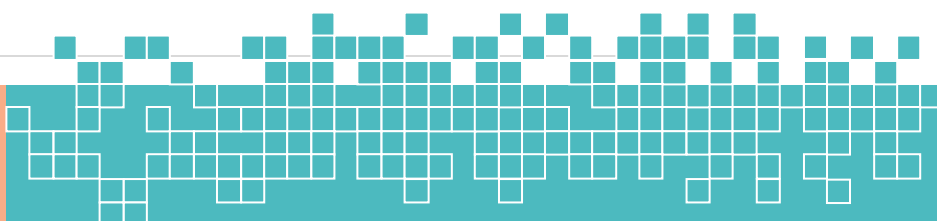


Conashaugh Lakes Community Association, Inc. 2024 - 2029 Strategic Plan



“Members Working Together as a Community, Continuing Our Path Forward”



Overview

The 2024-2029 Conashaugh Lakes Community Association, Inc. Strategic Plan is a collaboratively built roadmap that will serve to drive Board and staff decision making. The vision, mission and goals outlined in this Plan are a result of community feedback and the Board of Directors, Standing Committees and Community Administrator and staff feedback. Though this document will serve as a roadmap for Board and staff decision-making, no decisions will be made on any of the outlined goals without careful study, fiscal analysis, board deliberations and approval. The Board would like to thank all those who contributed ideas and input to make this Plan a reality.

Development and Organization of the Plan

The Conashaugh Lakes Community Association Strategic Plan was developed through a planning process that took place in 2023. The goals of the strategic planning process were to:

- Strengthen member satisfaction.
- Increase property values (enhance safety and security).
- Sharpen effectiveness of community governance (maintain financial stability).
- Improve alignment and unity among all community members.
- Provide continuity for subsequent Boards.
- Protect Natural Resources, wildlife habitat, and the environment.

The strategic planning process included an analysis of the community's strengths, weaknesses, opportunities and threats, benchmarks, and community feedback through a community survey. A wide range of ideas and opinions were brought into the planning process. The Conashaugh Lakes Community Association Board of Directors used the community feedback to help define the strategic focus areas and goals outlined in the Plan. The result is a Strategic Plan that reflects the ideas and opinions of the community and sets Conashaugh Lakes Community Association up for success.

The strategic planning process will also take advantage of any cost savings while maintaining adequate capital improvement funds and reserves to achieve improvements and maintaining all community amenities, structures, and assets which will align to strategic goals.

The Plan is divided into seven strategic focus areas. Within each focus area is a set of short and long-term goals. Each year, the Community Administrator and Board will create a work plan to drive tasks associated with each goal. Annually, the work plan will be updated including specific tasks to accomplish each goal as well as budget requirements.

Acknowledgements

Thank you to the following group who worked diligently to develop the Strategic Plan:

Board of Directors:

Kurt Budveit
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Craig Henry
Barbara Chopyk
Laura Budveit
Betty Buccine
Marisa Jara
Howard Smaller

Administration and Maintenance:

Kimberly Decker
Craig Cuneo

Strategic Planning Committee:

Deborah Henry Jim Buccine
Jerry Colotti Bill King
Vito Lapena

Our Mission

The mission of Conashaugh Lakes Community Association Inc. is to promote the common interests of its members, protect and enhance the Association's reputation and services so that home values remain strong and annual dues assessments remain within reasonable guidelines to maintain financial stability, preserve, and enhance the quality of life of its residents, and to provide for the management, safety, security, maintenance, and care of the community.

Our Vision

We imagine, over the next five years, as a result of our work, the following will be realized:

Conashaugh Lakes Community Association will be able to continually enhance a safe, well-maintained, financially stable community that fosters family, friendship, and community involvement. Offer members enhanced amenities and a robust roster of activities that together builds a more beautiful, unified, and safer community-by ensuring sound, covenant guided decisions by our elected Board and significant resident participation. To promote Conashaugh Lakes Community Association as the most desirable community in Northeastern Pennsylvania to call home or make it your weekend getaway.

Challenges Acknowledged

While the Board is optimistic about achieving the vision over the next three to five years, they are also aware of the inherent challenges to this work. Anticipated challenges the Board has taken into consideration during the development of the Strategic Plan include:

- Funding restraints.
- Homeowner involvement.
- Subsequent Boards materially alter the Strategic Plan as adopted.
- Increasing population as lots are built out.
- Staffing to maintain amenities.
- Concerns within community to change, fee increases and spending.

