



Strategic Plan

2021 - 2026

Dreamland Villa Retirement Community (DVRC)

Strategic Plan

2021 - 2026

This strategic plan is dedicated to all DVRC volunteers who have given freely of their time, knowledge and expertise to make Dreamland Villa a great place to live!

Prepared by the Strategic Planning Committee

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We thank you, one and all!

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Executive Summary

The DVRC Board of Directors commenced the development of a strategic plan in 2019 to assess the status of the organization and develop strategies to carry it forward. The planning process examined the mission of the organization and evaluated its systems, operations, processes and culture. Data collection, research and analysis were conducted, as well as a community input process. The resulting plan is a guide for DVRC and reaffirms the organization's commitment to the community as an organization that strives to provide the best possible experience for all its residents.

The Plan

The strategic plan is divided into four main sections: (1) Introduction, (2) Background, (3) Analysis and Assessment, (4) Core Strategies. This approach allows the reader to access specific portions of the document to facilitate ease of access to the information. The plan focuses on essential functions of the organization. These functions include programs, facilities, human resources, capital improvements, financial sustainability, operations and administration.

Mission Statement

Our mission is to offer events, activities and facilities for the enjoyment of our residents and to maintain Dreamland Villa's status as a 55+ age-restricted retirement community."

Since strategic planning allows for "thinking outside the box," it is a safe and nonthreatening means of exploring all available options and to identify opportunities for making necessary changes. The proposed strategies in the plan represent a "laundry list" of ideas and concepts from which to choose. Cost factors, institutional barriers and staffing limitations have not been used as criteria to rule out any strategies. Some strategies may be implemented immediately, while others may require additional funding, changes in policy or other considerations prior to implementation.

What a strategic plan can do is shed light on an organization's unique strengths and its weaknesses, enabling it to pinpoint new opportunities and the causes of unresolved issues. If board and staff are committed to its implementation, a strategic plan can provide an invaluable blueprint for growth and revitalization. This helps the organization determine where it wants to go and to chart a course of action to get there.

The strategies developed during this process are divided into the following eight categories:

Core Strategy Categories	
1. Volunteers	5. Office
2. Committees	6. Financial
3. Memberships	7. Facilities
4. Governance/Administration	8. Maintenance

Upon completion of this strategic plan, an Implementation Plan (IP) will be developed. The IP will condense strategies into goals, objectives and action items. From this, decisions can be made and applicable policies can be developed and implemented.

Key Findings

In general, the key findings of the plan relate predominately to community outreach, management practices, and financial considerations. These key findings highlight the major focus areas which will direct the organization toward the desired outcomes. These focus areas include the following: (1) Conduct an assessment of projected costs for long-term maintenance and capital improvements of the facilities, (2) Build community support, (3) Improve overall management of programs, facilities and operations, (4) Develop protocols for implementing a dues structure and, (5) Prepare a list of project priorities with timeframes and cost estimates.

These key findings and focus areas require immediate attention to address the needs that have

“If you don’t know where you’re going, you will end up someplace else.”

Yogi Berra, former New York Yankees catcher

been identified. Strategies have been developed to help steer the organization toward effective methods and ideas to help address these needs. A combination of strategies and approaches will likely be required to achieve success.

Establish Goals and Objectives to Meet Priorities

At first glance some potential strategies may seem impossible to implement. But, when seen as specific goals and objectives to suit a specific purpose, they become more realistic and manageable. By developing priorities and setting goals and objectives to meet those priorities more appropriate decisions can be made to address simple to complex situations.

By placing emphasis on the critical needs of the organization through the use of goals and objectives to address priorities, much can be achieved. From a strategic standpoint, looking at the future is critical to ensuring that appropriate developments are taking place to achieve necessary outcomes. If the priority is to increase memberships, for example, then specific goals and objectives can be established toward that end.

Strategic Direction

Community involvement is essential for future success. Why is this important to DVRC? The strategic plan directs the organization toward putting members first, creating a long-term vision for the community and improving internal and external communications. Networking, collaboration, marketing, and information gathering are at the heart of this effort. The importance of this cannot be overstated. It is fundamental to the future of DVRC and keeping the community intact.

Through this process, certain challenges were identified. These include:

- Process Challenges
- Cost/Budget/Revenue Challenges
- Human Resource Management Challenges
- Internal and External Challenges



These challenges represent the core of the organizational system. The plan specifically addresses each of these challenges and what influences may be impacting these areas of the organization. Strategies directed at meeting these challenges head-on can provide some helpful solutions and, at least perhaps, some answers to lingering questions.

Next Steps: Planning for Tomorrow, Today

The implementation of new strategies may help guide and facilitate decision-making. However, implementation means that it must be management-driven for change to occur. Unless strategies are put into practice, acted on and are carefully managed and administered, desired outcomes will not likely emerge as planned. Positive change will take effort and determination, but will ultimately provide satisfying results.

Develop a primary focus for what you want to accomplish each year!

Section 1: Introduction

Dreamland Villa is one of numerous retirement communities located within east Mesa, Arizona. The community is governed by the Dreamland Villa Retirement Community (DVRC), a private 501(c) (7) nonprofit organization designated as a social and membership club. The purpose of DVRC is to provide programs for the benefit of its members and to manage the 55+ senior citizen overlay. It is governed by an elected Board of Directors (Board). In an effort to reexamine its identity in a changing environment, it is of value at this time for the Board to evaluate the systems, operations, processes, and culture of the organization and to revisit its values, mission and vision.

In March, 2019, the Board initiated a strategic planning process and formed a planning committee to develop a strategic plan for moving the organization forward. The planning committee met consistently from June 2019 through February 2020 and was comprised of sitting members and contributors. The resulting plan examines all facets of the organization to facilitate planning and decision-making over the next five to ten years. The plan should be revisited and updated as needed.

While intending to promote a positive outlook toward potential change a strategic plan can help guide the organization toward meeting its fiscal and functional obligations and responsibilities. This Plan strongly reaffirms DVRC's commitment to the community as an organization that strives to provide the best possible experience for all its residents. To accomplish this, the plan assesses existing programs and the necessary infrastructure that supports those programs. In essence, the strategic plan will provide DVRC with a "roadmap" for the future.

The strategic plan is divided into four main sections: (1) Introduction, (2) Background, (3) Analysis and Assessment, (4) Core Strategies. This allows the reader to access sections of the plan independently of the other sections to facilitate ease of access to the information. DVRC has no current strategic plan in place. Much of the information and data for this study was obtained from other available sources. Due to the absence of a previous plan and data limitations, certain deficiencies and gaps in the data and information in this plan are evident and are noted herein.

Subsequent to the strategic plan, an Implementation Plan (IP) will be completed. The IP will further condense the strategies into goals, objectives and action items. From the action items, applicable policies, procedures and programs can be developed and implemented. This will facilitate decision-making, policy making and the allocation of resources toward successfully meeting the organizational mission for the future.

During the planning process residents were given various opportunities to provide input through community meetings (coffee talks), at the annual members meeting and through brainstorming

sessions. Other means of communications included a dedicated email address, DVRC website page, flyers and articles. Through the community input process, questionnaires were provided to residents in order to obtain their perceptions, ideas and views regarding the organization and the community. A total of 79 questionnaires were completed and returned at the coffee talk meetings that were geared towards all residents. A separate questionnaire specifically for members was provided at the annual meeting in which a total of 148 questionnaires were completed and returned. To gain a better understanding about the community the two questionnaires focused primarily on the following five key areas:

- Demographic data
- Memberships and Dues
- Board and Board functions
- Communications and Technology Usage
- Activities and Programs

The results from the questionnaires can be found in a separate document entitled, “Strategic Plan Community Input Process,” dated February 11, 2020.¹ The information contained in this document was further summarized in a subsequent document referred to as “DVRC Survey Results, Condensed Version,” February 13, 2020.² Refer to these reports for more detailed information regarding the data collection process and results. Both are available in hard copy and on the DVRC website.

The strategic planning committee considered mailing questionnaires to residents and homeowners to obtain a more representative data sample from the community. This option was not available given the time constraints and funding considerations. Therefore, the information obtained during this process characterizes only a small fraction of the community and is not representative of the total population. Additional surveys will be required to develop a more accurate reflection of the community as a whole.

¹ Strategic Plan Community Input Process,” February 11, 2020

² Ibid.

Section 2: Background

2.1 Brief History of Dreamland Villa

The Beginning Years 1958 – 1978

Dreamland Villa was inspired by the creation of Youngstown, Arizona in the 1950's to provide a community exclusively for persons 55 years of age and over. Although Dreamland Villa was originally intended to become an exclusively senior community, the original Declaration of Restrictions did not provide for it at the time.³ It would not be until much later that this would come to fruition. The name Dreamland Villa was originally proposed by Mrs. Annie Farnsworth from her favorite song, "*Meet Me Tonight In Dreamland*."⁴

Dreamland Villa began when Joe and Ross Farnsworth started construction on two hundred acres of land located at Main and 54th Streets in Mesa. Ground broke in 1958 with a grand opening held in January 1959, at which time home sales began. The first home constructed is located at 5416 E. Akron, becoming occupied on January 15, 1959. Eventually, eighteen sections were constructed between 1958 and 1974, resulting in 2,843 homes and several apartment buildings.⁵ Initially, the community was linked together by the Citizen newspaper, first published in the early 1960's, and through the annual distribution of a telephone directory. Publication of the directory was discontinued in 2019.

On June 1, 1961, Dreamland Villa was originally chartered by the State of Arizona and the Dreamland Villa Community Club (DVCC; aka Club) was officially created. The 1961 Articles of Incorporation stated that the Corporation was organized to provide civic and recreational activities and for other nonprofit purposes. There was no HOA established since HOA's did not exist in Arizona at the time. The Community Club continued to be operated by the Farnsworth Construction Company until 1972 when the assets (then known as Read Hall), were transferred to the Club and a constitution and by-laws were approved by a newly elected Board of Directors. The Board originally consisted of fifteen elected members, in which William Read became the first President of the Board.⁶

The facilities, currently owned and operated by the Corporation, include the Library building, Farnsworth Hall, Read Hall, Nature Trail and associated common areas. The library was initially housed where the DVRC business office is now located. The library was later moved to its present location at the corner of Butte and 55th Streets.

³ "A History of Dreamland Villa Community Club, 50 Years, 1961-2011", Gene Meade

⁴ Dreamland Villa 40th Anniversary Celebration Brochure, Warren Hadley

⁵ "A History of Dreamland Villa Community Club, 50 Years, 1961-2011", Gene Meade

⁶ Ibid.

The development of Dreamland Villa began prior to the eastward expansion of the City of Mesa. Therefore, Dreamland Villa was never annexed into the City, making Dreamland Villa a "county island" within Maricopa County. Dreamland Villa does not receive Mesa city services such as emergency and fire protection. These services are provided by Rural Metro Fire, paid for by individual homeowners.

A separate entity, Help Services, located at 5219 E. University, was established in June, 1973 as an independent, non-profit corporation for the purpose of loaning sick room equipment to the residents of Dreamland Villa and Velda Rose Estates (located adjacent to Dreamland Villa). Help Services is administered by a Board of Directors and utilizes volunteers for its daily operations. These services were expanded in 1978 to provide a free weekly blood pressure clinic for residents; a service that continues to this day. More space became a necessity by the early 1980's and a new building was constructed. In 1989, Help Services was awarded a plaque by Mesa Community College "For Outstanding Volunteer Service, Senior Group".⁷

The Years 1979 – 1999

Maricopa County passed the Senior Citizen Zoning Ordinance on May 30, 1979. On August 4, 1980, Maricopa County designated Dreamland Villa as a zoned 55+ age-restricted community. Since 1980, the Corporation has maintained the records to comply with the age-restriction ordinance. DVCC assumed the responsibility to monitor compliance and began tracking these requirements in 1999.

The Years 2000 – 2020

By 2002, Dreamland Villa was a thriving community of some 5,200 residents.⁸ In an attempt to initiate an HOA in 2003/2004, amended restrictions were recorded for each section. A number of homeowners refused to pay the assessment and DVCC filed a series of lawsuits in an attempt to collect. The trial court upheld the amendments, largely on the basis that the owners bought their lots subject to recorded restrictions that contained provisions allowing for their amendment by a majority vote of lot owners. Therefore, owners knew their obligations could be amended without their personal approval. Both sides appealed certain elements of the trial court's ruling.

The case went to the Arizona State Court of Appeals. The Appeals court handed down a decision against the DVCC on March 16, 2010. In *Dreamland Villa Community Club, Inc. v Raimsey*, 578 Ariz. Rep. 17 (App. 2010), the Appeals Court struck down the amendments on the grounds that those amendments imposed obligations that could not be foreseen by owners when they purchased their lots. It was argued that Dreamland Villa did not have a common area and that none of the recorded restrictions provided for a homeowners association. The Court ruled that

⁷ HelpServicesInc.org Official Website, accessed June 9, 2020.

⁸ Dreamland Villa's 40th Anniversary Celebration Brochure, January 7-12, Warren Hadley.

except for a set of restrictions affecting Section 18, the recorded restrictions did not allow for assessments.

Over the past ten years, since the loss of the court case, DVRC has been rebuilding its financial standing and relationship with the community. The cost of legal battles left DVCC nearly insolvent and put the community in a difficult situation. The lawsuits and in-fighting created major divisions among property owners and mistrust with the Board of Directors. The Board of Directors has struggled with this situation since that time and continues to work toward bringing unity to the community and to fund its legal obligations. Currently, DVRC carries no debt but has limited long-term savings for future needs. After the HOA was dissolved, DVRC returned to a voluntary system of membership dues (fees) for its revenue. All membership dues are paid by residents who wish to become members, but are not obligated to do so. The dues allow members to use the facilities and vote in Board elections.

In 2011, the 50th anniversary celebration was held. In 2017, the name Dreamland Villa Community Club was changed to Dreamland Villa Retirement Community as part of a rebranding effort. In that same year the number of board members was changed from fifteen to seven.

Major Milestones:

January, 1959 - Dreamland Villa officially opened for sales
June 1, 1961 - Dreamland Villa was originally chartered by the State of Arizona
1961 - Dreamland Villa non-profit Corporation was created
June, 1963 - Help Services began
August 4, 1980, Dreamland Villa zoned as 55+ age-restricted community
1999 - DVCC began administering 55+ overlay requirements
March 16, 2010 - Appeals Court HOA decision
January 2011 - 50th Year Anniversary of Dreamland Villa was celebrated
May 19, 2014, Mesa City Council removed the 55+ age restriction for DVRC golf course; the golf course was in private ownership and did not belong to Dreamland Villa
2017 - The number of DVRC Board members was changed to seven
2017 – DVCC was renamed Dreamland Villa Retirement Community (DVRC)

Dreamland Villa continues to this day as one of the oldest of the 55+ communities in the east valley, and within the Phoenix metro area. Preparations are underway to celebrate its 60th Anniversary in January, 2021.

2.2 Organizational Description and Administration

2.2.1 Governance and the Board of Directors (Board)

The Board of Directors is the governing body of the corporation and oversees the operations, facilities and the 55+ overlay designation. It has decision-making powers to set policy and make

necessary choices that guide the corporation. Members of the Board are volunteers, primarily retirees, who serve without compensation. Board members play an integral role in the organization by providing guidance and contributing their own time to the betterment of the community. Most devote many hours as volunteers beyond their commission as board members.

There are seven board members. Four are designated as president, vice-president, secretary and treasurer. The other three are at-large positions. In accordance with the by-laws, board members serve from one to three-year terms, depending on the number of votes they receive during the election. Elections are held each February in which candidates are chosen directly from the membership. Monthly board meetings are held from October through May.

The Board has a fiduciary duty to ensure its members that prudent, long-term business decisions are being made using the best available information. As such, there exists an inherent responsibility to operate the organization using sound business principles. The Board has the responsibility of ensuring that the laws governing nonprofit organizations are being appropriately followed and that the DVRC is carrying out its designated mission.

The primary mission of DVRC is to offer events, activities and facilities to residents, as well as maintain the 55+ overlay. Inherent in this mission is the implementation of necessary actions, decisions and measures that meet the needs of the community. In order to accomplish this the Board utilizes all available resources including committees, office staff, volunteers and maintenance personnel.

Members make up the DVRC constituency and pay an annual fee that provides for the facilities and covers all other administrative and overhead costs. Upon becoming a member, a "kee card" is issued to each individual (not household) and allows each member access to DVRC amenities, including the pools and all indoor and outdoor activities. It also permits members to attend board meetings and vote at the annual membership meeting.

DVRC income is generated from several sources. These include the membership fee, currently at \$175 per person, a one-time Initial Membership Fee (IMF) of \$400 (per household, paid when a home is sold), and a one-time Escrow Response Fee of \$50 per household. None of these fees are mandatory. The recurring annual membership fee of \$175 was waived for up to two residents during 2019 with the payment of the \$400 IMF. Other DVRC income is derived from donations, fundraising and proceeds from special events, entertainment, long-term contracts and rentals. The dues have remained steady at \$175 per person since 2015. The fee was originally referred to as a "club membership fee." It is now referred to as membership fee, or membership dues.

2.2.2 Designation and Requirements of the 55+ Overlay

The U.S. Department of Housing and Urban Development (HUD), Housing for Older Persons Act (HOPA), provides for a discrimination exemption to allow housing developments to be restricted for persons age 55 or older. The administration of HOPA has been delegated to Maricopa County which administers these rules within its Planning and Development Department. Per the by-laws, DVRC has assumed the task of maintaining the records necessary to demonstrate compliance with the HUD/HOPA requirements in order to remain a 55+ age-restricted community. A portion of the membership dues are allocated to the cost of administering the HUD/HOPA and County requirements.

There are exceptions to the HUD/HOPA rule. These fall under the *Under-Age Spouses of Deceased Seniors* exception, allowed by HUD/HOPA and the *Young Adult Restriction*, allowed by county regulations. The *under-age spouses of deceased seniors* exception allows those spouses who do not meet the age requirements to remain in their homes after the loss of a spouse. This is allowed “only so long as the non-age qualified spouse maintains a sole occupant status.”⁹ The *Young Adult Restriction* is written such that no person eighteen years or younger is allowed to reside in any dwelling unit for a period of time exceeding ninety consecutive, or non-consecutive days, per calendar year. This exception is monitored by DVRC, but enforced by the County.

The Federal Government requires that 55+ communities maintain adequate records providing that at least 80% of the housing units contain at least one resident that is 55 years or older. This “80% rule” was established in 1995 by HOPA in which age-restricted communities must conduct surveys at least once every two years. This *Verification of Occupancy* is conducted regularly by DVRC through the use of affidavits. The 80% rule applies only to the people residing at the residence and not to ownership. Although DVRC has oversight responsibility for administering the HUD/HOPA rules, it does not have authority to require occupants to report their age status. This is ultimately the responsibility of Maricopa County. In order to ensure at least 80% compliance, DVRC’s policy is to follow-up with non-responding occupants until all dwelling units have affidavits dated less than two years old.

Each December, Maricopa County sends DVRC a verification form that is completed and signed by the Board President certifying that the community is at least 80% in compliance. The DVRC Property Management System (PMS), “HUD-HOPA Report,” produces a summary of the percentage of addresses in compliance. This report counts renters as well as owner-occupants and identifies all addresses in the database that are included in the Dreamland Villa Subdivision (except those in the City of Mesa). The HUD-HOPA report is posted and made available every December upon request.

⁹ Dreamland Villa Community Club, Administrative Policy and Procedure, rev. 10/11/2016, p.2, Sect. III

The Dreamland Villa subdivision includes 18 sections (1-18, with no Section 13), that DVRC reports on. Temporarily vacant addresses (winter visitors) are counted in the HUD-HOPA report. Vacant, unoccupied addresses (no one living there, for sale, being flipped) are not counted. There are other properties that are not located within the subdivision, but are included in the 55+ overlay. DVRC is not responsible for reporting on these addresses. There are also other residences identified in the DVRC bylaws that are eligible for membership, but are not located specifically within the Dreamland Villa subdivision. Table 1 indicates the percentage of Dreamland Villa households in compliance with the 80% Rule for the last three years.

Table 1: HUD-HOPA Compliance

Year	Percentage
2017	92.45%
2018	92.76%
2019	91.45%

Should the records ever be audited by HUD, or should a third party bring suit claiming that Dreamland Villa (the subdivision, not the corporation) is not in compliance with the age-restriction requirements, the subdivision could permanently lose its 55+ age-restricted status if at least 80% of the units are not in compliance. In this case, since Maricopa County is the governmental entity with oversight they would be the actual responsible party.

