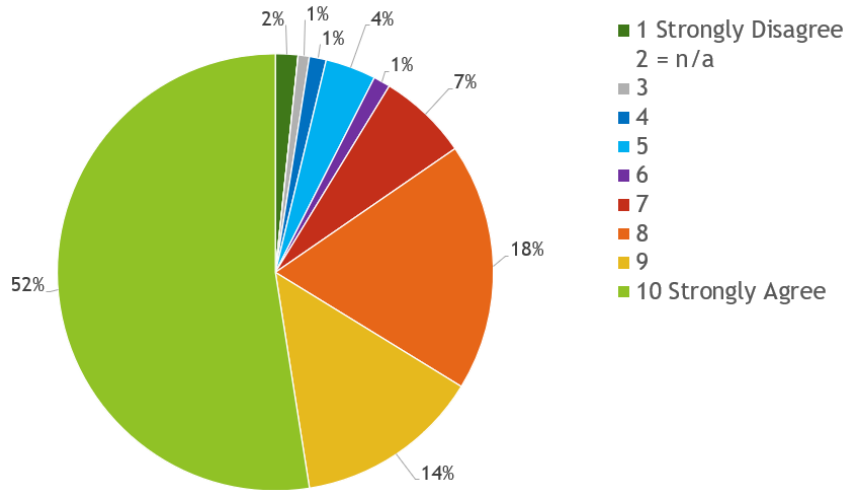
What are the biggest strengths of living in Glenshire/Devonshire? Please select all that apply:



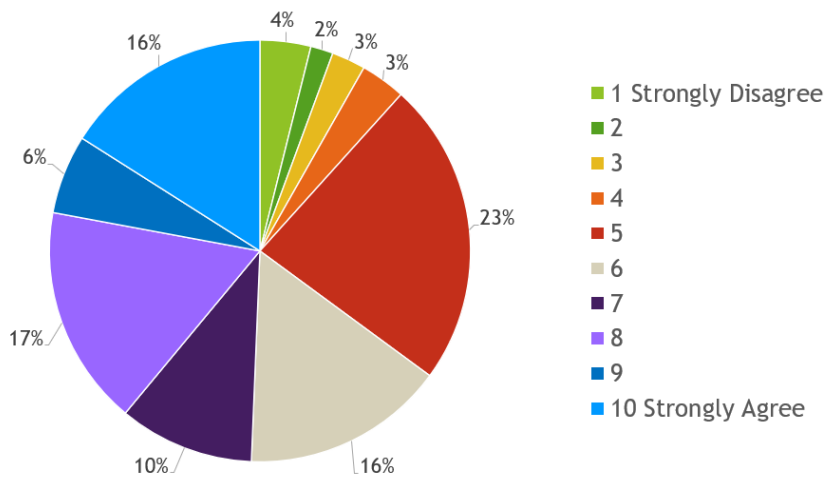
What are the biggest challenges that our HOA faces and should be addressed as a priority?



I would recommend living in Glenshire Devonshire to friends and family



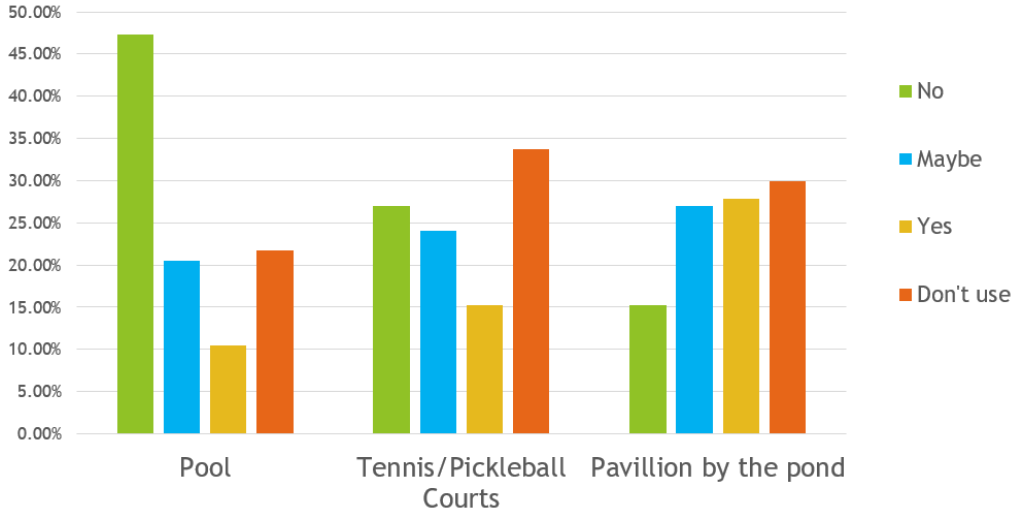
I believe the volunteer GDRA Board of Directors is representing the best interests of the community



Thinking generally about how well you are kept informed about GDRA matters, which statement best describes you?



Would you like to see a reservation system for the following amenities?



I would support an annual dues increase if it meant:

