

## **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

<b>Proposed Strategy</b>	<b>Assumptions, facts, and values that support this proposed strategy</b>	<b>What possible obstacles do we face in implementing this strategy?</b>	<b>How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities</b>
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

<b>Proposed Strategy</b>	<b>Assumptions, facts, and values that support this proposed strategy</b>	<b>What possible obstacles do we face in implementing this strategy?</b>	<b>How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities</b>
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

<b>Proposed Strategy</b>	<b>Assumptions, facts, and values that support this proposed strategy</b>	<b>What possible obstacles do we face in implementing this strategy?</b>	<b>How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities</b>
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)

<b>Proposed Strategy</b>	<b>Assumptions, facts, and values that support this proposed strategy</b>	<b>What possible obstacles do we face in implementing this strategy?</b>	<b>How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities</b>
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

<b>Proposed Strategy</b>	<b>Assumptions, facts, and values that support this proposed strategy</b>	<b>What possible obstacles do we face in implementing this strategy?</b>	<b>How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities</b>
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

<b>Proposed Strategy</b>	<b>Assumptions, facts, and values that support this proposed strategy</b>	<b>What possible obstacles do we face in implementing this strategy?</b>	<b>How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities</b>
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

<b>Proposed Strategy</b>	<b>Assumptions, facts, and values that support this proposed strategy</b>	<b>What possible obstacles do we face in implementing this strategy?</b>	<b>How to respond to the obstacles; strategies for overcoming obstacles and setting short-term priorities</b>
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