The resources needed by DVRC to provide oversight, tracking, recordkeeping, recording and other administrative duties to ensure that the 55+ requirements are met is time consuming and costly. The DVRC business office manages this obligation.

2.2.3 Board Committees

Twenty-three standing committees have been established by the Board. Table 2 provides a list of the current committees and their status. The intent of committees is to enhance the productivity of board activities and responsibilities. Committee descriptions can be found in the DVRC Policies and Procedures Manual.¹⁰ Committees typically consist of a chairperson and several members, of which the president is a non-voting member. Committee chairs are tasked with providing a monthly report at board meetings. Ad hoc committees are formed for specific tasks on an as needed basis.

In addition to their obvious functions, the committees also perform internal and external roles and functions. Internal functions apply to committees that do not directly focus on producing income, or specifically promote the organization; such as neighborhood watch, kee card and personnel committees. Examples of committees with a more external focus are the resident sales

¹⁰ DVRC Policy and Procedures Manual, adopted 5/11/04, updated 10/11/17; Committees pg. 1 -6.

& marketing and fundraising committees. This is relevant when assessing the effectiveness of the committees, which will be further discussed in Section 3 of this report.

The committees play a significant role in the organization since they perform many functions. Committees offer three main benefits: knowledge specialization, division efficiency and accountability. Information sharing among and between the committees and the board is crucial to the efficiency of the organization. The types of committees and the committee structure must be relevant to the DVRC mission to be effective. The number of members, quantity and quality of committee meetings, committee output and the committee structure dictates committee functionality, both independently, and as a group.

The committees and their responsibilities are directly correlated with the ability of the Board to effectively manage them. The more informed committees are about the organization, the better job they can do. This information is important since the committees must have a basic understanding of their role in the organization. The knowledge and awareness of committee members builds confidence and allows for the exchange of information critical to committee success. Most of the committees have essential functions, such as Finance and Budget, Fundraising, and Web Oversight, to name a few.

Table 2: List of Standing Committees* (as of 3/29/19)

#	Committee	Status
1	Advertising	Open
2	Buildings and Grounds	Maintenance
3	Compliance	Active
4	Contracts	Active
5	Farnsworth Hall	Active
6	Finance and Budget	Active
7	Fundraising	Open
8	Hobbies, Crafts & Indoor Activities	Open
9	Kee Card Renewal	Active
10	Kitchen Sub-committee	Open
11	Library	Closed
12	Memory Brick Garden	Active
13	Nature Walk Maintenance	Active
14	Neighborhood Watch Program	Active
15	Outdoor Recreation Activities	Open
16	Personnel	Active
17	Policies and Procedures	Active
18	Resident Sales & Marketing	Open

19	Strategic Planning	Active
20	Veterans Day	Open
21	Volunteer	Active
22	Website Oversight	Active
23	Welcoming Committee	Active (kee card only)

Note: *Open* means there is no committee chair

2.2.4 Volunteer Program

Volunteers are essential to the mission and overall success of DVRC. Volunteers fill critical roles and could be considered the backbone of the organization. Without volunteers, programs would become more limited, or cease to exist altogether. As an asset to the community, volunteers reduce the costs of DVRC services by contributing their time, skills, and passion. Additionally, because of their direct contact with the greater community, volunteers also become ambassadors for the organization.

As members of DVRC, volunteers are also key constituents. They desire success for the organization and for a thriving and prosperous community. Through their efforts, volunteers want to feel connected and valued and often look to volunteerism as a way of developing meaningful relationships. DVRC utilizes volunteers for a wide variety of duties and responsibilities, from organizing events to providing office assistance. The current number of volunteers utilized by DVRC on a regular or occasional basis is unknown.

The method employed by DVRC to utilize volunteers is primarily through the use of a call list. Volunteers are often called upon by phone, based on an immediate need. This is done through the use of a ledger/notebook maintained by one individual who takes on the responsibility for updating and maintaining the list for the community. This individual is also responsible for ensuring that volunteers who handle food have obtained a food handlers certificate. Management of the list is problematic since it must be handed from one person to another to take it over when they no longer want to be responsible. Few people are willing to assume the job of managing the volunteer list. The volunteer program will be further discussed under Section 3, Analysis and Assessment.

2.2.5 Memberships

Currently, there is no data available regarding resident population and the number of residents per household living in Dreamland Villa. This information would be helpful to improve the database and gain a better understanding of the community, especially pertaining to memberships. DVRC is dependent on members for income and to become involved in the organization. Memberships form the foundation of DVRC and are essential to its continued existence. Table 3 reflects the number of paid memberships over the past five years, which indicates an average of 2,002.2 members out of the 2,843 homes. Since 2011 there has been an

overall decline in memberships. In 2011 DVRC recorded 3,694 members. This represents a drop of 1,692 memberships between 2011 and 2019.¹¹ This is significant.

The more residents that support the organization, the better DVRC can serve the community. Since the HOA was dissolved, the community has been divided into two “camps”: members and non-members. This division is an interesting phenomenon and remains a sensitive and controversial matter. Gaining a better understanding of the rationale used by residents to decide whether or not to become members would provide useful information to DVRC. It is costly to operate the facilities and administer the 55+ overlay. It goes without saying that DVRC has the same expenses whether residents pay dues or not. It is believed that some residents are possibly misguided, misinformed or unaware of the direct connection between the dues and the costs associated with administering the 55+ overlay and the facilities.

Residents who choose not to pay because they don’t use the pools, for example, are not linking the cost of the amenities with the benefit they receive from the 55+ overlay. This attitude creates an inverse relationship and is costly to the community in any number of ways. The 55+ overlay adds value to homes, provides an intrinsic value to residents and ensures continuity within the community, among other things.

Table 3: Paid Memberships

Year	Memberships
2015	2,085
2016	1,906
2017	2,000
2018	2,120
2019	1,900

DVRC is committed to developing and implementing innovative methods of attracting new members and retaining its existing members. Undertaking this strategic planning process is part of that effort. Other methods to achieve this goal include such things as office initiatives to improve online communications, reaching out to new residents and initiating online payment methods. Directing the organization toward strategies that emphasize membership will significantly guide the organization forward. Community outreach to educate residents about DVRC is also an important component of this approach.

2.3 Mission, Vision and Values

2.3.1 Mission Statement

¹¹ Citizen Paper Article, April 2016, by Ward Jennings, Board Treasurer

Organizations that consistently express their mission, vision and values are generally the most successful. By placing emphasis on the ideals and standards established by their mission, vision and values, an organization demonstrates a commitment toward meeting their established principles through its policies and actions. The internal processes that drive the DVRC mission forward are influenced by critical programs and functions, such as fundraising, memberships, committees and volunteerism.

DVRC Mission Statement:

“Our mission is to offer events, activities and facilities for the enjoyment of our residents and to maintain Dreamland Villa's status as a 55+ age-restricted retirement community.”

The strategic planning committee reviewed and discussed the current mission statement. Various alternatives were debated; however, no consensus was reached to make changes at this time. Firstly, there is a need to answer some important questions before this can be done. It is evident that a major question to be asked is, “How will DVRC successfully meet its mission in the future”? In order to adequately answer this, further information is needed. For example, if financial support declines over the next 3, 5 or 10 years, what impact would this have on the organization? “How does DVRC intend to respond”? The types of questions asked, and the responses given, will help provide the necessary information to more accurately reflect the needs of the organization before modifying the mission statement.

DVRC has a need for consistent and reliable support, both financial and nonfinancial. This suggests that the mission statement must reflect this. Since community support and involvement is necessary for DVRC to operate at an acceptable level, any changes to the mission statement must address DVRC’s future role in the community. Continued discussions and input from the community are needed to better understand the levels of connectivity between the community and DVRC.

2.3.2 Vision Statement

DVRC currently does not have a vision statement. The strategic planning committee discussed a number of possibilities to represent the organization’s vision of the future. Without a vision statement it is difficult for the organization to develop goals and objectives that fall in line with implementable strategies to meet future needs. A vision statement would help answer the question, “What do you hope for your organization and its members?” Inspirational statements can provide the necessary impetus and ideas that can significantly benefit the direction that the organization takes in the future.

2.3.3 Values Statement

A values statement portrays the priorities for how the organization goes about carrying out the activities and programs that define it and are shared by members, staff and volunteers. The standards, norms and attitudes reflected by the organization also affect those who come into contact with it. A values statement should be referenced regularly as a sense of pride and to give direction within the organization. DVRC does not currently have a values statement. It is suggested that a values statement be developed since a positive values statement can have a direct influence on the culture of the organization.

2.4 Facilities and Infrastructure

DVRC facilities and infrastructure can be divided into the following four categories:

- Farnsworth Hall (building interior, building exterior (pool, hot tub, parking lots, sidewalks)
- Read Hall & office complex (interiors and exterior areas, including pools, hot tub, outdoor activities, sidewalks and parking lots)
- Library building
- Nature Trail

2.4.1 Farnsworth Hall

Farnsworth Hall (Farnsworth) is the community's auditorium where numerous events and activities are held. It is open to the general public and made available for rent to private parties for special use. With a seating capacity of 550 persons, the hall contains a kitchen, stage and an outdoor band shell. Events such as spaghetti dinners, pancake breakfasts, potlucks, special occasions, concerts, dances and dance lessons are held there. The grounds contain a large swimming pool, hot tub, horseshoe pits and bocce ball courts. Farnsworth is used primarily during the high season from October through April, although some rentals and events occur during the off-season.

The exterior of the hall is distinctive and has remained essentially the same since it was constructed and has been well maintained. The interior of the hall is unique and obviously holds within its walls many memories of the community's long and rich history. The kitchen is small and antiquated, but functional for most community needs. The kitchen underwent a renovation in recent years when \$20,000 was raised in a fundraising effort. Other improvements have consisted primarily of minor updates and repairs.

The flooring was replaced in 2019 due to an unforeseen water line break (paid for by insurance). An outside band shell, located at the west end of the building, was recently updated by DVRC volunteers. The band shell is used for various outdoor events during the high season. Using 2019 figures, revenue raised from activities, events and rentals was approximately \$32,000. The 2019-

20 season was an off-year due to the need to replace the flooring and the corona virus pandemic that began in early 2020, at which time all events were cancelled.

2.4.2 Read Hall

Read Hall is a complex of two main buildings that house the DVRC office and indoor activity rooms. The exterior grounds contain the outdoor activity areas, including two swimming pools, hot tub, pickle ball courts and a shuffleboard court. The hall itself contains one large room, three smaller activity rooms, a kitchen area, workout room, billiards room and two auxiliary rooms (green room and the woodcarver room/ticket office). The DVRC office and indoor activity areas are identified as Rooms A – B, with identifying room numbers. The complex is primarily used during the high season from October through April, except for the office which stays open all year long.

The Read Hall complex is antiquated in its general appearance, but does retain the architectural style that reflects the period of its construction. Photos from the period illustrate a typical 1960's look and character. Over time minor alterations have been made, particularly to the grounds, such as brick fencing surrounding the pool area and the addition of the memory brick garden.

Portions of Read Hall have been remodeled by volunteers in recent years. The area that contained the small, on-campus restaurant (John's Villa) was modernized when the restaurant permanently closed. The restaurant area received new flooring and paint, an updated kitchen area and remodeling of three adjoining activity rooms in which tables were added for social gatherings. The exercise room was also remodeled to accommodate additional gym equipment. Other parts of the complex including the office, billiards room and restrooms have not been remodeled. The A and B activity rooms, pool area and surrounding grounds receive routine maintenance.

A number of activities and events are held at Read Hall. These include board meetings, community events, meetings, pot lucks, seminars, and social gatherings. Regularly scheduled activities; including the quilt group, singles club and Tai Chi are also held at the hall. Specific rooms are available as rentals to private parties for a fee.

2.4.3 Library

The library was closed in April, 2020. The library building itself is a stand-alone structure located near the pickle ball courts and was originally a single family home that was donated for use by the community. The building has also been utilized as office space for the Dreamland Villa Posse.

Until its closure in April, 2020, the library catered specifically to DVRC members and contained a nice selection of works of fiction, novels and literature relevant to the users. The library also

stored the historic record of DVRC and the community. Although it had a loyal following, patrons had been on the decline in recent years and there was no longer a need for volunteers to serve or to manage its resources. With online book availability and access to near-by libraries in the area the library had essentially become obsolete. The building will likely be repurposed for a different use in the near future. The 2019 cost to operate the library was approximately \$1,500.

2.4.4 Operations

The term *operations* refers to the office and maintenance. The office manages the day-to-day business, while maintenance operations include those activities necessary for the care and upkeep of the facilities, grounds and equipment. Operations are the backbone of any organization and require the resources necessary to effectively manage and support these important functions. Office and maintenance personnel work closely together since their responsibilities are often intertwined. Effective management of the office and maintenance is important to the overall health and proper functioning of the organization.

Office Management

The office staff consists of a full-time office manager, full-time receptionist and two part-time bookkeepers. Office responsibilities and procedures include maintaining records, taking phone calls, answering questions, addressing community concerns, accounting and fiscal management, providing necessary support to the board, volunteers and committees, customer service, annual mailings to residents, administer recordkeeping for 55+ compliance, collecting dues and payments, attending board meetings, assisting with programs, activities and other community functions.

The importance of maintaining a stable and efficient office is fundamental to the operations of the business. Any interruptions in office operations can place a significant burden on others within the organization and can impact services to members. Office efficiency requires knowledgeable staff to provide the services and functions necessary to benefit the membership and the organization. In reality, the office staff is the “face” of the organization since it is often the first contact and interaction that residents have when moving into the community.

The office has been making significant progress with office improvements. These improvements include technological advances, streamlining office functions and improving customer service. New online systems such as online dues payment options, online ticket sales and email blasts for events and announcements are being implemented to improve efficiency, cost-effectiveness and the overall member experience.

Two of the principal responsibilities of the office are administration of the 55+ overlay and the management of the annual dues process. These take priority within the office since they are critical functions. There is a significant compliance cost to administering both of these programs due to the amount of administration and human resources required. The busiest time for the

office is during the active season when winter visitors are returning. It is at this time that the annual dues renewal notices are sent to members, Kee Cards are distributed and other related duties are performed. Dues payments are made payable by the end of each calendar year, with a 30-day grace period that extends to January 31st. It is also at this time that the office prepares for the annual membership meeting, held once annually, in January.

The office remains vigilant about maintaining the 55+ overlay and performs many useful functions in regard to this activity. The office staff monitors home sales, and scours local real estate listings. Every real estate agent with a house on the market is requested by the office to state in their public remarks that this is a 55+ community with an association that provides amenities and works to preserve the 55+ status. After homes are placed in escrow, the office works with the title companies to ensure that age affidavits are completed and the processing of DVRC payments are completed. The office tracks homes that are sold and contacts all new owners who have not yet submitted their age affidavits. Many hours are spent to ensure that the community stays within compliance of the 55+ rules.

There are often reports of people living in the community who have under-age residents living in the household. This situation is dealt with by the DVRC compliance committee. Any member of the community can submit a complaint about such a situation at the office and the compliance committee will look into the matter. For residents who are not members, they may contact Maricopa County directly. It is Maricopa County that has the ultimate authority to evict any persons not in compliance. All of these efforts, among others taken by the office and the compliance committee help keep the 55+ overlay intact.

The office maintains important documents and manuals necessary for operating the business and is the storehouse for these and other records. It is necessary to have critical information readily available and updated regularly with easy access for members, volunteers, office staff and the Board. Proper office QA/QC protocols are also important for data security and safekeeping. The following manuals are currently located in the office:

Office Manuals
Policies and Procedures Manual
Uniform Personnel Policy Manual
Accounting Manual
Front Desk Procedures Manual
Box Office Procedures Manual
Office Volunteer Procedures Manual
General Information Binder (containing legal information & documents)

Maintenance Operations

Maintenance operations and functions include facilities management, preserving infrastructure and conducting routine maintenance duties. Maintenance personnel include a volunteer supervisor (also currently serves on the Board of Directors), two full-time paid employees and one part-time paid employee. Maintenance salaries paid to employees in 2019 totaled \$69,096.70.

The facilities maintained by the maintenance crew include all assets owned by the DVRC Corporation (except the Nature Trail). Routine maintenance includes, but is not limited, to the following responsibilities:

Routine Maintenance Responsibilities:

Oversee and conduct maintenance on indoor and outdoor facilities and infrastructure
Training and supervising of maintenance personnel, contractors and oversee projects
Provide janitorial services and cleaning
Prepare schedules, cost estimates and locate qualified contractors for maintenance projects
Set up and take down before and after events
Interior and exterior painting, minor roof repairs, preventative maintenance
Minor plumbing and electrical
Carpentry
Vandalism repairs
Minor building modifications
Grounds maintenance, weed and pest control
Outdoor lighting and security apparatus
Fences, gates and doors
Ceiling tile
Minor renovations
Pool and hot tub maintenance
Kitchen inspection

The following maintenance duties are performed by contract or vendors:

Swimming pool chemicals and ongoing pool maintenance by certified pool technicians
Fire extinguisher testing
Magnetic card reader maintenance
Projects beyond the scope of routine maintenance activities

Funding for maintenance is separated into two separate categories between the pools and spas and routine maintenance activities. Maintenance projects that cost under \$3,000 comes from the maintenance “budget,” which is part of the operating budget. If a maintenance project is over \$3,000, and is an enhancement rather than purely maintenance, it is considered a capital expenditure. If a maintenance project is over \$3,000, but is considered upkeep (not

enhancement), the funds come from the maintenance portion of the operating budget. All normal operating expenditures include maintenance costs.

The future costs of maintenance and office administration need to be considered when making decisions about managing funding allocations. This is significant since these costs will only continue to increase over time. The continuation of efficient and cost-effective business and maintenance practices is crucial. Office and maintenance operations comprise a large portion of the DVRC budget and impact nearly every aspect of the organization. This is particularly true regarding the relationship between operations, the facilities and programs.

2.5 Programs

Programs are provided as a service to residents in the community and are the primary mechanism by which residents participate in the organization. DVRC programs consist of the following:

- Indoor and Outdoor Activities
- Entertainment
- Special Events
- Library services (closing in spring, 2020)

Programs comprise an important element of the organizational structure and are inextricably tied to its mission. This requires that the organization periodically evaluate program content in order to assess effectiveness, usage and value to the membership. The programs are described below.

2.5.1 Indoor and Outdoor Activities

As in any adult community, activities are a highly desired amenity. Although it is not a legal obligation to provide activities to its membership, it is highly unlikely that many residents would participate if activities were not offered as part of their membership package. DVRC provides a variety of indoor and outdoor activities for the benefit of its members. A complete list of the activities is provided in Table 4, page 19.

DVRC activities are wide-ranging in scope and may be held either on campus or off. Most indoor activities occur at the Read Hall complex, including woodworking, card games, quilting and photography and woodcarving, to name a few. The off-campus activities include bowling, golf, walking and hiking groups. There are several clubs that meet on a regular basis. These include the Computer Club, Singles Club and the Minnesota Club.

In addition to the indoor and outdoor activities, events are also held at both Farnsworth and Read halls. Some events are recurring, while others are occasional or one-time occurrences. Recurring events include such things as pancake breakfasts, potlucks, happy hours, special fundraising dinners and an annual Veterans Day celebration. Occasional events are such things as craft fairs,

activity fairs and open houses. One-time occurrences are generally special events such as a DVRC anniversary celebration.

The community is also fortunate to have the Desert Nature Walk (trail) that is located within the power easement between Colby and Decatur Streets and from Higley Road through the 6000 block of Colby and Decatur Streets. The trail has been deeded to DVRC in perpetuity and is a unique and exceptional asset to Dreamland Villa. The trail is popular among residents and receives extensive use. It is maintained by volunteers who conduct an annual clean-up day to help keep it free of trash and overgrowth. The Board of Directors has adopted rules and regulations with the intent of maintaining the Nature Walk in its most natural state while giving consideration to accessibility, hazards, cost of maintenance, member's desires to protect the land from other usages, and to permit the use of the land for the purpose of enjoying the vegetation and wildlife. Specific language can be found in the DVRC Rules and Regulations.¹²

Responses received from the questionnaires at the annual meeting provided information about the activities. Respondents were asked to identify the activities they enjoy or use the most. These results are shown in Tables 5 and 6. Table 5 indicates the results of the top ten activities cited by members. The list in Table 6 represents other activities in order of rank by the number of responses received. This information is relevant since it is the only current data available regarding the activities. Additional data would be helpful to further determine what changes might be needed with regard to current and future offerings.

