



# LIFE MORE THAN IMAGINED: 2020-2023 SKYESTONE COMMUNITY ASSOCIATION STRATEGIC PLAN

December 10, 2019



### Background:

The 2020-2023 Skyestone Community Association strategic plan was developed through a multi-tiered planning process that involved the HOA Board members, HOA committee chairs and members, HOA staff, and residents. Beginning in July, 2019, the planning committee composed of the HOA resident board members, committee chairs and staff explored the internal and external environment under which the Community is operating and developed the first draft of the Community's vision, values and mission. In September a day-long planning session was held, where 35 residents came together to review the vision, values and mission as well as discuss what actions would be needed to implement the HOA's mission. The outcome of that session was a list of themes with associated actions in priority order that would move the Mission forward. The next step for the planning committee was the development of draft goals, objectives and specific actions. This phase was completed in October. A town hall meeting was held to gain further community input into the plan prior to review and approval by the Board.

The Strategic Plan is designed to provide the Board, Committee Chairs and members, HOA staff and the residents guidance and direction over the next several years. As actions are completed and goals are met, new actions can be added, and new goals can be developed.

Members of the Planning Committee include Ken Atwell, HOA Board President; Gary Mahan, HOA Board Vice-President; Laura Archer, Board Treasurer; LeeAnne Wrenn, Design Committee Chair; Peter Kepler, RAC Chair; Mike Jacobson, Finance Committee Chair; Kathryn Dodson, Welcome Committee Member; and Steve Parker, Landscape Member. The planning process was facilitated by Liz Bishoff, a Skyestone resident, and supported by Denise Bogue, Skyestone Community Manager and Angela Harris, Lifestyle Director.

### Introduction:

The Skyestone Community Association is entering an exciting period. After five years of building, the final homes are being completed and the residents are now able to assume responsibility for our Community. While we have a formal transition process from declarant management to homeowner management, there are many other ways that the community is in transition. This Plan reflects many aspects of this transition, including the need to develop community values and vision; make the governance structure operational; and establish how we will work as a community.

In addition to working within our community, the Board, HOA staff, Committee chairs and members, as well as residents will need to work with external stakeholders including local government entities; other organizations with common interests; vendors and others to achieve our Association's mission, goals and objectives.

One of the key components of effectively working together is having a common vocabulary. The following are several terms that we use in the Plan.

- **Leadership:** The leadership refers to Board members, HOA staff and committee chairs. To achieve many of our goals, members of these three entities will need to work together.
- **Skyestone Community Association:** This is the official name of the HOA. It can also be referred to as the HOA or the Community or the Association.
- **community:** When the term community appears with a lower case 'c' this refers to all members of our HOA.
- **Residents:** Residents refers to everyone who lives in Skyestone, whether they are owners or not. Owners is a term with specific meaning in the CC&R's.
- **Declarant:** The declarant is the developer, Taylor Morrison.

### Values, Vision, and Mission Statements:

#### **Values Statement December 19, 2019**

At Skyestone we strive to embrace these values:

- Be respectful
- Demonstrate trust and integrity
- Be cooperative
- Be welcoming
- Be supportive and caring
- Be inclusive and transparent
- Use open and clear communication

**Vision Statement**  
**December 19, 2019**

**Skyestone—Life more than imagined: A community that embodies diverse values, shares common interests and abundant activities.**

**Mission Statement**  
**December 19, 2019**

The Skyestone Community Association is committed to managing a quality active 55+ community for its residents through effective stewardship of our:

- Finances
- Governance
- Lifestyle
- Natural environment
- Resident engagement
- Resources

**Goals, Objectives and Actions:**

The goals, objectives and actions are designed to advance the Association's mission. The following goals prioritize the areas that the Association will focus on, however they do not reflect all the areas that the Association will be working in. For example, while there is not a specific goal on Lifestyle, there are ongoing efforts on the part of HOA staff and Committees to both engage residents in the active 55+ lifestyle.

**Goal 1: Communication**

**Skyestone will have an open and effective exchange of information within the community.**

Objective: To ensure an informed and engaged community, leadership will develop strategies to attain effective two-way communication.

Example Actions:

- Develop and implement a Communication Plan
- Provide a user-friendly web-based portal

**Goal 2: Transition**

**Develop the HOA's capability to manage the Skyestone Community.**

Objective 1: HOA assumes complete control of Community responsibilities from the declarant.

Objective 2: Gain tools and knowledge to effectively manage the community.

Objective 3: Ensure an informed community through regular, on-going communication

Example Actions:

- Draft and implement the transition plan
- Communication to the community
  - Post or update list of open issues
  - Post List of actions
  - Provide quarterly updates in newsletter

### **Goal 3: Fiscal Management**

**Maintain fiscal viability and effective management of our financial resources.**

Objective 1: Develop the annual budget for operation of the Community.

Objective 2: Ensure the reserve study projects the estimated costs of maintaining our assets.

Objective 3: Ensure financial management complies with the Skyestone Community Association governing documents.

Objective 4: Provide leadership with financial guidance and the community with regular updates of financial condition of the Community.

Example Actions:

- Most of the finance committee actions are regular and ongoing, including regular monitoring of the budget, preparation of the reserve study process, implementation of the reserve study, reporting to the community on financial matters, as well as drafting of financial policies.

### **Goal 4: Governance**

**Establish a clear and concise operating structure to ensure effective governance of the Skyestone Community Association.**

Objective 1: Develop and publish an HOA governance model.

Objective 2: Ensure efficient and effective operation of the HOA committee structure.

Objective 3: Create an effective communication and decision-making process across leadership.

Example Actions:

- The Board will develop the HOA governance model.
- Develop a Board and Committee leadership development program that includes succession planning.
- HOA committees will review their charters to identify opportunities for improvement including inclusion of Villas' representation on each committee.
- Establish an interactive committee forum to address cross-committee initiatives.