LAGUNA WOODS VILLAGE
SIX-MONTH STRATEGIC OBJECTIVES
November 20, 2019 – May 1, 2020

THREE-YEAR GOAL: ***Ensure financial stability and longevity***						
WHEN	**WHO**	**WHAT**	**STATUS**			**COMMENTS**
			DONE	ON TARGET	REVISED	
1. By February 15, 2020	Jeff Parker and Betty Parker	Develop a new Budget Calendar process to speed up and create efficiencies and reduce the workload for boards and staff, and present to the boards for approval.				
2. By April 15, 2020	Betty Parker and Dan Yost, working with the Board Treasurers	Create a new insurance strategy for the Village to incorporate into the 2022 Business Plan/Budget.				
3. By May 1, 2020	Jeff Parker (lead) and Betty Parker, with input from the Boards, Community Activities Committee and Finance Committee	Review the shared cost policy and present revision recommendations to the boards.				
4. By May 1, 2020	Jeff Parker and Siobhan Foster, working with the Maintenance Department Head	Perform an operational review of maintenance to identify and implement changes in order to improve efficiency and operating costs.				
5. By May 1, 2020	Jeff Parker and Siobhan Foster, working with staff and/or a consultant	Identify revenue opportunities and present recommendations to the boards for approval and implementation.				

THREE-YEAR GOAL: ***Improve customer service to meet residents' needs and concerns***						
WHEN	**WHO**	**WHAT**	**STATUS**			**COMMENTS**
			DONE	ON TARGET	REVISED	
1. By March 1, 2020	Chuck Holland and the Resident Services Manager	Include the Sales and Leasing Community Services Program in the IVR System.				
2. By May 1, 2020	Siobhan Foster (lead), Resident Services Manager, Chuck Holland and Eileen Paulin	Define and implement the customer service experience.				
3. By May 1, 2020	Eileen Paulin (lead), Chuck Holland, Brian Gruner, Andre Torng, Dan Kenny and Steve Parsons, plus one member each from Third Board, United Board and VMS and two GRF Board members	Establish agreed-upon measurements, reporting systems and customer service goals and report the results to all boards.				

THREE-YEAR GOAL: ***Attract, develop and retain high quality staff***						
WHEN	**WHO**	**WHAT**	**STATUS**			**COMMENTS**
			DONE	ON TARGET	REVISED	
1. By February 1, 2020	Carrie Weldon (lead), working with Brian Gruner and Dorothy Pacella	Evaluate use of Golden Rain Foundation (GRF) amenities as an employee benefit and develop options and present to the Village Boards for direction.				
2. By March 1, 2020	Carrie Weldon, working with Annie McCay	Explore the feasibility of allowing residents to be hired by VMS for part-time and full-time employment and share options with all boards.				
3. By March 1, 2020	Siobhan Foster, working with Annie McCay, Dorothy Pacella and Bunny Carpenter	Review the Board-Staff Interaction Policy, develop a process for strengthening the board/staff relationship and present the process to all boards for consideration, approval and distribution to all board members and staff.				

THREE-YEAR GOAL: ***Implement technology advances***						
WHEN	**WHO**	**WHAT**	**STATUS**			**COMMENTS**
			DONE	ON TARGET	REVISED	
1. By April 1, 2020	Chuck Holland	Roll out Field Mobile Tablets to Moisture Intrusion and Permits Inspection Teams, with more Work Centers as practical.				
2. By May 1, 2020	Chuck Holland	Convert to all HD cable operation hardware, support, licensing, complexity energy for cost reduction.				
3. By May 1, 2020	Ernesto Munoz	Roll out gate access technology to Gate 11.				
4. By May 1, 2020	Chuck Holland	Implement at least one training objective for resident technology training through PC and Mac Club and Resident Volunteers.				
5. By May 1, 2020	Chuck Holland and Tim Moy	Implement security dispatch system to automate workflow process (i.e., paperless system).				
6. By May 1, 2020	Chuck Holland, working with the Technology Research Group	Review and present the Three Year Technology Plan to the residents and staff.				

THREE-YEAR GOAL: ***Upgrade our infrastructure***						
WHEN	**WHO**	**WHAT**	**STATUS**			**COMMENTS**
			DONE	ON TARGET	REVISED	
1. By May 1, 2020	Ernesto Munoz, with input from the boards	Develop a draft consolidated, affordable infrastructure improvement strategy, as part of a 5-Year Plan by September 2020, and present to all the boards for direction.				
2. By May 1, 2020	Ernesto Munoz	For the 2021 budget, develop an Infrastructure Improvement Plan to address drainage needs in the Mutuals, create a budget to obtain the improvements and address the causes of drainage problems.				
FUTURE: By November 15, 2020	Ernesto Munoz, working with the TEC consultant	Complete an Energy Infrastructure Audit and present data to all boards.				