In order to attract new members and increase memberships, DVRC must periodically evaluate its programs to determine necessary changes and upgrades that might be needed. As reported by those interviewed during this process, it is generally recognized that attendance at many of the indoor and outdoor activities has been on a general decline in recent years. Further study and analysis of this would be helpful to assess the actuality and potential implications of this.

The community input process brought forth a number of suggested activities and ideas that members would like to see implemented. A list of these ideas and suggestions is provided in Table 7. Enthusiasm among members for additional programs, activities and events is often difficult to achieve due to numerous factors. In many cases there simply are not enough volunteers to make this happen, especially on a regular basis. Additionally, Dreamland Villa is a diverse community with ages ranging from 55 on up. Providing activities that appeal to the various age groups can be a challenge.

Other challenges with this involve the following considerations: (1) Those who are still working and unable to attend activities and events during weekdays, (2) Those who are not single, but want to participate in similar activities that the Singles Club provides, (3) Those on fixed

¹² DVRC Rules and Regulations, dated 12/24/18, Section C, Nature Walk, pgs. 5-7.

incomes who are unable to engage in higher cost activities, or numerous activities, (4) There is a concern that some events and activities take away from other DVRC events and activities, (5) Schedule events and activities at various times to allow those who do not go out after dark to still participate, (6) Many members want more activities to occur during the summer months. Each of these considerations is important to include in future planning efforts.

Table 4: Regularly Scheduled Campus Activities (October – April) * During High Season

Activity	Building/Location	Avg. Number of Attendees*	Cost/Fee
Computer Room	R-9, Bldg. A	1 – 6	\$15/yr. \$20/couple/yr.
Art Room	R-5, Bldg. B	1 – 8	Charge for classes
Fused Glass	R-7, Bldg. B	5 – 10	Charge for supplies
Poker	R-8, Bldg. B	5 - 15	No charge
Library	Library Bldg.	1 - 5	No charge
Quilting	Read Hall	5 – 10	No charge
Cards & Games	Read Hall	8 – 12	No charge
Singles Club	Read Hall	10 – 15	\$15/yr. per person
Bocce Ball	F. Hall (outside)	2 - 6	No charge
Pickle Ball	Read Hall (outside)	4 - 8	No charge
Line Dancing	F. Hall	25	\$3 per session (members)
Woodshop	R-10; Bldg. A	5 - 10	No charge
Aquacise	Read Hall pool	8 - 10	\$8/month
Woodcarving	R- 3, Bldg. B	1 - 5	No charge
Ceramics	R-7, Bldg. B	3 - 8	Supplies
Billiards	R-4, Bldg. B	2 - 6	No charge
Shuffleboard	Read Hall (outside)	N/A	Inactive
Horseshoes	F. Hall (outside)	N/A	Inactive
Exercise Room	R-4; Bldg. B	10 per day	No charge
Lapidary	R-6; Bldg. B	12 - 15	Supplies
Quilling	R-7, Bldg. B	1 - 5	Supplies
Tai Chi	Read Hall	4 - 10	Small charge for classes
Happy Hours	Read Hall	10 +	No charge
Corn hole	F. Hall	2 - 6	No charge
Pancake Breakfast	F. Hall	100+	\$5/person
Minnesota Potluck	Read Hall	Varies	No charge
Community Potluck	Read Hall	Varies	No charge

Off-Campus Activities

Bowling	Off-campus activity	50 +	\$12/week
Golf League	Off-campus activity	2 - 8	No charge
Hiking group	Off-campus activity	10+	No charge
Walking Group	Off-campus activity	10+	No charge

Table 5: Popular Activities by Rank (Top 10)

Rank	Activity/Program	# of Respondents
1	Swimming pools	71
2	Entertainment	55
3	Cards, bunko and card bingo	40
4	Pancake Breakfast	34
5	Exercise Room	20
6	Dinners, including potlucks	19
7	Woodshop & High Tea	14 (tied)
8	Singles Group & Hiking Group	14 (tied)
9	Computer Room	11
10	Pickle ball	10

Table 6: Popular Activities by Rank of 9 or Less

Activity/Program	# of Respondents
Hot Tubs	9
Library	9
Fused glass	9
Bocce Ball	9
Walking Group	8
Lapidary	8
Coffee social	7
Poker	6
Golf	6
Art Room	5
Ceramics	5
Nature trail	5
Quilt club	5
Happy Hours	4
Shuffleboard	4
Bowling	3
Cribbage	2
Tai Chi	2
Book club	1

Table 7: Other Activities Suggested from the Community

Indoor flea market
Weekender Trips; “ <i>Sumfun</i> ” Club
Long-range Bus Trips
Once a month speakers – police, sheriff, motor vehicle, county, etc.
Karaoke
Cooking Classes
Massage – chair and table, once a month, neck and head massages
Picnic Tables, benches and trash barrels
Bulletin Board with for sale notices, help wanted notices, etc.
Plays and play reading – performance of a play by a group of readers, dramatic or musical entertainment
Brown Bag Lunches
More summer-time events
Replace shuffleboard courts with shelters for picnic tables, a tiki bar, and serving area for picnics and happy hours and get-togethers
Movie nights/afternoons with popcorn
Ice cream socials
More dances and programs at Farnsworth Hall, afternoon and evening
Have a Neighbors-Helping-Neighbors program for cleaning yards and other similar deeds
Have more opportunities &/or classes for crafts such as knitting, crochet, scrapbooking, etc.

2.5.2 Events and Entertainment

There is a distinction made between the terms “events” and “entertainment”. They are distinguished from each other in the way they operate. Entertainment is primarily overseen by the Entertainment Committee and consists primarily, although not exclusively, of events held at Farnsworth Hall during the high season. Typically, entertainment involves musical performances and concerts and special member events. “Events” do not generally fall under a specific committee and are typically held by individual volunteers who host events of their choosing, usually for fundraising purposes. These events include such things as the annual high tea, craft fairs and volunteer appreciation events. Individual clubs also hold their own events, such as potlucks, the Singles Club’s annual 4th of July BBQ and the Computer Club’s annual electronics recycling event.

2.5.3 Library Services

This program will no longer be available. The library closed in April, 2020.

2.6 Financial Framework

The strategic plan includes a review of the general financial framework of DVRC and provides strategies to address fiscal and budgetary needs over the next five to ten years. More specific long-range financial calculations will be developed in a subsequent implementation plan. The DVRC financial framework consists of office and maintenance operations, facilities, salaries and

programs. Income sources are generated from membership fees, IMF fees, Escrow Response Fees, donations, fundraising, events, rentals, long-term contracts and other minor sources. The primary income stream is produced from membership dues.

DVRC income is placed into two separate accounts: The Capital Expense Account (money market account for capital improvements) and the Checking Account (general fund and restricted funds). At the end of each month 10% of the annual membership dues collected are moved from the checking account to the money market (capital improvement) account. The Board may elect to move other money into the money market account at any time. Once moved, these funds are used for capital improvements. Restricted funds are earmarked for a specific purpose and are typically funded by volunteers who generate the income, usually from fundraisers. Restricted funds are placed in the checking account. See restricted accounts in the DVRC budget for more specific information. Currently, there is no established policy pertaining to the use of the restricted accounts (see strategy section).

Two separate budgets are prepared annually; the General Fund budget (operating income and expenses) and the Capital Expense budget (capital improvements). 10% of the annual fees go into the capital expenditure fund and transfer fees go into the operating budget. Once funds are placed into the capital expenditures account they cannot be moved into the operating expense account unless there is Board approval to do so. Typically, unused excess funds at the end of the year go into the capital fund, with minor exceptions.

DVRC uses an incremental budget process in which annual budgets are based on the calendar prior year. Operating expenses and income are adjusted for known or expected changes anticipated in the budget year. Capital expenses are those expenses that cost over \$3,000 and make improvements (not just maintenance). Capital expenses include the money spent on acquiring or maintaining fixed assets, such as land, buildings, and equipment (tangible items that have a life expectancy of greater than one year, typically).

The average per member cost of operating DVRC annually is approximately \$240 per person (member). This is based on the average of 2,000 members over the past six years of data and assumes that operating costs are coming specifically from membership fees and not from any other income source. Determining when, and by how much, to increase membership dues is a continual concern by the Board. Under DVRC's policies and procedures, dues may be increased if approved by a vote of the membership if an increase is over 10%. If the increase is under 10%, the Board of Directors can make the decision. There was a motion to increase the dues 10% in 2019, but that motion did not pass in order to further analyze the DVRC financial position.

For year ending 2019, DVRC gross income was \$436,646, with total expenses of \$415,614 and a net cash income of \$21,042. Table 8 provides a breakdown of DVRC income for 2019, as a

percentage. This table indicates that 77% of income is derived from memberships, 14% from donations, rentals, entertainment and fundraising. Other income, including the cell tower (a long-term agreement) represents 9%.

Table 8: DVRC 2019 Income Sources by Percentage

Income Sources (2019)	% of Total Income
Membership Fees	68%
IMF	9%
Donations	2%
Rentals	4%
Entertainment	6%
Fundraising & Kitchen	2%
Cell Tower contract	3%
Other (misc.) income	6%

Average operating expenses (using 2013 - 2019 data) are provided in Table 9. According to the data, the total annual average for expenditures is \$455,400. Operating costs consume much of the annual budget and expenses. Of that, the pools are the largest expense related to activities with an annual average cost of \$104,873, based on conservative values.

Table 9: Operating Expenses

Average Expense	Average Cost
Contracts and Salaries	\$ 150,300
Operating costs	\$ 252,883
Capital Improvements	\$ 52,217
TOTAL Annual Expenses	\$ 455,400

DVRC has struggled financially since the HOA was dissolved in 2011. At that time a reserve study was completed.¹³ The reserve study is a professional document that provides information about the long-term costs to maintain facilities with anticipated reserve funds. Other than the reserve study, no other professional-level study has been conducted since that time to evaluate DVRC facilities, or its financial status.

A facilities assessment is a comprehensive financial analysis for estimating future capital improvement costs and projected income. A facilities assessment is necessary to determine

¹³ “Precision 20/20 Full Reserve Study,” for Dreamland Villa Community Club, Mesa, Arizona, May 11, 2011. Reserve Advisors.

future costs related to facility upkeep and capital improvement needs. The following factors should be taken into consideration as part of a financial assessment:

- Aging facilities
- Average downward slide of memberships over time
- Rising costs of doing business
- Potential societal changes, in which membership organizations on average, are in decline

The need to conduct a facilities assessment and a comprehensive financial analysis will be further discussed in Section 3. Cost efficiency is of utmost importance to the Board. Every dollar is leveraged to the maximum extent possible and spending kept to a minimum in order to deliver quality services to members. This is something DVRC has managed effectively, even without a steady source of income. The allocation of limited resources must be mission-driven to accurately assess future financial organizational needs. A clear understanding of the true costs of providing programs and services can help drive resource-allocation decisions and is critical to making informed strategic choices in the future.

Section 3: Analysis and Assessment

3.1 Context of Decisions

Analysis and assessment involves a closer examination of the structure, systems and strengths of the organization, as well as the issues and challenges facing it. It is through this examination that assessments can be made about what is working well and what the organization may need to do in the future. The identification of successes and accompanying stressors can provide a better understanding of the dynamics at work and how to build on the assets and strengths of the organization. Additionally, a more thorough understanding of the complexities that exist within the community can also help direct efforts toward beneficial solutions. This begins by assessing community needs and the resources required to meet these needs.

Organizational assets can be both physical and intrinsic. DVRC's longevity can be principally attributed to the many residents who have remained faithful and dedicated to the organization. Some residents have lengthy histories within the community, others have devoted extensive time and effort and others enjoy the amenities and participate in its programs. These intrinsic assets can be leveraged to develop effective long-term solutions through collaboration and community building. This involves the application of an all-encompassing marketing and community outreach campaign.

Currently, approximately 2,000 residents financially support DVRC without being obligated to do so. The rationale used by those who do not pay dues can only be surmised. Undoubtedly, the

reasons are varied. It is acknowledged that as soon as the HOA was dissolved a number of residents automatically stopped paying dues. The exact number is unknown.

It is interesting to note that when the HOA was in existence and dues became mandatory a vast majority of residents had to pay, regardless of their income. Therefore, the inability to pay argument is not necessarily a suitable argument to make for not paying dues. Equally, since all other 55+ communities have mandatory HOA fees, people who claim they don't have adequate income would have to pay them to reside at any of those communities. Certainly there are low income individuals and those on fixed incomes who actually may be unable to pay fees. However, these people would unlikely be able to pay fees in any 55+ community, mandatory or not.

Putting the past behind, it is now up to DVRC to develop new and creative methods for encouraging residents to pay dues. The first step is to develop and initiate a comprehensive approach. This can begin by surveying residents and homeowners to obtain their input. This must be combined with a continuous and vigorous program for educating and informing residents about the organization and is particularly needed to extinguish any lingering distrust that likely still exists.

The needs of the community are an important consideration when assessing why some residents pay dues and some do not. Community needs can relate to such things as programs, costs of activities, cost of dues, social needs and a variety of other considerations. Generally, two approaches are effective at examining community needs. These are as follows:

Community Needs

(1) Community Building and Collaboration: Recognizing what appeals to residents in order to become DVRC members can be ascertained by interviewing and surveying residents, owners, renters and existing members. Including members in the decision-making process is also essential for effective outreach practices

(2) Assessing Other Communities and Networking: Communicating with other similar 55+ communities facilitates collaboration and builds partnerships; through assessing what others are doing to effectively meet their community's needs new insights can be gained. An understanding of how assets and resources in other communities have been used to their advantage can provide beneficial information.

Reaching out to residents in order to better understand their needs and determining the resources required to meet those needs will provide better answers toward resolving the membership dilemma. Networking, marketing, collaboration and information gathering are potentially part of the solution. Additionally, educating and informing residents about DVRC must also become an essential part of a comprehensive plan to encourage residents to become members.

3.2 Examination of Challenges

As part of its planning effort the strategic planning committee gathered relevant data, facts and information about the community and the organization. Through this process certain challenges were identified. The challenges, described below, have derived from a series of factors. These factors include such things as communication, management and financial considerations:

- Process Challenges
- Cost/Budget/Revenue Challenges
- Human Resource Management Challenges
- Internal and External Challenges

Process Challenges – Process challenges relate to the functioning of the organizational system and include the procedures, methods and measures that are typically used to carry out the functions of the business. Processes can be difficult to modify, correct or change, especially if they have become ingrained into the organizational culture, or have remained the status quo for a long period of time. The following list reviews some of the major process challenges specific to DVRC:

- **Volunteer Program.** Without a specified volunteer program, an organization that is dependent on volunteerism cannot properly manage its volunteers and achieve a desirable level of success. DVRC Volunteers are necessary for carrying out a wide variety of activities, events, office assistance, and other important duties.
- **Membership Engagement.** Membership engagement involves the recruitment and retention of members. Keeping members satisfied and content with the organization is a primary goal. Actions necessary for this are such things as keeping members adequately informed, making them feel part of the process and maintaining relationships. This requires that the organization communicate with its members on a regular basis. Members are personally invested in the organization and must feel included. Therefore, fostering a sense of community is essential to membership engagement.
- **Committees.** Currently there are an excessive number of committees to effectively manage. Some committees may lack sufficient leadership; leaders and members are often subject to burn-out, or just give up in disgust.

Cost/Budget/Revenue Challenges – Budget and revenue challenges are an overriding concern since costs must be considered in every business decision. True program costs and budget allocations are essential to the bottom line. Knowing the real costs of each program allows the organization to make informed decisions and choices that sustain financial success. The organization is better able to plan and manage current and future budgets when it has accurate information and data about its programs. Some programs may be financially self-sustaining, or even generate a surplus. Others may require periodic or ongoing subsidy from fundraising or

other program areas. Determining whether or not to support specific programs and how they will be supported is a central strategic decision.

- **Financial Assessment.** It is important to fully assess the cost of doing business and what the realistic budgetary needs are and will be in future years. Compliance with the 55+ designation, maintenance of the facilities and general administrative duties are dependent on a steady income stream, proper documentation and assessing financial needs.
- **Capital Improvements.** Completion of a priority list for capital improvement projects with timeframes for completion and estimated costs is imperative for long-range planning.
- **Annual Dues.** There are no standard protocols, or explicit processes for determining the annual dues structure. When possible, dues should be based on factual data. This data could be the cost to operate facilities, cost per member, or the cost to provide necessary services. The timing for increasing the dues should also be based on a schedule, i.e., every two years or every five years. The basis for the preferred schedule and increases should include a specific rationale and justification. All considerations regarding dues should be based on the long-term financial needs of the organization.
- **Funding Mechanisms.** Funding mechanisms, such as fundraising efforts, are often inconsistent and sporadic. Funding mechanisms that rely solely on volunteers for revenue should not be considered essential for funding programs. This is ineffective and not sustainable. Events, fundraising and entertainment boost funding, but are unsuitable as long-term funding sources for operating and managing the organization.

Human Resource Challenges – Human Resource challenges are at the heart of the organizational structure. Staff members and volunteers interact with the residents and members; as well as carry out their day-to-day duties. Maintaining a productive and pleasant business environment is conducive to effective management and employee retention. The loss of key personnel or volunteers can create tension when an organization is unprepared to deal with it. Preparedness and preparation are crucial to addressing human resource needs and the sudden loss of personnel, including volunteers.

- **Succession Plan.** Succession planning is instrumental for addressing turnover of employees. A succession plan allows the organization to be more proactive than reactive. The loss of institutional knowledge is also a concern and can be addressed in a succession plan.
- **Maintenance Supervisor.** A paid maintenance supervisor/foreman position is desired to meet the needs and mission of the organization. Not only are foremen responsible for maintaining facilities and the repair and replacement of equipment, they also have institutional knowledge of the organization. Foremen supervise maintenance workers and

provide their expertise with contractors, vendors and others inside and outside of the organization. The maintenance of critical systems, such as plumbing, electrical, heating, and mechanical are essential to keep in good operating order. Future personnel needs should be evaluated based on an overall assessment of costs and other considerations.

- **Administrative.** Without an administrative arm to manage the organization, various systems are often left vulnerable. The lack of administration presents a “gap” in the management structure, leaving primarily the office and the Board to manage areas that they are not typically responsible for. This often places excessive burden on staff, board members, volunteers and committees to help perform critical organizational functions.

Internal and External Challenges – Internal and external challenges involve characteristics and influences that the organization may or may not have control over, as described below.

- **Outreach.** Community outreach is crucial to the relationship between the community and DVRC. This should be given a high priority within the organization. The office is currently developing more efficient methods of community outreach through technology and various communication strategies.
- **Communications.** Communications within the organization is often inconsistent, fragmented and inefficient. Accountability and credibility depend on consistent communications inside and outside of the organization.
- **Marketing.** Intensive marketing strategies are necessary to actively promote DVRC and what it has to offer; utilizing “brand” recognition and generating awareness about the benefits of membership builds trust, consistency and credibility. Utilizing the knowledge of a marketing manager or obtaining professional advice from a marketing firm may also be of benefit. Although hiring expertise to develop marketing schemes would cost money in the short term, it could also generate long-term revenue.

The challenges noted above are a select few, but are important to consider because they represent the core of the organizational system. An effective system will attempt to address the factors that may have an adverse impact on the business. By taking a closer look at these factors and how they may affect the efficiency, effectiveness and accountability of the organization can help provide methods and direction to meet these challenges.

3.3 SWOT Analysis

The strategic planning committee developed a SWOT analysis for DVRC. The results are provided in Table 10, page 31. The acronym SWOT refers to Strengths, Opportunities, Weaknesses and Threats. This analysis is effective at illustrating areas where the organization is performing optimally, as well as those that require adjustment. From this understanding, it is possible to reduce organizational weaknesses and capitalize on strengths.

The SWOT can also be helpful for determining which goals, objectives and strategies are most plausible to implement successfully and help understand the limitations and expectations of the organization. When referenced regularly, organizational goals can become more focused and deliberately formed to build on the strengths and opportunities and address foreseen or unforeseen weaknesses and threats. Continuous usage of the SWOT analysis allows the organization to form a more realistic perspective of its practices for long-term planning purposes.

Used extensively by business and nonprofits to develop short and long-term strategies, the SWOT analysis is an effective tool. The true measure in conducting this exercise is with using the results to maximize positive influences on the organization and to minimize the negative ones.

3.4 Organizational Systems Analysis

3.4.1 Governance

Governance of the organization involves leadership, setting direction, establishing accountability, understanding regulations, developing and managing financial and human resources and effective marketing and communications. Governance and administration of key functions can be demanding on those with the responsibility for management working with limited budgets and staff.