Strategic Focus Areas

1. Improve Business Management Technology.
2. Improve Safety and Security.
3. Maintain and Improve Infrastructure-Building Structures, Maintenance Equipment, Amenity Facilities, and Roads.
4. Expand Recreational Amenity Offerings.
5. Maintain Financial Stability.
6. Maintain and Improve the Environment.
7. Establish an Emergency Management and Business Continuity/Disaster Recovery Plan.

Introduction

This strategy represents the general methods that the Association will use to meet its mission and vision, in context with topics discussed in this document. The strategy will include how the Association will serve the needs of community members. It will make understandable the value proposition that will distinguish the Association in the eyes of individuals behind the front gates and outside the front gates. The goals set will involve making decisions on allocating operating, capital, and reserve resources and will be designed to maximize the long-term value of the Association.

The strategy formulation includes:

- (1) Aligning the goals to the Association's mission, vision, and core competencies.
- (2) Analyzing the Association's strengths, weaknesses, opportunities and threats.
- (3) Establishing the approach that will enable the Association to succeed.

- (4) Setting long-term objectives, goals, and priorities and a financial projection as well as short-term goals and actions. Strategy implementation involves putting the plan in action in order to accomplish strategic objectives, goals, and priorities to support the long-term value of property and the Conashaugh Lakes Community Association.

Strategic implementation includes:

- (1) Internal communications to community members and employees as well as external communication to other stakeholders (vendor contracts, service providers).
- (2) Assigning duties to meet goals.
- (3) Resource allocation.

Strategy evaluation involves gathering data and monitoring outcomes related to expected results or impacts that emerge because of implementing the strategic plan.

Strategy evaluation includes:

- (1) Establishing budgetary discipline and project performance expectations.
- (2) Creating/applying measurements based on data collection and segmentation against the stated goals and objectives on an aggregate level.
- (3) Identifying, analyzing, and creating relevant corrective actions to be implemented, if required.

Strategic Goals

1. Improve Business Management Technology

Benefits of Business Management Technology are to improve member communications through one member portal source for members access to information, announcements, alerts, bulletins, newsletters, calendar of activities, community documents, dues payments and statements, FAQ answers, office contact, improve security gate access, security monitoring system, traffic violations enforcement, enhance rules and regulations enforcement, reduce paper-based processes, siloed data sources, and separate management systems and drive a streamlined community management process.

Short-Term Goals (1 year or less)

- **Assess and conduct a feasibility study and develop a plan** to implement an HOA Management Software package for Administrative, Security, Maintenance, Communications Management and Financial efficiencies.
 - Upgrade or replacement of Sage Accounting with a new accounting package.
 - Centralized membership database.
 - Centralized Violations Management.
 - Management of Work Orders for Maintenance and Projects.
 - Managing Community Goals.
 - Security Management and Gate Access.
 - Communications Management and Transparency.

- Financial Management and Reporting:
 - Accounting
 - Budget and Forecasting
 - Reserves Management and Scheduling
 - Customized Financial Reporting and Community Information Reporting
- Member Portal for Community Information, Activities, Calendar, Communications – Newsletters, Bulletins, Meeting Minutes, Surveys, Blue Book Documents, and Payments, up-to-date reliable information.
- Centralized Portal for Board of Directors, Standing Committees, Meeting Minutes, Documents.

Long-Term Goals (beyond 1 year)

- Implementation of Digital Platform – paper volume reduction and reduce duplication in HOA Management processes. Drive efficiency and enhance member experience. Operational activities standardization and simplification.
- Assessment and feasibility study to have a Virtual Meetings platform (Zoom or other Virtual Meeting platform) for Board Membership Meetings.

2. Improve Safety and Security

Benefits of Improved Security: Increased safety, better ability to manage violations and enforcement, more visibility of security officers performing security checkpoints in the community, more reliable, efficient, and improved gate access for our members and their guests.

Short-Term Goal (1 year or less)

- Security staffing and patrols. Increase the hours for security officers.
- Enforcement of Security Violations for Traffic and Safety:
 - Enforcement of moving violations for the safety of the membership through Security patrols and speed limit cameras.
 - Adhere to violations enforcement and fines for not following the posted speed limits, not stopping at stop signs, and not driving on the right side of the road.
 - Monitoring any disruptive activity on membership property.
 - Upgrade Security Cameras.

