

Elevate Your Community by Creating Excellence in Your Association

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Steps to create a strategic plan for your association: *(adapted from Forbes magazine article)*

1. Determine where you are
 - a. Create an executive summary including:
 - i. Policies, rules, amendments, and resolutions in place
 - ii. Collections Policy, reserve studies, a/p process, “state of the union” so to speak
 - iii. Market analysis
 - iv. Competitor analysis
2. Identify what is important
 - a. Where do you want to be?
 - b. What do you want the association to look like?
 - c. SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)
3. Define what you must achieve
 - a. Mission Statement
 - b. Key strategic goals:
 - i. Are there rules, resolution, policies that need to be implemented in order to achieve your goal?
4. Determine who is accountable
 - a. Board of Directors responsibilities
 - b. Create Committees or Commissions for goals
5. Communicate
 - a. Between the board and community: newsletters, open meetings, ease of violation reporting, website, social media, etc.
 - b. Create a schedule to review progress of goals set on a monthly or quarterly basis.

Consider the following when creating your plan:

ATTRACT	MAINTAIN	NON VISUAL	COMMUNICATION
Appearance/Curb appeal	paint	reserve study	marketing (newsletters/websites)
landscape	lighting (safety)	crime	signage
snow removal	parking lots	schools	social media
modernization	trash (dumpster overflow)	delinquency rate	supprot realtors (brochures)
Cleanliness		money management	enlisting volunteers:
pet friendly		% of renters	- Committies (marketing)
smoke free		FHA Approval	- Commissions
social events		pending lawsuits	sell the neighborhood
shared community space		corporation status	sell the lifestyle
charities		professional services	convenience
			public transportation