In these circumstances a balance must be struck between what is important and what is not. Funding all areas of the organization requires sound, ethical, legal and fiscal policies. To generally improve board effectiveness it is useful to periodically consider how decisions are made and how policy is being established. Sometimes a *board self-assessment* is helpful for accomplishing this. A list of concepts for conducting a board self-assessment is provided on Page 32.

Table 10: DVRC SWOT Analysis

Internal STRENGTHS (have “control” over)	External OPPORTUNITIES (have “no/little control” over)
<ul style="list-style-type: none"> • Long-time community presence • General sense of community • 55+ overlay designation • Good location for access to resources • Determination to remain in business as a viable organization 	<ul style="list-style-type: none"> • Utilization of external stakeholders to increase exposure • Potential historic designation &/or promote uniqueness as an original 55+ community • Modernizing facilities and activities • Commitment to remain sustainable into the future • Lack of understanding of the benefits to membership
WEAKNESSES (have “control” over)	THREATS (have “no/little control” over)
<ul style="list-style-type: none"> • Declining memberships & decreasing member involvement • Volunteer burn-out • Inconsistent communication of processes with branding & marketing messages • Lack of enthusiasm persisting from past occurrences • Planning & direction from governing board • Absence of administrative/executive leadership • Apathy towards the organization within the community • Keeping up with changing technology to reflect professionalism and efficiency • Governing board not taken seriously; exhibiting professional approach to duties • Absence of a “big picture” outlook by the organization to assess what is in the best interest of the community in the long-term 	<ul style="list-style-type: none"> • Lack of sufficient revenue for long-term sustainability • Outmoded infrastructure • Competition with other 55+ communities with newer & more up-to-date facilities and activities • No legal standing to require community financial support • Changing cultural values

Board Self-Assessment Concepts:

- Implement a system for decision-making and critical analysis that involves a methodology for differences of opinion, conflict resolution, reaching consensus and generating ideas; i.e., protocols and effective by-laws
- Reduce indecisiveness and reluctance to make decisions which can lead to ineffectual policy; indecision can also affect progress and create tension within the organization
- Develop an expectation that board members be adequately prepared prior to meetings; this is part of the professionalism expected of board members
- Hold meetings that have a proactive and positive approach to decision-making and problem-solving that lend itself to the creative process
- Establish and implement annual goals and objectives based on relevant data with completion dates; this is a proficient and effective means of reaching desired ends
- Access to standardized documents (e.g., committee reports, financial information, maintenance updates, etc.) at board meetings can help facilitate discussions
- Board members are more effective when they have updated information and are sufficiently informed about the business; the board can be hindered by insufficient information and lack of data presented in a written and consistent manner

Meetings provide opportunities for constructive and deferential debate of important issues and matters of concern. When meetings include more than the normal routine, they can become engaging and productive. All Board meetings should center around two fundamental questions: "Why does this organization exist?" and "How can our board help advance the mission?" Asking the right questions can motivate the board and members to look at the bigger picture.

Meetings are also necessary for effective communications and dialog. This becomes more difficult when there are time constraints and other complications. There are a number of issues and unanswered questions about board meetings and member meetings. Some of these questions are, "How many meetings are needed and who should attend the meetings (i.e., should board meetings be open to all residents)?" "How many meetings should be held specifically for members and/or residents to keep them adequately informed?" "How many additional meetings should be held by the Board to discuss specific issues and matters of concern?" "How many meetings should be held for committees and volunteers?" "What is accomplished when the board is on hiatus during the summer months?" These are relevant questions that require further discussion and examination and should not be left unanswered indefinitely.

The question to open DVRC meetings to nonmembers was posed to the membership on the questionnaire at the annual meeting. When asked, "Should nonmembers be allowed to attend DVRC meetings?" the response was 53 in favor and 91 opposed. The same question was also

asked at the coffee talk meetings. The response at the coffee talk meetings was 34 in favor and 21 opposed. Further information about this is needed to sufficiently answer this question. However, some of the comments provided by members stated that they would be amenable to allowing nonmembers to attend DVRC meetings, only if nonmembers observed and were not allowed voting privileges. This could be a potential solution to resolving this dilemma.

The format of board meetings can be more effective when meetings are directed at achieving particular outcomes. The recent change in the format of the study sessions is an excellent example of this. This change will lend itself to better-quality discussions and critical decision-making. Developing annual goals and objectives are also a means of achieving high quality results.

The Board has been criticized in the past for not being transparent and for holding “private” meetings. However, DVRC is a private entity and can hold meetings anytime for any reason. As a private entity open meeting laws do not apply. In order for the Board to accomplish their mandate and continue to do their due diligence, meetings are essential and demonstrate a board’s commitment to the organization.

Internal and external pressures are often placed on board members. There are times when board members are compelled to get involved with day-to-day operations and feel obligated to do so. This places undue stress on the board who often find they must wear more than one “hat.” This can cause the lines of authority to become blurred and can burn people out unnecessarily.

The existential threat to DVRC is that if funding is reduced to the point where the facilities and operations cannot be sustained, not only would the programs be in jeopardy, but also the 55+ overlay. This necessitates the need for the membership to be kept informed on a continual basis about DVRC’s situation and circumstances. It is the duty of the board to steer the organization toward a sustainable future. To make the most appropriate choices, decisions will require data, information and informed consent of the community. Through the community input process it was clear that members highly value the 55+ overlay and are committed to maintain it.

Along with networking and communicating with other similar communities, sharing and pooling resources with other organizations can also be an effective tool. This should be considered in the case of the Dreamland Posse, Help Services, and Dreamland Villa. Each of these entities is struggling with various matters, including the ability to fund programs and recruiting volunteers. Increased collaboration may provide needed stability and to take advantage of economies-of-scale. DVRC could also establish a more active relationship with Velda Rose to assess the possibility of sharing resources and information.

Changes to the structure of the Board could be considered in order to help simplify, or streamline the responsibilities to only a few. This can be accomplished by establishing the following arrangement: President, Vice President for External Affairs, Vice President for Internal Affairs (Treasurer) and Vice President for Governance (Secretary). This can accompany a three-committee structure consisting of Internal Affairs, External Affairs and Governance.¹⁴

3.5 Financial Analysis and Assessment

The questions surrounding DVRC's financial picture are numerous, but finite. By analyzing the facilities and collecting data to properly assess income and expenses; this picture should become much clearer and apparent as to what options are available. A thorough analysis of the data will facilitate more accurate decisions about the future needs of the community. This can be accomplished through a financial assessment. The better the available information is on which to base decisions, the better the decisions that can be made. Some things to potentially include or consider in a financial assessment are shown in Table 11.

The financial assessment can likely be done in-house, but will also require professional services. Professional services would be necessary to conduct an inventory and assessment of the facilities, infrastructure and equipment. In conjunction with this, a financial review is needed to establish a baseline for forecasting future financial requirements. A further discussion regarding the facilities can be found under Section 3.8.

Table 11: Financial Assessment Considerations

Evaluate a dues structure based primarily on projected budgetary needs for capital improvements and operations over the next 10 + years
Explore realistic revenue options
Development of a long-range financial plan (may require member approval)
Conduct a trend analysis of specific costs
Track income/revenue trends over time
Evaluate all facilities and infrastructure; prepare a facilities plan for long-term needs
Develop an action plan to achieve specific financial goals
Establish priorities for capital improvements
Make organizational changes to support goals and objectives for financial sustainability
Use strategic plan to identify and compare financial scenarios
Compare costs of providing programs and activities
Identify need for resources to support future costs
Honestly assess the feasibility of financial needs, wants and desires
Prioritize projects based on cost data, design and other considerations
Monitor the implementation of projects
Ensure that key personnel and board members have a shared understanding of the organization's

¹⁴ La Piana Consulting, nonprofit consulting firm, Oakland, CA

financial health, business model, and financial risks
Establish agreement on organizational goals and priorities
Balance emphasis on annual budgeting with financial forecasting

Because DVRC is reliant on membership dues as its major source of income, it is critical to implement a process for determining a specific dues structure that is based on projected budgetary needs that include capital improvements and operations. This is necessary in order to assess the sustainability of the organization while considering projected income and estimated costs. There are no current procedures in place for a dues structure and process for increasing annual dues. The current \$175 annual fee does not cover the per person amount needed to operate the organization of \$240. This is a difference of \$65. This is problematic since raising the dues to any significant degree would no doubt deter people from paying.

It is understood that when dues are increased a certain number of members do drop out and it takes time to recoup those numbers. The only available information regarding dues is from the results of the questionnaires at the annual members meeting in 2020. When asked if members would support an increase of up to \$225, the results were 89 in support and 54 opposed. The reasons given for and against were all over the place. However, it does appear that offering a monthly payment option may help as a mitigation strategy. When asked on the questionnaires if DVRC should provide a monthly payment option, 86 voted yes and 56 voted no.

One consideration for reaching consensus regarding the debate about dues and memberships is to form a Task Force from the community. A Task Force would be made up of members from various backgrounds that would develop protocols regarding the dues structure and determining ideas for increasing memberships. The Task Force would only be tasked with suggesting the alternatives that are feasible and implementable alternatives (not hashing through impractical ideas) that would be recommended to the Board. Using this approach allows the community to be involved in the decision-making process.

Dues increases, when backed-up by data and information are given more credibility. When combined with regular membership drives and community outreach programs, the implementation of any dues increases might be more successful. A tiered structure has also been discussed as a possible means of increasing memberships. This requires further examination and discussion. However, it is likely that if given a choice a certain number of people would opt to pay the lesser amount offered. Additional information from the membership regarding this would be helpful.

Other potential means of increasing income have been articulated, but have not been thoroughly analyzed. These include the implementation of a “maintenance fee, or capital improvement fee” that would be paid when a new homebuyer purchases a home, establishing a “foundation”, or

fund that would collect money from various sources, or that each homeowner could pay into; and the idea of attaching the home to a deed in perpetuity that would ensure that DVRC membership passes from one owner to another. Another idea is to expand the use of DVRC facilities to outside parties for additional rental income. Although this idea could potentially raise a tax liability issue, it deserves further investigation. Any ideas to produce revenue would require legal opinion and further research, but should be explored.

A long-range fiscal plan should be completed in conjunction with a marketing plan to create a more comprehensive approach to financial planning. This allows the organization to take an honest and open look at its long-term financial requirements in relation to its efforts to increase revenue. In addition to the considerations presented previously, there is a need to keep the membership apprised of current and future financial circumstances. This allows for transparency about where the money is going and the overall financial health of the organization.

Members are entitled to understand the current and projected financial status, annual income and expenditures, plans for raising revenue, increasing dues and how money is being managed. An understanding of the financial details of the organization is important for assessing budgetary needs, making financial projections and providing appropriate information to the membership at all stages of planning.

3.6 DVRC Operations Assessment

3.6.1 Office Management

As technology continues to permeate the way business is conducted over the next ten years, and beyond, consideration must be given to the impact this may have on office staff, volunteers, productivity, and costs. As smart technologies increasingly become the norm, the workplace of the future will be different from the workplace of today. Office interactions with vendors, businesses, residents, members and other stakeholders will need to be adapted to network sufficiently, as the "*paperless office*" rapidly becomes reality.

Planning for office renovations and updates in the future will want to consider personnel needs, technology and overall aesthetics. Design considerations and cost estimates will be necessary to determine the future functionality of the office; including its appearance since this is where visitors and others obtain their first impression of the organization. The general appearance and look of the office also has an effect on office workers. The receptionist, office manager and accountants all work in a relatively confined space. The office receives extensive foot traffic as well as noise from the adjacent woodshop. As modifications to the office are deliberated, things such as equipment needs, technology, lighting; windows, doors, room layout, noise, distractions, ergonomics, aesthetics, workstations, and climate control will need to be factored in.

The office is responsible for numerous processes. These processes can be impacted by various constraints; such as cost factors and limited staff time. One such process involves the difficulty with conducting community outreach. The cost of making copies and mailings for potentially thousands of people on a regular basis is cost prohibitive. It can cost more than \$2,000 to mail questionnaires to residents at one time. This is a concern since potential strategies involve regular communications with members and residents. These limitations hinder DVRC's ability to reach out to the community on a regular basis. Going door to door is not practical and the Citizen carriers are unable to stuff papers with flyers and announcements. This also is not a practical solution.

The implementation of strategies to improve communications will likely be affected by these various constraints. The office has been utilizing social media and collecting email addresses to facilitate community outreach efforts. The Citizen paper remains popular with members and is important for those who do not use social media or email. But, is always one month behind and therefore; is not reliable for the most up-to-date, direct communications method.

Table 12 indicates the office expenses for year 2019. It can be anticipated that these costs will continue to rise over time. As business needs change and technology plays a larger role in office administration future budgets will need to take this into account.

Table 12: 2019 Office Expenses

Expense	Cost
Website	\$ 744
Accounting	\$ 1,531
Bank charges	\$ 195
55+ Fee expenses	\$ 7,582
Membership Marketing (incl. mailings)	\$ 3,652
Office supplies	\$ 3,459
Postage	\$ 1,153
Copy Machine	\$ 3,932
Telephone/Internet	\$ 5,890
Salaries (office only)	\$ 74,578
Payroll Taxes (office only)	\$ 7,032
Payroll Processing (office only)	\$ 1,400
Employee Benefits (office only)	\$ 2,143
Workman's Comp (office only)	\$ 600
	\$113,891

3.6.2 Maintenance

Maintenance operations are often under pressure to accomplish what is needed with limited staff and funding. Effective maintenance planning is essential to streamlining processes and

encourages more effective management of resources. Advance planning provides the Board and the office with current information, especially for board meetings. Development of a maintenance plan would include such things as a summary of scheduled work, completed work, current work activities, suppliers, contractors, and vendors. This would help guide all maintenance work activities and is needed for scheduling preventive maintenance of the most critical assets. A record of activities also provides easy access to the information.

The assets of the organization are important to consider because they require routine upkeep and restoration that saves money in the long run. Planning ahead is always preferable to making unnecessary costly repairs in the future. When needs and expenses are estimated in a plan, this helps prevent the constant “putting out fires,” scenario, which is inefficient—and costly.

Routine maintenance and scheduling of tasks is an important function of maintenance. A tracking system, such as a maintenance checklist, would be beneficial for the office, the board and maintenance personnel. Understanding the intervals at which particular assets are maintained, such as weekly, quarterly and annually, provides timeframes for scheduling and the financing of repair, replacement and overall preservation of equipment. A checklist also allows for easy access to the information.

Creating a position for a paid maintenance foreman/supervisor would provide for the managerial oversight of normal maintenance functions. This includes tracking, establishing maintenance priorities and recordkeeping. The limited number of maintenance personnel does not allow for efficient routine operations. Temporary employees are seldom used due to the need for training and other complications.

Grounds (Pools, Hot tubs and Infrastructure)

DVRC would benefit from an assessment by a professional firm to ascertain the long-term future costs of the infrastructure; including parking lots, swimming pools, hot tubs, sidewalks, repurposing and/or revitalizing activity areas and all building exteriors. It is also equally beneficial to assess improvements to outdoor open spaces including landscaping, signage, beautification and enhancements to the grounds.

Maintenance is a critical component of DVRC operations. Maintenance of the buildings and the infrastructure will become more costly in future years. Undertaking appropriate planning efforts now in anticipation of these future needs will provide a clearer vision for budgeting and estimating costs. Related strategies are found in Section 4.

3.7 DVRC Programs and Activities

DVRC provides facilities for the delivery of services to its members. These services are integral to fulfilling the DVRC mission and are formalized into specific programs. The major categories of programs are:

1. Recreational:
 - Indoor activities
 - Outdoor activities
2. Library (closed in spring, 2020)
3. Entertainment and Events

Programs are highly valued by the members who participate as a benefit of living in the community. An indication of this sentiment was obtained during the comment period conducted for this study. Although activities and events are not a legal requirement of a 55+ community, they are a desirable attraction. To be the most effective, programs should be tied directly to the organization's mission, vision and values. Continuance of a program merely for the sake of maintaining that program is not effective in the long term.

Marketing strategies are a useful tool for gaining a better understanding of members' preferences for programs and activities. Indicators of program success can help establish whether or not a program is actually successful. These indicators may be such things as the number of clients served, revenue generated, milestones accomplished and measures of satisfaction. This information can be gathered from surveying the users to determine program preferences. Marketing strategies also need to include volunteerism as a component since programs are dependent on the availability of volunteers for their success.

Programs and activities can often present a dilemma regarding the cost of service delivery. These costs are generally borne by DVRC members. Should there be more trainers for activities and programs? How much money should DVRC directly set aside annually to its programs? There are several situations in which decisions must be made to assess these costs and how they impact DVRC. These are presented in the form of a question, as follows:

Q: "How much are members willing to pay for a specific service?" For example, what is a suitable charge for an art class or aquasize class? Marketing strategies can gather information from users to identify their preferences. From this, adjustments can be made.

Q: Should activity rooms pay a portion annually to the DVRC general fund for use of the facility to help pay for such things as utilities? Some activities and clubs already donate a portion of what they take in. How much additional revenue would be created for DVRC through mandatory assessments of the activities? This requires further study.

Q: How much should members pay and how much should people from outside of the community pay to participate in DVRC activities? Currently the charge to attend classes for non-residents is lower than what a member pays on a monthly basis. Is this satisfactory to the membership? What should the cost be?

Q: How much should members expect for “free” for the services they receive? Members may feel that they should be allowed more benefits because they already pay annual dues. For example, the Computer Club charges an annual fee to belong. Should this fee be charged on top of what members already pay? Or, which events and activities can be free to members and to what extent?

Q: Should residents pay more than members to engage in DVRC community activities? For example, should members pay \$5 for a pancake breakfast and nonmembers pay \$8? How much should non-residents pay, \$10?

The questions posed above are part of a continual debate within DVRC. It may be suggested that data would be helpful to evaluate and answer these questions. Once data is available, events and activities can be analyzed based on costs, usage, attendance and other factors. From this, more specific information can be obtained and policies can be formulated.

3.8 Facilities and Infrastructure Assessment

The upkeep, renovation and routine maintenance of the facilities is a major consideration. Due to the age of DVRC facilities, modernization projects are inevitable over the next ten years. Plans for the facilities will need to be considered when developing budgets and prioritizing projects. What will be the priority for implementing projects? What are the protocols that will be used to make these decisions? Who will make these decisions? How will making these decisions affect other decisions?

An important consideration is to determine how each of the facilities fits into the organization’s future plans. Should the exercise room be extended into the billiards room? What should the Read Hall bathrooms look like once they are remodeled? How much should it cost? What treatments will be needed for the pools and hot tubs over the next ten years? What will be done with the Library? These are all important decisions to consider before taking action, in which advance planning will be necessary. An examination of “greening” opportunities, technology updates (e.g., LED lighting) and ADA compliant considerations also merit examination during the planning process.

A project priority list with estimated costs and timeframes is a necessity for the planning process. Tables 13 and 14 contain lists of the potential capital improvement projects identified for Read and Farnsworth Halls. The format used in these tables can be helpful for developing priority lists for these as well as other facilities and outdoor activity areas. All potential projects would be

placed on a priority list and divided into projects that are considered necessary and those that are desired.

Various studies and professional reports can be conducted to evaluate the facilities and develop cost estimates for capital improvements. The only professionally prepared report that DVRC has regarding the facilities and infrastructure is the Reserve Report, completed in 2011. This report provides useful background information and has been utilized to some degree during this process. However, the report is outdated and is no longer suitable for obtaining relevant information on which to base decisions or develop strategies.

A reserve report can be helpful since it estimates the useful life, replacement schedule and replacement costs of the physical assets, and includes a financial analysis. It is essentially a long-term capital budgeting and planning tool that identifies the status of the reserve fund and develops a funding plan to offset the deterioration of the facilities and infrastructure over time. With this understanding, a long-term financial plan can be developed.

Aside from reserve reports, other relevant methods can be useful for evaluating future anticipated costs of facilities and infrastructure. These methods include a Capital Improvement Plan (CIP), Facility Condition Assessment (FCA) and Facilities Management Plan (FMP), to name a few examples. Each of these utilizes specific methodologies since they each have their own distinct purpose and use. Maintenance would need to be a critical part of any method that is used to assess the facilities and grounds.

A professional-level study to obtain long-range costs for maintaining DVRC assets and infrastructure is essential. Studies such as these provide a valuable link between the members (who pay the bills), the Board (conducts the budgeting process and makes decisions) and the strategic planning process (lays out the needs). This information could serve the Board in a number of ways, including:

- Provide the board with a long-term perspective
- Provide planning guidance for board members and staff
- Provide important disclosures to members and homebuyers about the condition of the facilities and the level of attentiveness given to them
- Establish a policy to improve how reserve funds are used
- Meeting long-range goals

A Capital Improvement Plan (CIP) would identify the necessary capital projects, propose an implementation schedule and develop project priorities. A CIP¹⁵ would include the following information as well as estimated costs over a ten-year period:

¹⁵ OpenGov.com, Capital Improvement Plans 101, September 10, 2019, Charlie Francis.