Long-Term Goals (beyond 1 year)

- Assessment and feasibility study to upgrade Security Gate System.

- Improve gate access to eliminate current limiting access features.
- More effective speed controls.

3. **Maintain and Improve Infrastructure - Building Structures, Maintenance Equipment, Amenity Facilities, and Roads**

Benefits of Maintaining Building Structures, Amenity Facilities and Existing Roads Program: Building structures, maintenance equipment, amenity facilities maintenance and improvements and roads will increase the appeal, community appearance of Conashaugh Lakes Community Association, which links, to home values. Maintaining the 28 miles of roads within the Conashaugh Lakes is important for home values and safety. As such, the Board is committed to maintaining the existing roads program as a top priority.

Short-Term Goals (1 year or less)

- Completion of the Trash Compactor Relocation Project
 - Combining trash and recycling into one area, increases the capacity for recycling and meets environmental standards.
 - Combines the trash drop-off, recycling, and mailbox areas for members convenience.
 - Removal of the old recycling dumpsters in the mailbox area and decommission and removal of the compactors adjacent to the pool and maintenance areas.

- Pool Maintenance
 - Assessment and cost estimates for the replacement of the pool skimmers (6 years old), patch repairs were completed for 2023 season.

- Maintenance Vehicles and Equipment
 - Replace 2007 Ford F550 mason dump truck. The benefits of replacement with a new truck outweigh the ongoing major maintenance expenses of the 16-year-old truck that is past its useful life.

- Maintain Existing Roads Program
 - Annual Road Paving and maintenance.
 - Add new grading and paving of parking area in front of the tennis/basketball court including handicap parking following completion of the conduit replacement beneath Conashaugh Lake dam.

- Main Office Building
 - Assessment and cost estimates for roof replacement, flashing around chimney, chimney cover, soffits, gutters and leaders.

- Updated Reserve Study for Buildings/Structures.
 - Conduct a reserve study for buildings and structures condition assessment, remaining useful life and current replacement cost to update the reserve schedule and preventive maintenance planning, upgrades or

replacements. The last full reserve study was conducted in 2003.

Long-Term Goals (beyond 1 year)

- Main Office Building
 - Engineering assessment and estimates for the addition of Handicap Access (ramp or lift).

- Security Building Maintenance
 - Raise counter height.
 - Replace flooring with all-weather flooring.

- Main Entrance Gate Entrance Islands Maintenance
 - Cost estimates for masonry work to repair islands.

- Maintenance Salt Shed
 - Structure Repair – cost estimate for addition of bracing supports.

- Mailbox Area
 - Replacement of Community Notification Signage Board with a wireless Digital Signage Notification Board. Install new signage board at the Member's Entrance. The Communications Committee would like to have an additional notification board at the Member's Entrance.

- Amenity Maintenance
 - Add additional benches and picnic tables in amenity areas.
 - Assessment for repair/replacement of old picnic tables at Seneca Lake and Conashaugh Lake.
 - Add additional picnic tables at the Conashaugh Lake Beach area.
 - Assessment to determine if there is a need for additional barbecues grills at Seneca Lake and Conashaugh Lake.
 - Assessment to increase the storage capacity for boats and kayaks at Conashaugh Lake.
- Maintenance Office
 - Feasibility study for relocation of Maintenance Office and cost assessment including lot perks – water, septic.
 - Cost assessment for a new Maintenance office with restroom.
- Recreation Building
 - Assessment and cost estimate for renovation/repairs of pool area restrooms.
 - Addition of guardrail at pool area entrance.
- Main Office Building
 - Evaluation and design assessment for Improvements to Lots 901 and 901-R (Main Office Parking Lot, Bus Stop, Security Building, Main Office, Mailbox Area, Compactor Area
 - Conduct a Traffic Study
 - Main Office Building

- Assessment and cost estimate for siding replacement.
- Expansion to add two offices, a meeting area, restroom and add storage space in the existing building considering the current office capacity and future needs.
- Eliminate off-site storage facility.
- Handicap and office staff parking.
- Bus Shelter at the bus stop.
- Paving main office parking area.
- Addition of Amazon Hub Lockers for mailbox area.
- Landscaping Improvements at the Main Entrance area.