- A listing of the capital projects and equipment to be purchased
- Projects ranked in order of priority
- A plan for financing projects
- A timetable for construction and completion of projects
- Justification for proposed projects & explanation of expenses for projects
- Allowing for a systematic evaluation of all potential projects at the same time
- The ability to identify and consolidate projects to reduce duplication of effort
- Serves as a public relations tool & fosters communications
- Ensures the efficient use of funds
- Allows for consistency and reliability in future planning efforts
- Provides transparency to the membership

A Facility Condition Assessment (FCA) of all assets would focus on future needs and costs of maintenance and facility improvements over the next ten years. An FCA would analyze the current condition of the facilities, assess the costs of upkeep over time and factor in estimated capital that might be required.

The development of a Facilities Management Plan (FMP) describes the facilities, their purpose and future plans. The main purpose is to plan all aspects of the facilities and what the potential costs would be. It outlines how the facilities would be utilized in accordance with the strategic plan and how projects could be successfully implemented. An FMP would include prioritized and desired projects as well as maintenance needs. The objectives of this plan are to:

- Implement a fiscally responsible approach to facility planning
- Increase the frequency of facility evaluations to no more than every five years
- Consider opportunities for change and flexibility to suit community needs
- Provide a community input process for continuous participation from residents
- Include methodologies to ensure sustainability
- Evaluate facilities based on a programmatic timeline to prevent long-term building deterioration

In order to better understand the capital improvements needed over the next ten years the Board might consider establishing a Capital Planning Subcommittee with its own bylaws to define how decisions will be made. This subcommittee would take an inventory of the capital assets and evaluate previously approved, unimplemented or incomplete projects. Estimates for future capital improvements would also be obtained and/or substantiated. From this, future projected costs and a list of prioritized projects based on need and cost factors could be developed. These estimates can be used strategically in the budgeting process. A Capital Project Subcommittee would consist of maintenance personnel, experienced volunteers, board members and planners.

DVRC facilities must compete for the same funding over the next ten years. Any sort of assessment of the buildings and infrastructure would provide information that is not readily available at this time. There are a number of methods that can be used to assess the facilities. See Section 4 for these and other strategies that have been identified.

3.9 Facilities Management

There are essentially three main uses of Farnsworth, primarily during the high season:

- Entertainment – programs overseen by the entertainment committee such as concerts and shows; these events usually generate revenue
- Events initiated by volunteers that occur regularly, occasionally, or are one-time events; these are typically not overseen by any particular committee (except for the kitchen committee that manages the pancake breakfasts). Events in this category include events such as special fundraising activities, pancake breakfasts, craft shows, annual high tea and special community events. These events usually generate revenue
- Member events are open to members and/or residents; these might be free meals, the annual member meeting, or other similar occurrences that are essentially held for the good of the community and not necessarily to produce income or raise funds

The management of Farnsworth Hall remains a challenge for the organization since it requires extensive use of limited resources to manage. Ideally, hall activities would be coordinated by one individual whose responsibility would be to oversee the kitchen, make decisions, provide necessary supplies, coordinate the volunteers, help make arrangements and preparations, work directly with the office, maintenance and the board, oversee cleaning and repairs, coordinate with vendors, prepare contracts, arrange schedules, obtain necessary cost estimates and maintain a priority list of needs. Currently there is no funding for a position of this type.

The following list indicates the effort required to operate Farnsworth Hall under the current arrangement:

- Kitchen– kitchen manager, cleaning, supplies, ordering supplies, stocking supplies
- Ticket sales – advertising, publicizing and promoting shows and events
- Administration – paperwork, tracking, record keeping, financial responsibilities, general organizational management, contracts & agreements, office staff time
- Volunteers – locating and training volunteers, overseeing work of volunteers
- Maintenance – cleaning, general building upkeep, repairs, accommodating events and administration (managing employees, coordinating with committees)
- Long-term costs - building and grounds preservation (e.g., roofs, painting, repairs)
- Equipment costs and expertise (e.g., lighting, sound & musical equipment, etc.)
- Exterior grounds (band shell) – shades, canopies, seating, barrier fencing, lighting

- Communications – internal and external customers, advertising & marketing, social media, sponsors & stakeholders, verbal and written, website & digital media

Volunteers and office staff could benefit from the use of a management plan for the hall. This plan would be used to coordinate hall activities by providing general procedures for its use including, activities, maintenance, events, rentals, entertainment and kitchen. The kitchen manager position is voluntary and often difficult to fill. Ideally, the kitchen manager would be a full-time resident and properly qualified to oversee kitchen operations.

Without benefit of a hall manager, or management plan, it is essentially left up to volunteers to determine how the hall is managed. This is counterproductive and an inefficient use of limited resources. Volunteers working the hall do so, essentially on their own, without a system in place for proper guidance, management or direction.

Event coordinators are responsible for their own events from beginning to end and recruit the necessary volunteers. Event coordinators are typically responsible for the following tasks:

- Planning events; contacting entertainers, performers and bands
- Preparation for the event
- Working shows (before, during and after)
- Meal and food preparation and serving
- Ticket sales
- Advertising and marketing
- Decorating
- Obtaining additional volunteers as needed
- Purchasing supplies
- Managing rentals
- Obtaining door prizes and gifts
- Working with internal and external customers and sponsors
- Paperwork and documentation
- Music, lighting, sound system
- Crowd control, parking, etc.
- Band shell concerts (work before, after and during)

Rentals by outside parties at the hall are typically arranged and overseen by the Entertainment Committee. The committee chair manages all contracts, marketing efforts and payments. Rentals occur throughout the year and include such things as wedding parties, graduations and Quinceaneras, to name a few. Rentals often require special consideration and attention to detail. Volunteers provide the necessary oversight and duties required for these occasions for which there are a number of responsibilities.

These responsibilities include steam ironing linens and placing on the tables, meeting the party in advance to provide them with keys, instructions and a walk-through of the hall. During the event

they either attend the event or are on-call and in some cases provide security. After the event the volunteer(s) check the hall and receive the keys, remove soiled linens and coordinate with the linen vendor to ensure the linens are counted, picked up, and checked in before placing them back on the racks and in the storage locker.

The majority of events at the hall are open to the public. It is recognized that many who attend these events are not residents of Dreamland Villa, but come from outside the community. In order to attract enough attendees to make events profitable, many events are advertised in print media and online through various marketing efforts. This requires an annual budget for advertising and promotion, as well as a volunteer (usually the chair) to plan, develop and implement the advertising campaign.

Income from the hall is constrained by the following limitations:

- The Entertainment Committee has a physical limit as to what they are able to do; most members are winter visitors. Using the same volunteers time and time again is not healthy or sustainable; the expectations and workload placed on the Committee is considerable.
- The amount of revenue that is raised from rentals (non-member events) is limited under nonprofit rules. After the threshold of 35% is reached for nonmember events, additional income becomes taxable. This rule requires further research to determine the exact guidelines and limitations. The inadequate volunteer pool also dictates that the same volunteers who work rentals often work other events.
- Income from fundraising is largely ineffectual due to the lack of a specific fundraising program. Most fundraising events have limited revenue-generating capability. Fundraising requires extensive planning and preparation.
- The absence of a steady and reliable kitchen manager can be problematic for planning and promoting events.

The initiation of a management plan for the hall would provide support to the volunteers by articulating the various aspects and intricacies involved with hosting events and fundraisers. This idea lends itself to improved management and more effective processes. Although events take an enormous amount of work, they do generate revenue. The money from events goes into different accounts. Revenue generated by the Entertainment Committee goes into the general fund. Revenue raised from other fundraising events typically goes into specific restricted accounts, or into the general fund.

3.9.1 Farnsworth Hall Proposed Improvements (Interior and Exterior)

Various capital improvement projects have been considered for the hall; specifically the expansion of the kitchen and restrooms. These are large ticket items for which no adequate funding source(s) have been identified. There is currently a fundraising effort to improve the capacity of the kitchen. To date no design plans, cost estimates, or architectural designs for kitchen expansion have been completed. As of April 1, 2020, restricted funds set aside for kitchen expansion contained a total of \$ 9,511.00. Deliberation of kitchen expansion at the hall should include the following considerations:

- Conduct a cost/benefit analysis - the cost to expand the kitchen vs. the long-term costs to maintain the building and anticipated revenue
- Develop design plans with realistic cost estimates
- Recognize that expanding the kitchen will not allow more people to be fed at events because the hall is limited by the number of tables that can be set up
- Consider the long-term sustainability of the hall (income vs. costs of upkeep, retaining trained volunteers, kitchen manager, etc.)
- Kitchen expansion competes with other priority projects

The proposed solution for the women's room is to add additional stalls. This would require relocation of both the women's and men's rooms. The most recent cost estimate obtained to reconstruct and expand the restrooms indicated a preliminary cost estimated at approximately \$100,000. It is in agreement that a more practical cost estimate is needed. However, it is likely that the cost of restroom reconstruction and expansion could require extensive funding. A more accurate cost estimate and preliminary design is needed. This project also competes with other priority projects.

Table 13: Farnsworth Hall Capital Projects provides a listing of potential projects proposed for the interior and exterior of the hall. These projects will be further deliberated and assessed during the implementation phase of strategic planning.

3.9.2 Read Hall Complex (Interior and Exterior)

An assessment of the Read Hall complex is needed to calculate the future costs of upgrades. A priority list of projects will help determine what projects are needed, when and what purpose they will serve. Table 14, page 48 lists the projects proposed for Read Hall. The activity rooms need a coordinated effort for updating and remodeling.

Interior plans for the main hall, billiards room and exercise room should be developed before undertaking any future updates. Design elements such as color scheme, wall and floor tile considerations, type of overall design and room elements (i.e., doors, windows, audio-visual equipment, ceiling fans, bulletin boards, lighting, furniture) will need to be considered in order to obtain reasonable cost estimates and determine the ultimate look and functionality of the rooms.

Table 13: Farnsworth Hall - Capital Projects (Interior and Exterior)

Priority Order	Name	Estimated Cost	Timeframe for Implementation
Interior – Farnsworth Hall			
	New chairs, or cushions		
	Sound system upgrades		
	Restroom Remodel		
	Enlarge/remodel ladies room		
	Enlarge/remodel kitchen		
	Remove/update curtains		
	Sand, stain and seal stage		
	New locking mechanism for pantry		
	Install energy saving windows		
	Paint panels below main hall windows		
	Install Security system		
	Upgrade presentation materials (laptop, sound system, software, projector)		
	LED lighting		

Priority Order	Name	Estimated Cost	Timeframe for Implementation
Exterior – Farnsworth Hall			
	Poster size lighted sign on outside wall		
	Exterior brick repointing & block mtce.		
	Parking lots- repaving, resurfacing, asphalt seal coat, patch, crack repair		
	Roof maintenance and upkeep		
	Equipment repair and replacement		
	Swimming Pool and hot tub upkeep		
	Sidewalk maintenance		
	Bocce ball courts require routine maintenance; examine usage		
	Update exterior sign (electronic)		
	Water resistance weights for aquacise		
	Paint lines on cool decking at pool		
	Paint brick wall around the pool		

The Read Hall complex contains the majority of outdoor activities. The shuffleboard courts are underutilized and could be repurposed. The pool area has been well maintained and does receive extensive use, including aquasize classes. The proximity of the pool area relative to Read Hall

could be considered for enhancements to modernize the general appearance and examine the access between the hall and pool area.

Table 14: Read Hall Capital Projects

Priority Order	Project Name	Estimated Cost	Implementation Schedule
	New chairs, or cushions		
	Update sign in front of Read Hall		
	Wireless microphone		
	Update restrooms		
	Water resistance weights for aquacise		
	Upgrade poker room		
	Upgrade fused glass room		
	Office remodel – electrical, paint, upgrade computer programs, furniture		
	Handicap door at office entry		
	Security system		
	Paint lines on cool decking at pool		
	Paint the brick wall around the pool		
	Install energy saving windows		
	Upgrade presentation materials (laptop, sound system, software, projector)		

3.9.3 Library Building

The closure of the library opens up possibilities for new uses. Two distinct possibilities are to repurpose the building for continued use by members, or utilize the building to generate income. Estimated costs for remodeling and repurposing future usage of the building should be based on design specifications, costs and other related factors.

3.10 Board Committees

Through the strategic planning process, several key issues have been identified regarding the committees and the committee structure. Table 2: List of Committees, indicates a structure inconsistent with the needs of DVRC. Therefore, it must be asked, “Are committees functioning effectively, or are they rooted in traditions that grew out of past necessity and have lost their relevance?” “Are they helping or hindering success of the organization?” In order to adequately answer these questions the current committee structure must be reexamined.

Committees are the work horse of the organization and are essential to the DVRC mission. Currently, there are too many committees to be effectively managed. Along with their primary duties, the function of the committees should also emphasize (1) sustaining and increasing memberships, (2) communications, (3) community outreach. To utilize the committees only for their stated purposes misses the opportunity for the committees to become “ambassadors” for the

organization. This is particularly true for those committees that have a more external focus, such as Residential Sales and Marketing, Fundraising and Web Oversight committees. From a strategic standpoint, all possible means and available resources should be focused directly on increasing memberships, community outreach and improving communications within and outside the organization, including the committees.

Streamlining the committee structure to create a more functional arrangement is needed to improve effectiveness. Some of the current committees are not actual committees (i.e., kee card and memory brick) and can be assumed by other committees. The Library Committee can be discontinued. The structure could also be reconfigured to allow the committees to be more closely aligned with the Board. A much simpler configuration would improve efficiency.

Appendix A provides a proposed reorganization of the committees. Under this reorganization, changes to the role of the committees would be required and committees would each be assigned to a board member. This would align committees with board goals, objectives and strategies necessary to meet the organizational mission.

According to La Piana Consulting, another scenario for committee restructuring is to reduce the number of committees to three: Internal Affairs, External Affairs and Governance. The three-committee structure has several potential advantages:

- Each board member need only serve on one committee at a time
- Fewer committees means fewer meetings, placing more focus on the tasks at hand rather than on meetings
- Accountability of the committees is more direct
- Board meetings can be organized around the three committees' reports, reinforcing the importance of their work

Committees often lack sufficient leadership. Many volunteers are reluctant to assume the responsibility of a committee chair position. A committee leadership role requires a time commitment and usually, a long-term commitment. Volunteers may be willing to work on a particular committee, but are not willing to lead it. It is also the case that committee chairs can remain on a committee nearly indefinitely, due to lack of available replacements. This can cause burn-out and may be preventing volunteers from assuming leadership roles.

There is no simple solution to improving the ability of the committees to retain members, or to find motivated and knowledgeable members. "Term limits" could be implemented, but this would lead to additional vacancies. Chairpersons could be provided with time off in between terms, but another member would need to fill in. It is advisable to create a subcommittee to examine the committees and make recommendations to the Board regarding potential improvements or changes.

Much of the future success of the organization depends on focusing its attention on committee functions to increase and promote memberships, volunteerism and revenue. As a result, what is ultimately decided regarding the committees structure and their management will likely have an impact on the organization. Recruitment of volunteers will be needed to fill critical committee roles. See Section 4 for specific committee strategies.

3.11 Volunteerism

Within DVRC, volunteers are utilized for a wide range of activities, programs and other uses. Volunteer recruitment and retention can often be difficult to sustain, partly due to the lack of a coordinated effort to manage and oversee volunteers. A volunteer management strategy is essential to building a team of volunteers. Successful volunteer management starts with a focus on the right tactics that can be geared toward active volunteer recruitment, strategic placement, relevant training, proper supervision, and meaningful recognition. A well-integrated volunteer management system ultimately leads to increased volunteer productivity, greater satisfaction, and longer-term volunteer retention.

A Volunteer Engagement Plan is a strategy used to nurture and maintain the volunteer program. This plan would provide for a better understanding of the volunteers and their needs, wants and desires. Prioritizing community building as a strategy for improving the volunteer base would direct vital organizational resources toward the importance of the volunteer program. In order to effectively engage volunteers it is necessary to get to know them as individuals and understand their preferences and abilities.

When there is a better understanding about volunteers, the organization can improve its outreach to provide them with information and the opportunities that are most compelling to them. It has been noted during this process that, in general, volunteers do not come forward on their own accord but will often volunteer when asked to do so. This requires calling volunteers on a consistent basis and rotating volunteers accordingly.

Engaging volunteers through email campaigns, social media and events are effective methods for reaching out to the community. It is important to not only reach out to recruit new volunteers, but to also focus on those members who have volunteered in the past. Volunteer retention is important since these people have the necessary experience, knowledge and expertise about the organization.

The need for a back-up system or a systematic method and process for utilizing volunteers is necessary. The current system of one individual maintaining a notebook in their home is ineffective and burdensome on those who, by default, “end up with it.” There is a need to

circulate volunteers and to allow committee chairpersons to utilize the list for their own use when volunteers are needed. Strategies pertaining to volunteerism are presented in Section 4.

3.12 Memberships

Reaching a broad consensus about the future of Dreamland Villa will require resident participation and large-scale organizational commitment to address membership needs. The solutions to meet the financial needs and number of memberships required will likely require a mix of approaches and applications.

The community is divided into two camps: members and non-members. Since dues are voluntary and membership is optional, residents can choose whether or not they want to support the organization. As a result of this, there are no easy fixes. It becomes primarily a question of improving outreach to the greater community, and/or increasing dues. Since memberships are tied directly to income, reaching out to those who don't pay dues is at the heart of increasing memberships. However, this can be problematic. Going door-to-door is not practical and mailings are expensive. There is also the substantial time commitment and reliance on volunteers to fully implement outreach efforts.

It is necessary to consider a number of factors when developing long-range plans and decisions that could have a direct impact on the community. Below are a number of considerations to take into account:

- Residents who have lived in the community for a long time and may not be amenable to change
- Residents who are on fixed incomes and financially strapped may not pay
- There is a % of residents who will never become members
- Members who bought homes here specifically because of the 55+ overlay and not for the amenities place a different value on their membership
- Residents who bought homes here only for investment purposes
- Residents who don't care at all about the 55+ overlay

Making it easier to pay dues online and providing other online options, e.g., autopay, have merit and should be implemented to the extent feasible. Members are much more willing to pay when it is easy to do so. There could be direct correlation between monthly options and paying online automatically if there is a direct increase in memberships. This can be demonstrated. Once various online options are available, they should be advertised and promoted in every way possible to raise awareness of their availability.

Section 4: Core Strategies

4.1 Strategy Factors

This plan is the result of a participatory and collaborative process. The strategies developed through this process are the culmination of ideas, concepts and suggestions from residents, members, board members, staff, volunteers, committee members and activity leaders. In addition to the input received, numerous records and documents were examined and considerable research was conducted for this study. Strategies are found throughout the document and in the Lists of Strategies found in the Appendices. The Lists of Strategies have been grouped into the following eight categories:

1. Volunteers
2. Committees
3. Membership
4. Governance/Administration
5. Office
6. Financial
7. Facilities
8. Maintenance

The strategies identified in this plan that may be considered a “laundry list” when addressing various needs within the organization. They are intended to provide guidance for decision-making, raising awareness, document preparation and to facilitate future planning needs. Cost factors and staffing have not been used to rule out any strategies since these can change over time. Some strategies are implementable immediately, while others may require action prior to implementation such as additional funding, personnel, or changes in policies or procedures. Additional strategies can be added to the plan at any time and implemented as needed. Strategies may also be modified to meet specific organizational needs.

Strategies ultimately chosen for implementation will depend on a variety of factors including cost, management, oversight, administrative capabilities and available resources. Careful consideration must be made prior to implementation of any strategies. It is not in the best interest of the organization to spend valuable time, effort and funding to move a strategy forward only to determine that there are not sufficient resources to implement that particular strategy.

To be successful, strategies must be effectively communicated throughout the organization. The best time to implement specific strategies is when the organizational mission and vision for the future are clear. This is primarily accomplished through prioritization and by establishing goals and objectives for strategy implementation.

4.2 DVRC Immediate Strategic Focus Areas

DVRC has immediate challenges before it as described in Section 3.2. These challenges must be met head on with focus and emphasis within the near future. Below is a list of some example strategies that may be considered to address some of these immediate challenges.

1. Prioritization of projects with timeframes and cost estimates for facilities and infrastructure
2. Develop and Implement a long-range financial plan
3. Develop and Implement a marketing plan
4. Establish objectives and goals for the year 2021 with a focus on the mission, dues and memberships
5. Send surveys to all households, including renters and owners
6. Use all available methods to internally and externally publicize DVRC positives
7. Prepare and distribute an annual report for members for the annual meeting
8. Develop and implement a volunteer plan
9. Improve electronic communications, website and social media efforts and programs
10. Implement work plans for committees
11. Evaluate the committee structure
12. Put together a team to assess facilities and grounds and hire professional services to evaluate the facilities and infrastructure
13. Conduct at least one deliberate membership drive during the high season
14. Begin work on a Membership Engagement Plan
15. Form a Task Force from the community to provide input for developing protocols for implementing a dues structure and increasing memberships

4.3 Strategic Focus Areas

In order to strategically assess community needs and address those needs DVRC must focus on its organizational processes, financial condition, use of human resources and the internal and external influences on the organization. Focus must be placed on two major objectives in the immediate future: (1) Determining and implementing a viable dues structure, (2) Increasing memberships, (3) Assessing the cost of capital improvements and maintenance of the facilities over the next ten years vs projected income. A concerted effort must be placed on these objectives in the near term.

Coming to agreement and consensus regarding these important matters is necessary before any further planning can be done regarding capital projects, raising dues or increasing members. Some ideas for approaching these objectives are included in this plan. However, it will take the Board to establish these as priorities to direct efforts toward developing the goals and objectives necessary for implementation.

Other specific strategies are necessary to address a number of other needs within the organization. Priorities for strategy implementation should be developed to meet organizational

needs over the next 3 – 5 years and beyond, with the ultimate goal of sustainability and durability of DVRC for years to come. This will require some difficult decisions to be made. Having facts, data, information and involvement from the community will facilitate making these decisions.

4.4 Strategy Lists and Appendices

See the following pages for the Lists of Strategies. They are organized by category, as described in Section 4.1.

Included in the appendices are:

- Appendix A- Proposed Committee Reorganization

- Appendix B - DVRC 2019 Cash Flow Report

- Appendix C - Map of Dreamland Villa

Strategies

Volunteer Strategies

Proposed Strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities
Develop and implement a volunteer program designed specifically at recruiting, retaining and engaging volunteers	Volunteers are essential to carrying out the DVRC mission	It will take leadership and volunteers willing to create and implement a robust and effective volunteer program	Make this a #1 priority in the organization. Seek individuals who are willing to take on this task and manage it; create a volunteer coordinator position; develop a Volunteer Management Plan
Develop and implement a comprehensive plan for volunteer engagement	A plan would provide the guidance and direction necessary for a comprehensive volunteer program	It will take volunteers to develop and leadership to oversee the planning and implementation	Make this task a high priority to dedicate time and effort to it; locate volunteers to coordinate the planning necessary to develop an effective and operational volunteer engagement plan
Implement methods for reaching out to residents as part of a plan to increase awareness of the need for volunteers	Many residents may be unaware of the fact that volunteers are essential to DVRC success	Communications with residents is difficult due to the cost of mailing and obstacles with developing relationships due to the large size of the community and the member-resident issue	Prioritizing outreach techniques to communicate with the greater community is important for a number of reasons; educating them on the critical need for volunteers is necessary to maintain DVRC programs and activities
Reduce burn-out of volunteers	The same volunteers are often used over and over again to keep programs and activities functioning	There are only so many volunteers in the available pool and only so many of those who are willing to take on certain roles and obligations	Initiate a volunteer program to provide a more systematic manner for recruiting and retaining volunteers; circulate volunteers on a regular basis to the extent feasible

Create and implement a volunteer coordinator position	A volunteer coordinator would oversee all volunteer activities; including recruitment, retention and training	A new paid position or volunteer position would need to be created; there is no existing plan or consideration of this	Make this a priority within the organization and include it in a Volunteer Engagement Plan to begin developing this as a “position” within the organization
Committees can help identify volunteers for needed positions; committees would focus on this as one of their duties	It is necessary to find every possible way to recruit and retain volunteers	There is no current plan, effort or emphasis placed on this as a viable method for engaging volunteers	All committees would be tasked with focusing on volunteerism and identify methods for reaching out to residents to promote volunteerism within the community
Need to create consistent and updated lists of volunteers & their specific interests and abilities; preferably electronic database	This strategy is consistent with the need to seek, maintain and track volunteers for various duties	The current system is flawed, due to lack of a better system to identify and track volunteers that is useful to the entire organization	Designate a specific position in the office for maintaining all volunteer lists, activity lists, and a volunteer tracking system
Institute a regular advertising campaign in print and social media to inform and educate the community about the need for volunteers	Using all tools available for attracting, recruiting and retaining volunteers is crucial	This would require an individual or committee to establish a program and process for advertising across various platforms; email, next door, website	Specify a manner in which all advertising about volunteers is accomplished, i.e., consistent Citizen articles, website announcements, email blasts. These communications need to be systematic, well organized and updated regularly to inform residents about what volunteers do and their importance to the organization
Tracking volunteers is a necessary part of a volunteer program in order to know who can do what, when are they needed, who do they report to, etc.	Keeping better records of volunteers is important for tracking and other purposes	There is no established program or process for accomplishing this; would require personnel and a reliable tracking system	This would need to be part of a Volunteer Management Plan. Place the volunteer list in the office and put an individual in charge of it so that the task of coordinating volunteers is not left up to one individual; develop an online method, database, for tracking volunteers; create a suitable method(s) to oversee all volunteer information and data,, tracking volunteer hours and activities will require a database for tracking purposes. There is a need for a back-up system

Hold monthly or quarterly meetings for volunteers to sign-up for volunteer opportunities, disseminate relevant information and to socialize	Regular meetings would help facilitate communications and invigorate the volunteer program	Would require a leader to assume the position to oversee it on a regular basis; volunteers would need to be willing to attend and be involved	Would require commitment on the part of the organization to emphasize the importance of volunteers and the contribution they make to the organization and that the organization values their work; this activity should become part of a Volunteer Management Plan.
Provide training and orientation for volunteers	Training volunteers is fundamental to a healthy volunteer program and provides them with necessary information	Would require a consistent training program with trainer(s)	Hire a consultant to conduct volunteer training seminars or train volunteers to conduct training sessions on a regular basis; this would likely require a volunteer coordinator within the community to oversee this process; should become part of a Volunteer Management Plan
Host volunteer recruitment events and fairs	DVRC can potentially locate volunteers through regularly scheduled events	Would require a commitment, consistency and volunteers put the events together on a regular basis	Volunteer programs should be seen as a need and not as an option within the organization; Place this as a high priority locate volunteers to commit to this; would be carried-out by a volunteer coordinator position; add to a Volunteer Management Plan
Always contact new volunteers immediately; (preferably in person) even if there is no current “job” for them to do; make sure volunteers get the jobs they signed up for	A consistent volunteer program is to the advantage of DVRC when recruiting volunteers	Due to a lack of oversight there is not enough follow-up to know if volunteers are being called and if they are doing the job they signed up to do so they are not discouraged from the beginning	Establish a volunteer coordinator position to oversee and manage volunteers; helps to ensure that when volunteers sign up for a job or project they are notified immediately and placed on a list and then called when needed to do what they signed up for; without a volunteer tracking system it is not possible to adequately plan for volunteer assistance; should be added to a Volunteer Management Plan
Members are willing to serve but are not being called upon; members often won’t come forward, they need to be called	A consistent volunteer program is to the advantage of DVRC to retain volunteers	Without oversight or a process in place it is difficult to call volunteers and add to the volunteer list & circulate	Establish a volunteer coordinator position to oversee volunteers; should be included in a Volunteer Management Plan

Develop Volunteer Activity Descriptions so that volunteers know what they are signing up for	DVRC can benefit from a standard format for volunteer planning and use	It will take time and effort to develop this list	A list would be relatively easy to do; need to discuss volunteer needs with all groups and activities that use volunteers to provide descriptions
Put Volunteer needs on the website and update regularly	The website can be an effective tool for members who would like to volunteer but don't know who to contact	The website committee is limited as to what it can effectively do	Place a priority on this to encourage volunteers to come forward; may require additional assistance to help manage on a regular basis
Survey volunteers to get their feedback	This could provide DVRC with valuable information concerning volunteers	Someone would need to develop the survey, provide it to volunteers and analyze the results	A survey could be prepared in advance of the next membership meeting; this would allow time for a survey form to be developed; once the format is developed it can be used over again for future research efforts
Improve communications with volunteers	Communications is necessary to improve messaging and PR	This is not easily implementable without a volunteer program and coordination/coordinator	Prioritize volunteerism within the organization; establish methods for reaching out to volunteers
Create a volunteer handbook	Knowledgeable volunteers are essential	Someone would be needed to create the handbook	Assign someone to create a booklet that would be easy and cost-effective to reproduce
Volunteer recognition	This is important to the organization	This is not easily implementable without a volunteer program and coordination/coordinator	Prioritize volunteerism within the organization to recognize volunteers annually, even if just a letter of thanks from the organization

Committee Strategies

Proposed Strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities
Eliminate unnecessary committees and streamline the structure for effectiveness	DVRC must rely on effective committees to provide the necessary work of the organization	It will require reassessing the committees; development of a new approach will require a different thought process	Place someone in charge of reviewing the committees and the structure; Policies and Procedures Committee should oversee this effort
Place committees under the auspices of board members	A direct relationship between the board and committees will facilitate communications	This places more expectations on board members and committee chairs	This actively promotes the greater need for connections between the board and committees; implement a test for a specified period of time to experiment with the idea
Keep committee members engaged and interested (also see volunteer program)	Without contented committee members the committees are not as productive	Requires a specific coordinator position	Begin a volunteer plan and program to engage volunteers to build a network and structure for keeping volunteers engaged
Implement written processes & establish procedures for committees	Standardization is to the advantage of the board and the committees	Requires development, implementation and carry-through	The board would need to make this a standard business process with written directives
Conduct regular meetings for committee chairs to share ideas and find solutions to common problems	Regular meetings encourages communication & sharing of ideas, fundamental to the DVRC mission	It is challenging to get committee members to commit to additional meetings on a regular basis	Identify a volunteer to oversee this effort, encourage attendance through meetings that are engaging and fun and have a purpose with stated goals

Match committees with members who possess necessary skills and experience	Locating appropriate committee members and chairs is necessary for committees; volunteers fitted to a committee best suited for them is the desired outcome	Implementing this strategy requires a concerted effort to identify volunteers for committees to match skills and interests; more consistent advertising and publicizing would be necessary	This would require someone, or a committee, to oversee. Would require putting a plan in place to provide the guidance necessary for accomplishing this
Hold orientations and training for new committee members to educate them about the organization and how to manage effective committees	Training and developing new committee members is in the best interest of meeting the DVRC mission	There is no program in place with a process for orientations, or for training committee members	Establish a policy for training and orienting committee members to demonstrate the importance placed on committees; educating members about the organization is vital to keeping members engaged and able to represent the organization and meet the requirements of the committee
Develop an annual work plan for each committee to ensure committees are working in conjunction with the goals & objectives of the board	Develops consistency among committees and ensures a common end is being met	There is currently no one available on staff or a volunteer to develop and implement annual work plans	Work plans are specific to each committee, but also include standard language regarding the organization; they can be “canned” for use over and over; locate a volunteer to develop these for each committee
Initiate a vigorous advertising and promotional campaign on the website, Citizen et al, for recruitment of committee members and chairs and encourage participation	DVRC can benefit from well-functioning committees and locating members to serve on those committees	There is no consistent volunteer campaign undertaken by DVRC to find volunteers to assume critical roles within the organization	A process for appealing to residents can be instituted; reaching out to the broader community for volunteers would be necessary
Monitoring committees on a regular basis will help ensure consistency with messaging and improve the committee – board relationship	Showing that the organization cares about what committees are doing is important to meeting the mission	There would be a need for someone in the organization to implement a process for consistently following up with committees to make sure they have the resources they need, etc.	Placing an emphasis on committees within the organization will facilitate and improve the overall management of the committees, as well as consistency and messaging; monitoring committees can be aided by assigning committees to each board member.

Ask chairpersons annually if they are willing to continue, and ask how things are working for them, etc.	Discussing situations with committee chairs will facilitate communications and help eliminate burn-out and volunteer fatigue	Would require an individual willing to assume this responsibility; there is no organizational structure in place for overseeing committee processes and duties	Providing committee chairs and members with options and relating to them about their situations will help enable information exchange and assessing committee needs
Have committee chairs serve two years at a time with a one year break after that; or develop a system whereby committee chairs and members can rotate or find respite	Chairpersons are often unable to give up their chair position because there is no one else to take over	It is improbable that instituting a rotation process would provide the solution to this problem because of the lack of volunteers to fill these positions	To implement a system that will give committee chairs and members a break will require further analysis and examination into possible options, options for filling vital committee roles are limited, but necessary to ensure that volunteers are not overextending themselves for long periods of time
Recognition for committees and committee chairs	Occasional recognition for the work and efforts of committees is a necessary part of an organization	There is no person responsible for volunteers to assume this responsibility	Place more emphasis on the need to recognize volunteers and the work of the committees to improve morale and show appreciation; integrate a recognition process into the organization
Develop a process for addressing committee needs to improve communications and gain a better understanding of what adjustments might be necessary for improvements with the committees; committees are often left to their own devices; leading to lackluster performance and a lack of initiative	This strategy places importance on committee effectiveness – the need to be “in tune” with the committees in order to help focus attention on their significance to the mission of the organization	This would require a process or program and possibly a volunteer to assume the responsibility who is familiar with the needs and issues of the committees and can develop, implement and maintain a process sufficient for achieving this goal	Development of a program or process to assess the needs of the committees would likely be required; this may also require a volunteer; this process would require interacting with the committees and providing feedback and assistance toward making necessary improvements and adjustments on a regular basis

Develop and post an annual <i>calendar for committees at the beginning of the year</i> ; make sure committee members know when meetings are and what is expected of them	This strategy will help committees plan in advance and be able to adequately prepare for planned activities and events; this advances the need to improve communications within the organization	There is no individual assigned to this to make sure it occurs	Develop a procedure for involving the committees on an annual basis to keep them informed of important organizational events, happenings, activities, etc.
Clarify the internal and external functions of the committees to direct them towards board objectives	The board and committees need to be on the same page	There is no written work plan for the committees	Develop and implement a written work plan

Membership Strategies

Proposed Strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities
Streamline the member renewal process to the extent possible	The easier it is to renew existing memberships, the more people are likely to remain members	There are limitations to the time that office staff can dedicate to this; it involves technology to implement & maintain	Ensure that enough personnel are trained to implement and maintain the member renewal process; requires that the latest technologies are made available
Track memberships over time to collect and analyze data	Data collection is valuable to better understand the community in order to attract new members	No structure is in place to accomplish this on a long-term basis; currently there are no goals or objectives to move this forward	Train volunteers to collect data and conduct data analysis on a regular basis
Hold regular membership events to help retain and recruit new members	This would support the need to improve membership numbers in the long-term	No structure in place to hold member-only events on a regular and routine basis; currently there are no goals or objectives to move this forward	Make this an annual objective/goal; determine and plan events well in advance
Initiate a dedicated Membership Committee to oversee all membership related duties (Membership Engagement Program)	Would place an emphasis on memberships throughout the organization	Volunteers to chair and participate are needed, especially on a long-term basis, currently there is no membership committee dedicated to this task	Create a membership committee to develop long-range plans for increasing members & to focus on implementing membership and marketing strategies

Reinvigorate the welcoming committee to welcome & introduce new residents to the community	Provides a mechanism for greeting new residents	Difficult to implement in the long-term; requires volunteers to go door to door, to create giveaways	Place importance on welcoming new members by establishing annual goals & objectives and making this a priority; involves the welcoming committee
Hold resident meetings once or twice annually (fall and spring)	Having meetings open to all residents may encourage membership	Would require commitment and volunteers to establish a routine process; current policies do not encourage residents to attend DVRC meetings	Develop and implement methods for engaging residents in order to educate them about membership and DVRC
Hold specified membership drive(s) during the year; possibly hold twice a year (fall and spring)	There is a need for this to promote the benefits of memberships	Difficult to implement on a routine basis; there is no established mechanism for doing this; requires intensive volunteer effort	Construct a recognizable membership booth that is easy to relocate and store; develop methods for member drives such utilizing a “thermometer” to measure goals, banners, flyers, mailings, etc. Plan membership drives well in advance,); could coincide with a free meal for members, for example
Create a member-only page on the DVRC website to improve efficiency and communication by providing online opportunities	Members would have access to a members-only page for their personal information and to pay dues; this is in keeping with contemporary business methods	Ensure that the necessary technologies are available	Establish a priority for implementation once all the preliminary requirements are in place
Create customized member reports that are easily accessible and available on the website and by print media	Focus on communications with members to provide information to them on a consistent basis	Customized member reports are time consuming to prepare and distribute; there is no current process; would require a budget	Determine who would assume this job; establish a budget and create a system for developing and disseminating reports and data to members via various formats

Survey homeowners every several years to collect data	Obtain data to gain a better understanding of the community over time	Establishing a process for this is needed, as well as people to commit to it	Understand the need and importance for data; prioritize data collection and assessment efforts; establish a formal process
Collect demographic data from new residents to assess their wants, needs and desires	Obtaining specific information about new residents is beneficial to the organization over time	Establishing a process for this would be needed, as well as volunteers to commit to it regularly	Prioritize the need for data collection efforts and methods
Host member-only events throughout the year to show gratitude to members and make them feel appreciated	Provides special advantages and benefits for members to recognize and acknowledge their willingness to remain members	This is difficult to implement because of lack of volunteers; the need for planning, a budget would be needed	Would require a commitment since it would take extensive effort to implement on a routine basis and a regular budget would need to be developed
Provide an annual membership report at the annual meeting to keep members informed about the organization	Keeping members adequately informed is essential to both the membership and the organization	Need to prepare the report, gather the necessary information and pay for printing costs, if needed	Involves developing the data and information throughout the year and on the development and format of an annual report; might need to be only a few pages
Institute vigorous marketing strategies to attract new members and retain existing members	Marketing is an extremely useful tool for increasing memberships by communicating with the community	There is no program in place to maintain an ongoing marketing program	Develop a marketing plan in-house; include strategies for reaching out to realtors, members and residents
Allow the two activity halls to be rented out to members at no cost or for a nominal fee	Providing members with as many benefits as possible is in the best interest of the organization	Remove any restrictions to implementing this strategy	Provide and advertise this to members as a benefit to them for their loyalty and membership
Improvements to the membership process	Streamline all membership processes to the extent possible	Requires a review of the current processes by volunteers and to develop methods for implementation	Make it a priority to have as much of the membership processes online as possible and to review current processes

Improve all forms of communication methods to more fully engage members and residents	In order to demonstrate that DVRC appreciates its members, a substantial communications program is needed	Improving communications is problematic due to lack of funds and volunteers	Communications is a key factor to improving outreach to the greater community; consider making internal structural changes to address this
Educate members and residents on various payment methods available and regularly advertise this benefit	This is important for educating residents in order to increase memberships	Due to lack of staff, volunteers and funding, it is difficult to prepare articles, send mailings, flyers, etc. to inform members about options	Recognize the importance of this and its benefits to the members, residents and organization; develop methods for implementing various advertising campaigns and marketing strategies
Survey and interview other similar communities to determine how they are encouraging participation, volunteerism, etc.	This provides information that could benefit DVRC	It would require volunteers and a plan with methodologies that can be put into action	This would not be a regular event; only once or twice with two or possibly three other similar organizations
Create a business & marketing plan for promoting the community and to effectuate brand recognition and increase memberships	Improves the credibility of DVRC and focuses on memberships	It would need to be determined who would produce a plan and follow through	This is a valuable tool that could be beneficial to DVRC by developing processes and programs for obtaining new members and retaining members; would require assigning people to initiate this, or a team of volunteers
Publicize payment plans through online communications and print media (Citizen); regularly announce new payment options and encourage residents to become members through specific media campaigns	Instituting a rigorous ad campaign and developing promotional materials about the positive aspects of membership	Would require effort and a significant time commitment on an ongoing basis; there is no one assigned to this to make it happen	If membership is the highest priority, then all attempts should be made to publicize DVRC's benefits. This could possibly be accomplished through a corporate donor with access to graphic artist and skilled marketing people