Development of a project plan and financial assessment and forecast to fund various phases of improvements.

4. Expand Recreational Amenity Offerings

Benefits of Expanding Amenities and Offerings

Immediate and long-term improvements and expansion of Conashaugh Lakes Community Association's amenities and offerings will provide opportunities to reach and connect a wider range of community members. Additionally, amenity improvements will increase the appeal of Conashaugh Lakes Community Association, which links it to home values.

Short-Term Goals (1 year or less)

- Offer activities that make use of the baseball field and other recreation areas (outdoor activities - recreational teams - baseball teams, kickball teams, bocce teams, volleyball teams, archery). Need team leaders to drive the activities – check for membership interest and ask for sign-up)
- Assessment of current and additional activities that make use of the Recreation Center
 - Art classes (painting, photography, etc.)
 - Educational classes (CPR training, Wildlife, environmental, etc.)
 - Social Activities (book discussions, gardening discussions, etc.)

Long-Term Goals (beyond 1 year)

- Assessment and feasibility study for the addition of Walking Trails and the creation of a trail system.
 - Identify and work with a contractor to develop a Trails Master Plan.
 - Add trail signs and create a map to include access and distances.
 - Incorporate the benefits of a Trails Master Plan into CLCA brand and marketing.
- Continue to grow and implement plans to improve amenities and offerings based on financial feasibility and membership input.

5. Maintain Financial Stability

Benefits of financial stability

Keeping dues and annual budget within reasonable guidelines with incremental increases in dues and reserves to keep up with inflation and updated reserve study (to avoid any special assessments) will continue to make Conashaugh Lakes Community Association a desirable community and maintain property values.

Short-Term Goals (1 year or less)

- Establish a long-term financial plan for the association's assets that is reviewed and revised annually.
- Develop written, board-approved investment policies and procedures.
- Prepare a long-term operating budget forecast covering the next three to five years.
- Refine budget annually adjusting projections and for capital improvements and evaluation of cost-savings.
- Evaluate and determine cost-savings initiatives.

Long-Term Goals (beyond 1 year)

- Commission a reserve study at least every three to five years and review the report annually.
 - Include reasonable reserves for future major repairs and replacement of common facilities in assessments as determined by the association's most recent reserve study.
 - Implement a cost-savings review process.

6. Maintain and Improve the Environment

Benefits of maintain the Environment

Woodlands, air quality, lakes, wildlife for the enjoyment of the membership.

Short-Term Goals (1 year or less)

- Maintain lake stocking program.
- Replacement of the conduit beneath the Dam at Conashaugh Lake to maintain DEP Dam compliance.
- Water testing.
- Address any other environmental issues.

Long-Term Goals (beyond 1 year)

- Assessment of Conashaugh Lake beach area for improvements.
- Assess and determine any future environmental needs.

7. **Establish a Disaster Recovery and Emergency Management Plan**

Benefits of establishing a Disaster Recovery and Emergency Management Plan:

Improved safety of Conashaugh Lakes Community Association members, being prepared with an action plan in the event of an emergency or disaster.

Short-Term Goals (1 year or less)

- Create a Disaster Recovery and Emergency Management Plan.
 - Compile, adopt, and incorporate a disaster recovery and emergency management plan into the association's continuity of operations plan.
 - The disaster plan will identify basic community functions and procedures, key responsibilities, and priority tasks that enable the community to function after a natural disaster.
 - Planning
 - Preparing
 - Initial Response and Recovery
 - Rebuilding and Resilience
 - Review Best Practices – Natural Disasters published by Foundation for Community Association Research.
 - Conduct a Planning Assessment
 - Who will be affected and who will respond?

- What disasters are likely to happen here? Winter storm and ice? Wildfire? Tornado? Hurricane? Other Disaster?
- Where do we go during and after the disaster?
- When should we notify residents and staff?
- Why have we prioritized key response tasks?
- Disaster Planning Considerations
 - Leadership Team Assignments
 - Authority – provide clear authority for the policy decisions and association actions to ensure rapid and effective response.
 - Facility Operations
 - Communication
 - Records Management
 - Human Resources
 - Health and Safety
 - Community Services
 - Training
 - Professional Resources

Long-Term Goals (beyond 1 year)

- Develop written policies and procedures.
- Implement Disaster Recovery Plan.