Improve methods of communications and automate member communications to the extent feasible	Communications is at the heart of building memberships and relationships; automate communications as much as possible and develop consistent means of contacting members	Improving the adequacy of communications is difficult given the current organizational structure and lack of volunteers	Place importance on this as a high priority within the organization; establish methods, goals and objectives; initiate a communications committee that would oversee the web, Citizen, social media, ensure continuity across platforms
Improve the collection of data from new members	Determining the wants, needs and desires of new members is essential	Difficult to reach out to all new members on a consistent basis	Implement a survey system to be sent to each new member; this could also be a welcoming tool

Governance/Administrative Strategies (Board of Directors)

Proposed Strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities
Create a Succession Plan for board members, volunteers and personnel; consider all relevant factors involved with succession planning	The office and maintenance are essential operations; any loss in personnel affects day-to-day business and the delivery of services	Determining how the plan will be created, by whom, and what decisions are needed; would involve the Personnel Committee	A succession plan protects the organization and should be given a high priority, with a due date for completion; assign the Personnel Committee to develop a draft for Board review
Develop and implement standard methods for the recruitment of qualified candidates to the Board	Qualified persons are needed to serve on the board	Would require someone to develop recruitment standards in writing; e.g., Personnel Committee; developing standards would require community outreach which is time-consuming and laborious	Recruitment standards would include such things as developing an active & ongoing campaign to recruit and locate potential candidates through community outreach programs and processes throughout the year
Consider the option of opening board meetings and other DVRC meetings to residents, but with limited privileges	The organization would benefit from new ideas and potentially gain new members	Some members might be opposed to this especially if nonmembers are allowed to have a "voice" in decisions	Could benefit the community in the long-run; some nonmembers may learn the benefits of membership by attending DVRC meetings
Develop and implement <i>New Board Member</i> orientation packets & create a canned orientation session online or by video	This enhances the board experience and prepares board members	Creating, maintaining and updating new packets and a video and or online session could be administratively difficult to achieve	Appoint a member from the Personnel Committee to oversee development and implement resources to accomplish this. Once it is up and running it will require less work to maintain in the long-term

Update the bylaws to eliminate outdated bylaws that no longer serve the organization	This has been discussed by the Board and there is agreement this needs to occur	Finding extra time to devote to updating the bylaws	Appoint a lead person from Policies and Procedures committee to formulate a schedule for meetings with agendas and relevant information and have a completion date; locate volunteers to serve
Hold supplementary board meetings as needed to discuss financial plans, priorities, goals and objectives	To enhance and improve communications is vital to meeting the mission of the organization	Additional meetings require more work and time; all board members should be involved	Schedule meetings in advance throughout the season to prioritize financial matters and to develop goals and objectives for the following year. Delegate the leg-work to a committee or subcommittee to report back to the Board with results in a given time-frame
Hire a paid executive director/administrator to oversee all administrative functions, programs and operations	There is a "gap" in the system to oversee administrative matters	Cost of an administrator is cost prohibitive	Hiring a temporary and/or part-time administrator could provide an idea of how this might work, if it would be effective, and what it might cost; hire a college student who needs the experience
Changing the annual meeting date to February - this is in the works	This is in the best interest of DVRC	Advance notification to the membership is needed	This will ensure that those who pay fees late will need to pay before attending the annual meeting; this also provides the office and Board more time to prepare
Hire a marketing specialist , &/or develop and implement a marketing plan	A focus on marketing would be beneficial to organize, execute, and track effective marketing strategies inside and outside the organization	A marketing budget would be required; a position would need to be funded, or find a volunteer to assume the role; development of a plan may be done in-house with qualified people	Assess the costs of hiring a marketing specialist to create marketing goals; involve the sales and marketing committee; a marketing position would provide expertise with developing marketing strategies; someone is needed to prepare, implement and oversee a marketing plan
Increase the fee paid by non-residents to participate in DVRC activities	This would give members more "benefit" to their memberships	There may be disagreement about raising the minimum for non-residents; currently set at \$10/month for first activity, \$5/month for subsequent activity	Would require board approval and a consensus by the activity rooms, members and others

Charge activity rooms, clubs and groups to pay into the DVRC general fund	This could generate income to help pay for room usage, i.e., electric, water, etc.	There might be push-back to this by some activities; and from members since they already pay a fee	Need to determine how much income would be generated by this. Propose a plan and present it to the activity rooms, members and other interested parties to get feedback
Evaluate all Wi-Fi and internet systems throughout the Read Hall campus and Farnsworth Hall for consistency, reliability and cost effectiveness	Uniformity throughout both campuses would eliminate conjecture about the internet usage and needs	This would likely require an expenditure to obtain an expert evaluation of both campuses	The computer club could assist the Board with this endeavor
Implement incentives for board members	It is in the best interest of DVRC to make the board more "attractive" to obtain and retain qualified candidates	Instituting incentives is difficult due to lack of funding; may also have undesirable consequences	This would require additional study to determine the pros and cons and determine how the membership would feel
Briefing papers for board members as standard protocol at board meetings	A well-informed board is necessary for discussions and decision-making	There is no one to produce briefing papers for board members prior to each meeting	Prioritizing this will facilitate the productivity of board meetings; requires board discussion to determine how this can be accomplished
Establish priorities, objectives and goals annually, and include in an annual report, along with accomplishments of previous year goals and objectives	Accountability and informing the members about accomplishments is good governance	Someone would need to prepare and track goals, objectives annually and prepare the information	Make this an annual commitment and manage meetings around these goals and objectives
Hold periodic strategy meetings throughout the year to discuss critical matters	Strategy meetings allows board members to freely discuss matters of importance	Strategy meetings would need to be scheduled in advance and preparation would be necessary	Strategy meetings do not cost anything extra for the amount of benefit the organization would receive; involve the strategic planning committee

Review policies and procedures on a regular basis and make necessary changes; provide changes in the annual report to members	It is more efficient to keep current in order to avoid confusion and miscommunication	It is time consuming to undertake this task	Schedule regular meetings of the policy and procedures committee to tackle this; recruit new members to the committee
Consider holding a board retreat once a year, or periodically	A retreat allows the board to get better acquainted and form connections with each other	Would require expenditures for a meeting room, food, etc.; would require a time commitment	If made a priority, based on its benefits to board productivity then it is worthwhile to pursue; the potential benefits could be significant
Implement specific by-laws for making effective decisions	When difficult decisions need to be made, there should be a process in place for this purpose	May not be satisfactory to some board members to make this change in the decision-making process	Could reduce pressure on board members when having to make tough choices and difficult decisions
Develop an annual report to members to provide at the annual meeting	Making members the #1 priority is achieved by providing them with information and including them in the process	Producing an annual report is time consuming; there is no one assigned to accomplish this	Producing an annual report does not have to be a major undertaking, only a few pages with relevant data and other current information included would go a long way toward informing the membership about DVRC activities and actions
Develop a general operations manual - a complete reference work that stores the organizational "know-how" for specific practices	A manual would be a resource for board members, employees. & volunteers	Producing a manual of this sort would be time consuming; there is no one to produce it	Creating this manual puts together all relevant information for the organization "in one place" where the information is readily available for reference; some of this is already arranged; could piggy-back onto preparation of a succession plan; could be a physical document and/or online
Establish a policy to notify members in advance of any proposed dues increases or other proposals to increase revenue	A policy would be helpful to members; improves communications	An individual would need to be assigned to prepare the information in a format understandable by the membership	This is needed to better educate and inform the membership about the annual dues; involves Policies and Procedures Committee

When a home is first purchased there needs to be more follow-through and communications	Making things easier for landlords is beneficial to DVRC	It is difficult to find enough volunteers willing to do this on a regular basis	Make this a routine practice so that it becomes standard procedure in the office
Target annual solicitation letter to two audiences: (1) owners, (2) renters; to promote paying fees to help keep the community 55+	Communication with landlords and tenants will help facilitate membership	This needs a time commitment by the office on an annual basis	Make this a routine practice so that it becomes standard procedure in the office; aim letter to owners on the importance of paying the dues to maintain the 55+ (adds value to homes) and focus on the benefit of prorated membership with all amenities available for new members
Determine actual ownership for all the larger rental complexes regarding the 55+ overlay and accurate records in the PMS.	Making connections with the apartments will help build relationships	This would be a time consuming activity for the office and volunteers and would need to be done on a regular basis	Accuracy in the PMS system is needed to ensure compliance with the 55+ requirements; determine a methodology for accomplishing this and then define how to accomplish it.
Change the Policies and Procedures to make it possible for a landlord to transfer an annual membership (paid by the landlord) from one member to another when a tenant vacates a premises	This is a good-will measure to facilitate increasing members	This would require a change in the Policies and Procedures	Have the Policy and Procedures Committee bring this forward to the membership for consideration.
Identify which units are lacking information regarding tenants, or have not had the age verification updated in the last two years; reach out to landlords regarding any missing information	Develops information in the PMS system and helps ensure the system is current	This would be a time consuming activity for the office and volunteers and would need to be done on a regular basis	Accuracy in the PMS system is needed to ensure compliance with the 55+ requirements; determine a methodology for accomplishing this and then define how to accomplish it.

Prepare a “welcome package” from DVRC to new tenants and provide to landlords to distribute via by mail or volunteers	Promoting communication between DVRC and new tenants is needed	This would be a time consuming activity for the office and volunteers and would need to be done on a regular basis	This could become part of the responsibility of the welcoming committee in conjunction with the office. Determine how this can be accomplished and make it a routine and systematic practice; put someone in charge of it.
Reach out to landlords via letters, email, phone calls and personal visits regarding steps DVRC is taking to make reporting easier for them, etc.	Developing relationships with landlords helps to educate them and may promote DVRC	This would be a time consuming activity for the office and volunteers and would need to be done on a regular basis	This could be done by the office at least annually. The office could utilize the help of volunteers. Make this a regular and systematic practice.
During annual member drives, reach out to all landlords regarding the value-added benefit of their rental homes when they pay part or all of the annual fees for their tenants.	Developing relationships with landlords helps to educate them and may promote DVRC	This would be a time consuming activity for the office and volunteers and would need to be done on a regular basis	This could be done by the office at least annually. The office could utilize the help of volunteers. Make this a regular and systematic practice.

Office Strategies

Proposed Strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities
Develop a routine process for gathering email addresses from residents	Email is mentioned as a preferred method of communications by members; it is a cost effective method for reaching out to the community	It is time consuming to obtain current and correct email addresses and maintain accuracy over time	Once standard processes are in place the practice will become more routine; take advantage of obtaining email addresses at the annual meeting and at other opportunities.
Integrating the electronic ticket sales program; up and running in 2019; There is a Box Office Procedures Manual for this	Electronic ticket sales for events help generate income with less volunteer involvement	It will take time to establish consistency and processes that ensures a seamless routine; training volunteers to assume ticket sales duties, ensuring ticket sales are compatible with other venues and those used by DVRC; computerize sales to the extent feasible	Put processes in place to ensure that ticket sales are efficient, effective and consistent with industry practices
Install QuickBooks accounting software to facilitate uniformity with industry standards	Improvements to the existing accounting system is needed to keep current with industry standards and to ensure reliability	Costs of new software and training	Establish processes and practices to ensure Q/C and protocols in place to meet industry standards

Install new phone system in the office	The phone system must function for members, residents, ticket sales and other office functions	Cost to purchase new system and train personnel and volunteers	Prepare a scope of work for the required system, budget and timeframe for implementation
Develop ideas for office redesign & upgrades	The office is the “face” of the organization	Obtaining cost estimates and agreement on office design and costs	A design can be developed over time to accomplish this, begin to generate ideas and design concepts; hold a contest within the community to gather ideas; also consider storage options
Develop and implement an emergency and evacuation plan; include training and signage – this is underway	This is in the best interest of the organization and its members	It will take time to develop the plan; requires office and maintenance coordination	Needs to include both campuses and should address all medial resources and possibilities; e.g., there is no “call button” in the exercise room in the event of an emergency, emergencies at outdoor areas and during off hours.
Consider hiring a website manager	The website is a cost effective way of reaching out to the community	There are various obstacles to implementation of this; e.g., cost and ongoing maintenance; uncertain who would manage it internally	Placing a priority on this to develop the kind of online presence desired by the community and is representative of the community is needed; there is member support for this. could be cost prohibitive, need to determine costs from web experts
Create an Employee Handbook specific to DVRC operations (office and maintenance); include volunteers as well as employees	This is in the best interest of the organization	There is no one assigned to produce a manual	Assign this to the Personnel Committee, or to volunteers willing to put it together; this is beneficial because it introduces new employees and volunteers to the mission, policies benefits, and the “company culture”
Certify QA/QC in a written plan so that individuals with office access cannot manipulate or modify data and information	This effort is underway; needs to be enhanced to ensure protection of data and to ease transition of critical personnel	Oversight assures that board members or office personnel cannot manipulate or make changes to records, methods, procedures, data or other important processes	It is recommended that an outside professional evaluate and put safeguards in place to prevent tampering of official documents and data and other information

Financial Strategies

Proposed Strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities
Obtain accurate cost estimates for capital improvements of facilities	Knowing what the future estimated costs are will facilitate budgeting & the development of a long-term plan	Could cost to obtain the necessary estimates; would require a time commitment to develop	Recognizing the importance of cost estimating and providing information to the membership is the Board's fiduciary duty
Develop a list of needed and desired capital improvements in priority order, with costs and a timeframe for implementation	Obtaining a realistic picture of what projects are needed and desired is important to meeting the DVRC mission	Will require a time commitment and potentially professional services to obtain accurate data	Recognizing this as a need in order to report the results to the membership is the fiduciary duty of the Board
Develop a justification for increasing member dues and what that amount should be, and the timing of increases	Improves the credibility of DVRC and recognizes the need for rationale to increase the dues	There may be disagreement as to when dues should be increased and how often	Create a standardized process for dues increases based on data and information; this is a fiduciary duty of the Board and is responsible management
Assess a tiered dues structure	Could potentially create more income	A significant number of residents may choose to pay the lesser amount(s), causing a decrease in annual revenue	More data and information is needed to assess this; e.g., would this method persuade those who would otherwise not pay anything begin paying something? How many would still pay the greater amount?
Develop a long-range financial plan 5 – 10 years for maintenance and capital improvements	Improves the credibility of DVRC and recognizes the need for accurate data and projections	Would require professional services	Planning for long-term needs is crucial when developing budgets and for determining how much should be set aside monthly or annually for future financial needs

Increase fundraising efforts to increase the capital fund	This helps meet the mission of the DVRC	This requires extensive use of volunteers, planning other use of limited resources, may not raise the kind of funds necessary	Track all funds raised by all activities, aside from memberships to evaluate fundraising efforts, must be weighed against other needs
Develop and implement a process and policy for Restricted Funds	The more streamlined the financial process is, better for the business and members	Members may not be in favor of restrictions	A more systematic process is needed for restricted accounts. With limited funding, all funds need to go toward the goals and objectives established by the Board. "Pet projects" can be handled in different manner
Improve the review and approval process for development of the annual budget	The more streamlined the process is, the better for the business and members	Will take time and effort to accomplish this	Transparency to the membership is needed; make sure that all processes related to the budget are stated in appropriate policy
The current accounting system is set up to track costs by category, not by facility; there is not a specific budget for maintenance or for the office to track expenses related to operations; obtain a clear picture of the full costs of operating programs and services	Accounting and tracking is necessary for board members and others to have necessary information to make informed decisions	Accounting information is difficult to produce in various formats	Evaluate the current accounting systems and tracking methods; assess any benefits of restructuring to ensure efficiency and effectiveness based on types of data needed and what format it should be to facilitate decision-making

Facility and Infrastructure Strategies (Capital Improvements and Maintenance)

Strategies	Strategy Description/Implementation
Develop a Project Priority List with schedules and estimated costs for capital improvements of facilities; differentiate between needs, wants and desires; don't separate the list based on the facility	This must be given a high priority to develop a list for capital improvement projects for a long-range funding plan; forms with project lists are located in the strategic plan
Facilities Management Plan (FMP) aka, Facilities Master Plan	This document describes the facilities, their purpose and future plans. Used to plan all aspects of the facilities and the potential costs; outlines how the facilities would be utilized in accordance with the strategic plan and how projects could be successfully implemented. An FMP would include prioritized and desired projects, as well as maintenance needs.
Capital Improvement Plan (CIP)	A Capital Improvement Plan (CIP) would identify necessary capital projects, propose an implementation schedule and develop project priorities. A CIP would include estimated costs over a ten-year period
Facility Condition Assessment (FAC)	Assesses all assets and would focus on future needs and costs of maintenance and facility improvements over the next ten years; would analyze the current condition of the facilities, assess costs of upkeep and factor in estimated capital that might be required in the long-term
Update the 2011 Reserve Report	A reserve report estimates the useful life, replacement schedule and replacement costs of the physical assets, and includes a financial analysis. It is essentially a long-term capital budgeting and planning tool for capital assets
Establish a Capital Improvement Subcommittee, with bylaws, to define how decisions would be made	A Capital Planning Subcommittee would take an inventory of the facilities and evaluate previously approved, unimplemented or incomplete projects. Would obtain estimates for future capital improvements and identify future projected costs; develop a list of prioritized projects based on need and cost factors; would consist of maintenance personnel, experienced volunteers, board members and planners. This subcommittee could assist with any of the studies and planning efforts deemed necessary.
Perform a cost/benefit, or revenue analysis for Farnsworth Hall	This analysis looks at the relationship between cost and revenue; essentially a process used to measure the benefits of a decision or taking action minus the costs associated with taking that

	action, compare operating costs vs. funds raised through events; examine usage vs. cost of use
Develop and implement a management plan for Farnsworth Hall	Implement a more systematic and efficient approach to operating Farnsworth Hall
Create a vision and plans for remodeling and upgrades at all desired facilities; prepare a written strategy plan (short-term, medium range & long-term); include an action plan, goals and objectives for reaching conclusions of desired outcomes	This process would accompany the Project Priority List for planning and evaluating costs for remodeling and updating facilities
Evaluate Outdoor Areas to meet future needs	Pools, spas and activity areas will likely require work in the coming years; include costs design and beautification ideas and proposed changes in usage, include needs for outdoor equipment such as shade tents, picnic tables and lounging areas
Repurpose the Library building	The library will need to be repurposed for DVRC member use or to generate income. Design and cost estimates are needed, depending on what is finally decided
Grounds – Pools, hot tubs, parking lots, sidewalks, activity areas, landscaping, beautification and enhancements, building exteriors	Assess the future requirements for capital improvements and maintenance of the grounds and building exteriors and prioritize; hire professional services where necessary to obtain realistic cost estimates

Ideas for Facilities - Activities and Room Usage (also see list in Table 7)

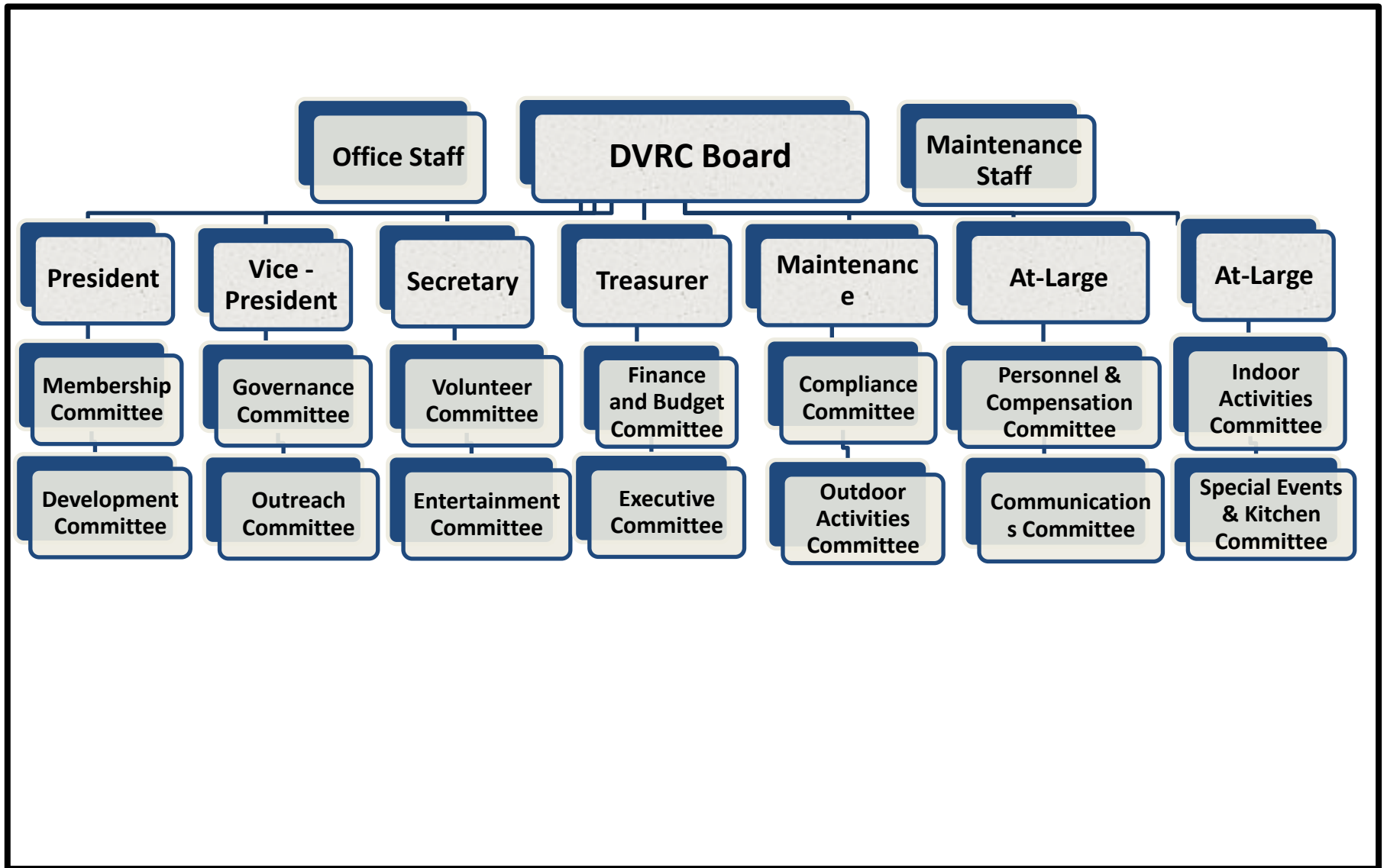
Evaluate the need for and cost of shade tents, picnic tables, lounging areas, etc., at outdoor activity areas
Make direct access to and from the pool area to modernize pool area at Read Hall
Enlarge the weight room
Create a dog park at the empty lot near Read Hall
Remove the shuffleboard courts and create a shelter for picnic area with tables and an outdoor serving area; consider a bar, food set-up area for happy hours, social gatherings and outdoor events

Maintenance and Grounds Strategies

Proposed Strategy	Assumptions, facts, and values that support this proposed strategy	What possible obstacles do we face in implementing this strategy?	How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities
Create a full-time, permanent paid maintenance supervisor (foreman) position	A paid supervisor would be accountable to DVRC; have regularly scheduled work hours and function as part of the team	There are no funds in the budget for hiring additional personnel	Developing a long-term maintenance plan to identify needs would provide necessary information; for personnel needs and costs, such as for a supervisor position
Develop a process for the office and maintenance to collaborate on a monthly spreadsheet for maintenance needs, expenditures, project plans and schedules	Tracking expenses and projects electronically will assist with communications and potential cost savings; reporting is useful to the board and the treasurer; will improve efficiency and effectiveness	Obstacles are with devoting the hours needed to create and maintain a monthly maintenance spreadsheet	Prioritize maintenance project tracking to accurately assess maintenance needs and projects; place as a high priority by the Board to ensure that information is kept for maintenance projects, costs, personnel needs, equipment needs, and facilities
Create a system for prioritizing and scheduling annual maintenance projects with completion dates for tracking purposes	Maintenance scheduling and tracking projects on an annual basis is an invaluable tool for tracking preventative maintenance	There is not enough maintenance staff to create and maintain a reliable tracking system on an annual basis	Place this as a high priority by the Board to ensure that the board is given information annually regarding maintenance projects, costs, personnel & equipment needs and facilities maintenance Include preventative maintenance performed on buildings: HVAC, plumbing, electrical, roofs, pools, hot tubs and other mechanical systems
Create a reliable tracking system for pool & hot tub maintenance	Data gathering is vital to knowing overall costs and having immediate reference to when routine	There is not enough maintenance staff to create and maintain a reliable	Establish a high priority for tracking work and the need for having immediate access to information

	maintenance should be scheduled	tracking system for pool and spa expenditures & needs	
Monitor wages of all maintenance personnel to ensure consistency with industry standards; increase wages accordingly	Retaining good employees is vital to the success of the organization	Lack of funding to adequately compensate maintenance personnel	Conduct an analysis of other similar communities and their maintenance compensation programs
Create a Facilities Management Plan (FMP)	A plan would provide the board with a comprehensive examination of maintenance needs	Creating a plan would take time and effort and would need to be maintained on a regular basis	Development of a maintenance plan would provide the basis for long-term planning, decision-making and assessing long-term needs (also see Facility Strategies and the strategic plan)
Green Infrastructure - target areas for possible greening options (landscaping, water conservation, recycling, construction, vehicles, & facilities)	Evaluating areas that could benefit from green technologies could potentially save money in the long-run	Greening can potentially cost more upfront, but have more long-term economic and other benefits	It is in the best interest of DVRC to become educated on greening and how these might be incorporated into the long term plans
Create a maintenance checklist for projects	Would provide a simple method for identifying the status of maintenance projects	Would require development of a form and routine upkeep to keep it up to date	Prioritize maintenance functions with the notion of long-term accountability with a simple checklist of duties and accomplishments

Appendices



Proposed Standing Committees
Descriptions and Board Oversight Responsibility

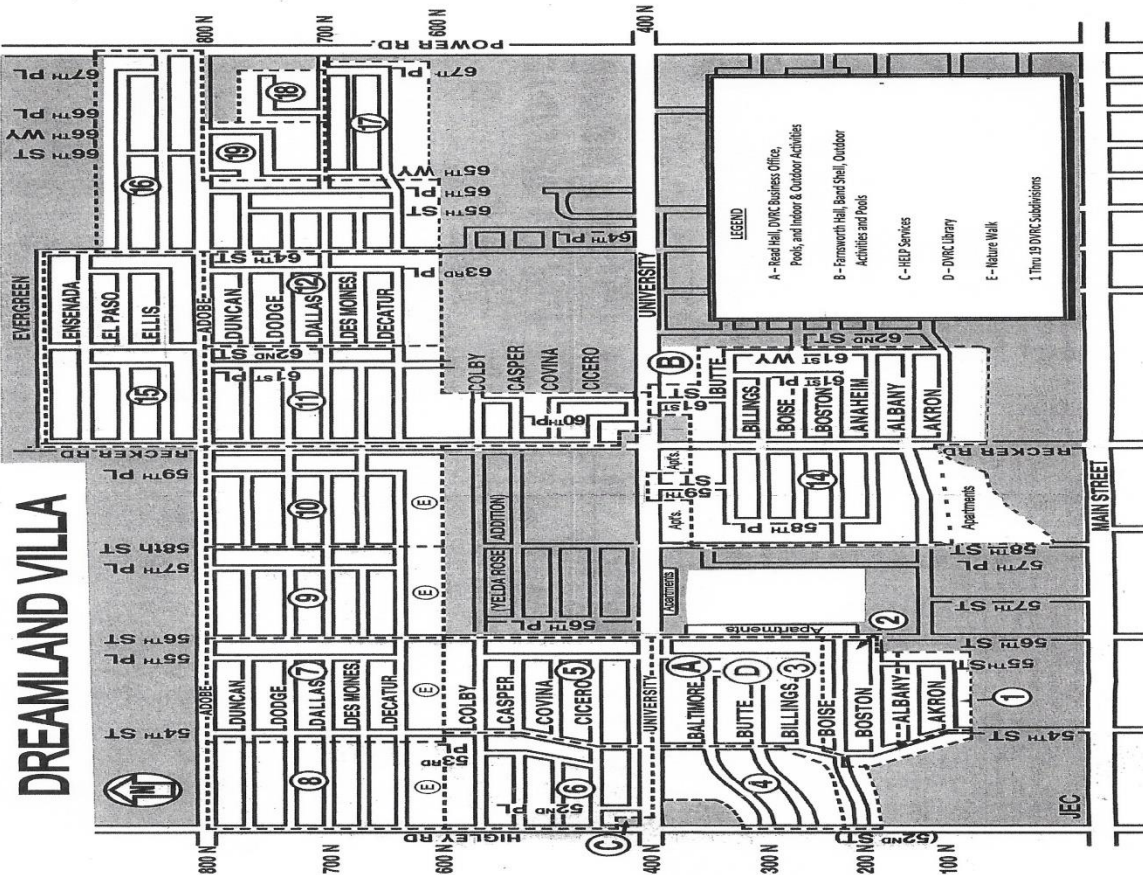
#	Committee Name	Responsible Board Member	Primary Committee Responsibilities & Duties
1	Membership Committee	President	Manage the Membership program; hold annual membership drives, manage kee cards, track member data in conjunction with the office, provide the new resident orientation, engage in welcome wagon activities, disseminate information to new residents, develop and implement a Membership Plan
2	Volunteer Committee	Secretary	Manage the Volunteer program; implement recruitment and retention programs, develop activities related to volunteer engagement, hold recognition events, coordinate volunteers, maintain and update volunteer list & food handler certificates; develop and implement a Volunteer Plan
3	Communications Committee	At-large	Oversee all aspects of Citizen newspaper and DVRC printed materials for distribution. Manage social media and website, i.e., monitor the development, operation, maintenance and upkeep of all social media and the website to ensure information is accurate and current; work with the webmaster to provide timely information
4	Outreach (Marketing) Committee	Vice-President	Manage the Marketing Plan; conduct all internal and external marketing programs, develops and implements marketing strategies and promotional campaigns to advertise and market the community, ensures the standardization of organizational materials (logo, designs, etc.) on print projects, oversees fundraising events and vendors, proofreads and finalizes print and electronic projects produced by committees and others within the DVRC organization; develop and implement a Marketing Plan
5	Finance and Budget Committee	Treasurer (Chair)	Oversee all budgetary and financial decisions, administer dues increases, track and report financial data, help prepare monthly and annual budgets and financial statements, monitor financial transactions, recommend budget modifications, coordinate the annual audit, review tax documents, develop policies and procedures to ensure effective and efficient accounting, ensure compliance with current methodologies and practices
6	Indoor Programs Committee	At-Large	Oversee and promote community interest in hobby, craft and indoor activities. Solicit suggestions from members for improvement and ideas regarding activities and programs
	Governance Committee	Vice-President	Administer DVRC Articles of Incorporation, bylaws, rules & regulations, policies & procedures, contracts, leases, insurance coverage, board recruitment and nominating committee; solicit input for changes to governance documents and prepare amendments as needed; maintain and update records and manuals, oversee compliance with state, federal and local government rules and regulations, ensure policies and procedures are kept current

7			and are routinely reviewed for accuracy, appropriateness and content; negotiate, review and prepare contracts and leases, monitor contracts and leases for compliance and renewal; negotiate and oversee insurance policies and coverage for the organization
8	Compliance & Neighborhood Watch Committee	Maintenance	Investigate and respond to complaints filed by residents, oversees Neighborhood Watch program. Involve appropriate governmental agencies as needed, work with all parties to resolve disputes and complaints; hold neighborhood watch meetings and implement necessary features of the neighborhood watch program, actively promote the intent and need for the compliance committee and the neighborhood watch program
9	Development Committee	President	Act as liaison between the Board and office to carry out necessary administrative duties pertaining to strategic plan development and implementation and related goals and objectives to achieve DVRC mission; develop short, medium and long-range plans for projects, programs and activities; review and update plans as needed to ensure plans meet current and future requirements and objectives of the community, ensure information is disseminated to appropriate parties and members, conduct surveys, data gathering and analysis, as required; provide administrative assistance to the Board
10	Entertainment Committee	Secretary	Provide entertainment at Farnsworth Hall and oversee hall rentals; plan, produce and oversee all performances and shows; works in conjunction with Special Programs & Kitchen Committee
11	Personnel & Compensation Committee	At-Large	Monitor employee-employer relations, coordinate hiring activities, prepare requests for salary/benefit changes, develop and implement a wage/salary scale, develop job descriptions and recommend changes; develop and implement a Succession Plan to continually assess personnel needs and turnover risk, develop and implement personnel policies and procedures, ensure annual performance reviews are conducted, participate in grievance & disciplinary hearings, confirm compensation best practices are being adhered to, continually assess employee benefits, individual needs and training opportunities; oversee internship program; ensure the Employee Manual is reviewed by employees and its content is kept current
12	Special Programs & Kitchen Committee	At-Large	Special programs may include such events as fundraising dinners, potlucks, craft shows, special celebrations, member parties, Veterans day, and other events that may or may not raise money; oversee kitchens at Farnsworth and Read Halls to ensure compliance with Maricopa County and state policies and regulations, as well as oversee purchasing and inventory of material goods and manage outside rentals of DVRC properties

13	Outdoor Programs Committee	Maintenance	Oversee memory brick garden, nature trail, common areas, outside activity areas; promote interest in outdoor activities; encourage new ideas related to sports and leisure activities and improvements to grounds and facilities
14	Executive Committee	Treasurer	The executive committee shall be comprised of approximately 3 to 4 Board members and the office manager to facilitate and expedite discussions between regularly scheduled board meetings, especially during the summer months when no meetings are held. The committee can meet as needed, or on a regular basis. The smaller size of this committee allows for quicker action and more timely discussion on topics of importance or immediate urgency such as finances, committee requests, emergency situations, planning needs, etc. Discussions by the executive committee would go to the full board for final discussion and decision-making

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DVRC Strategic Plan 2021 - 2026



Dreamland Villa 2015 - 2019 Cash Flow Report - Page 1

The amounts included in this report for the Annual Fees and Total Gross Income for 2015 have been adjusted in order to accurately reflect the cash income from that year. The amounts reported on the financial statements for 2015 were due to incorrect internal procedures that were followed. Revenue for annual fees received in December, 2014 was incorrectly recorded as income in the year that it was received (2014) as opposed to the following year (2015) as per long standing DVRC policy. This produced distorted data for that year and has been corrected for the purposes of this report. A more full explanation of these events is available in the April 2015 Edition of The Citizen - page 4.

2018 income includes \$62,031 donated by the Reda Duehr estate.

2016 Income includes \$20,000 down payment from Crown Castle for purchase of lease for cell phone tower.

2019 Expenses includes \$11,000 in lost Entertainment/Rental/Facility Lease income that was later reimbursed by insurance in 2020 "Fire and Security" are one line item in the budget. The amounts have been broken down to separate categories for this report.

	2019	2018	2017	2016	2015
GROSS INCOME					
Annual Fees	\$304,329	\$342,911	\$316,764	\$333,636	\$364,809
Initial Membership Fee	\$37,676	\$40,000	\$53,200	\$25,720	\$12,400
Commissions & Fees	\$10,185	\$11,629	\$13,219	\$11,595	\$5,559
All Donation Income	\$10,093	\$75,256	\$22,041	\$22,598	\$14,544
Event/Rental/Lease/Fundraising Income	\$54,221	\$62,264	\$66,553	\$50,938	\$45,328
Sprint Tower Income	\$14,400	\$14,400	\$14,400	\$31,163	\$10,368
Other Income	\$5,782	\$9,307	\$17,592	\$17,669	\$7,333
Total Gross Income	\$436,646	\$555,767	\$503,769	\$493,319	\$460,341
OPERATING EXPENSES					
Legal Fees	\$5,763	\$3,422	\$6,186	\$4,641	\$20,351
General Insurance	\$27,181	\$27,180	\$27,040	\$26,673	\$27,561
Fire Protection & Systems	\$9,351	\$7,454	\$6,036	\$7,364	\$3,364
Employee/Contractors	\$168,078	\$147,122	\$153,360	\$133,962	\$131,195
Maintenance & Pools	\$44,012	\$48,331	\$43,707	\$63,414	\$56,172
Utilities	\$88,790	\$96,836	\$102,597	\$95,202	\$98,109
Event/Rental Expense	\$21,031	\$19,241	\$32,100	\$17,561	\$16,473
Income Tax	\$0	\$0	\$0	\$0	\$0
Depreciation	\$0	\$0	\$0	\$0	\$7,932
Other	\$51,408	\$40,246	\$48,043	\$68,498	\$34,857
Total Operating Expenses	\$415,614	\$389,832	\$419,069	\$417,315	\$396,014
TOTAL EXPENSES					
Cash Operating Expenses	\$415,614	\$389,832	\$419,069	\$417,315	\$388,082
Money Market CASH Expenses	\$27,480	\$50,994	\$57,541	\$81,272	\$50,054
Total CASH Expenses	\$443,094	\$440,826	\$476,610	\$498,587	\$438,136
Net CASH Income or (Loss)	(\$6,448)	\$114,941	\$27,159	(\$5,268)	\$22,205

Dreamland Villa 2015 - 2019 Cash Flow Report - Page 2

	2019	2018	2017	2016	2015
ALL DONATION INCOME					
Donation Income	\$2,511	\$64,151	\$5,228	\$9,736	\$14,544
55+ Fee Donation Income	\$7,582	\$11,105	\$16,813	\$12,862	
Total All Donation Income	\$10,093	\$75,256	\$22,041	\$22,598	\$14,544
EVENT/RENTAL INCOME					
Facility Lease Income	\$10,430	\$16,926	\$18,384	\$15,141	\$13,855
Rental Income	\$12,580	\$18,057	\$7,186	\$4,425	\$7,700
Subtotal Lease/Rental	\$23,010	\$34,983	\$25,570	\$19,566	\$21,555
Entertainment Income	\$23,866	\$20,060	\$25,743	\$24,325	\$16,496
Kitchen Income	\$2,594	\$3,212	\$4,812	\$3,345	\$4,623
Fundraiser Income	\$4,751	\$4,009	\$10,428	\$3,701	\$2,654
Total Event/Rental/Lease Income	\$54,221	\$62,264	\$66,553	\$50,938	\$45,328
LEGAL EXPENSES					
Legal Expense	\$5,763	\$3,422	\$1,953	\$2,297	\$20,351
Legal paid from 55+ Fund	\$0	\$0	\$4,233	\$2,344	\$0
Total Legal Expenses	\$5,763	\$3,422	\$6,186	\$4,641	\$20,351
EMPLOYEE/CONTRACTORS EXPENSE					
Workmans Comp Insurance	\$1,212	\$1,665	\$1,760	\$1,365	\$1,307
Salaries & Wages	\$143,675	\$122,121	\$129,610	\$112,631	\$114,297
Payroll Taxes	\$14,065	\$14,332	\$13,244	\$11,579	\$9,788
Payroll Processing	\$2,833	\$2,536	\$2,746	\$2,465	\$2,202
Employee Benefits	\$2,143	\$469			
Security (Indep. Contractor)	\$4,150	\$6,000	\$6,000	\$5,922	\$3,600
Total Employee/Contract	\$168,078	\$147,122	\$153,360	\$133,962	\$131,195
MAINTENANCE & POOLS -"Permits" as a budget line item ceased to be used in 2017. Pool permit costs are included in Pool Maint & Supplies from 2017 on.					
Pool Permits			\$1,260	\$1,260	
Pool Cleaning Service	\$15,400	\$16,700	\$17,654	\$20,671	\$0
Pool Maint & Supplies	\$12,640	\$12,957	\$5,396	\$13,910	\$31,258
Subtotal Pools (maintenance & cleaning)	\$28,040	\$29,657	\$23,051	\$35,841	\$32,518
General Maintenance	\$15,972	\$18,674	\$20,656	\$27,573	\$23,654
Total Maint. and Pools	\$44,012	\$48,331	\$43,707	\$63,414	\$56,172
UTILITIES EXPENSE					
Trash Collection	\$2,435	\$5,705	\$10,469	\$8,903	\$7,883
Telephone and Internet	\$5,889	\$5,303	\$5,053	\$4,034	\$3,830
Natural Gas	\$34,876	\$36,475	\$34,985	\$36,306	\$43,852
Electric	\$27,283	\$28,426	\$31,575	\$30,312	\$27,618
Water and Sewer	\$18,307	\$20,928	\$20,515	\$15,648	\$14,927
Total Utilities	\$88,790	\$96,836	\$102,597	\$95,202	\$98,109
EVENT/RENTAL EXPENSE -"Permits" as a budget line item ceased to be used in 2017. Pool permit costs are included in Rental Expense from 2017 on.					
Entertainment Expense	\$11,583	\$9,752	\$12,860	\$13,100	\$8,881
Rental Expense	\$4,246	\$4,669	\$8,688	\$100	
Kitchen Expense	\$2,590	\$3,212	\$2,597	\$3,345	\$4,623
Fundraiser Expense	\$2,612	\$1,608	\$7,955	\$701	\$2,654
Farnsworth Building Permit				\$315	\$315
Total Event/Rental Expense	\$21,031	\$19,241	\$32,100	\$17,561	\$16,473