LAGUNA WOODS VILLAGE

STRATEGIC PLANNING RETREAT

November 20, 2019 * Clubhouse 2

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MISSION STATEMENT

Our mission is to ensure that Laguna Woods Village residents receive unparalleled opportunities to enjoy the utmost in active living.

FIVE-YEAR VISION STATEMENT

Laguna Woods Village will be the premier private community in the West for active 55+ adults.

THREE-YEAR GOALS

(2019-2022 * Not in priority order)

Ensure financial stability and longevity

Improve customer service to meet residents' needs and concerns

Attract, develop and retain high quality staff

Implement technology advances

Upgrade our infrastructure

S.W.O.T. ANALYSIS

Strengths – **W**eaknesses - **O**pportunities - **T**hreats

WHAT ARE THE STRENGTHS AND THE ACCOMPLISHMENTS OF LAGUNA WOODS VILLAGE AND VILLAGE MANAGEMENT SERVICES SINCE THE MAY 2019 STRATEGIC PLANNING RETREAT?

Brainstormed Perceptions:

- We hired a Reserve Specialist to measure the strength of reserves
- We are retaining senior staff
- Infrastructure and security improvements with the access control measures
- Working toward improving our customer service
- VMS improved their services to our residents
- Have a new bus schedule that will improve transportation
- Have a new employee event—a summer picnic
- Broadband infrastructure improvements
- Investment, Revenue Generation and Cost Sharing Task Forces have been developed
- Cross-trained Customer Service Reps to handle multiple functions given increasing service levels
- Continued standardizing of the architectural standards—increased efficiency and reduced burden on everyone
- Alterations has their own area for individualized customer service
- Included funding in the 2020 Business Plan for wage adjustments
- Improved technology in security vehicles
- Kiosk check-in system is providing improved services to the residents
- Developed and published KPIs for each of the departments
- Plan-a-Ride system has been evaluated by a study and revamped to better serve residents' needs
- We increased the match for 401K benefit for the employees
- Received approval to secure Gate 11
- Interaction among the Boards (e.g., a meeting once a month where the President and Vice President get together to discuss opportunities and problems)
- As soon as staff realizes an issue needs to be addressed, they jump right on it and get it resolved
- We reengineered the process for resale packages and reduced the time
- We track every customer service request—it is tracked by the resident until it is resolved
- We completed construction documents for the upgrade of our Performing Arts Center
- New street sign signage
- New cul-de-sac signs for Third Mutual—working on building number signs
- Village helped stall the I-5/El Toro Interchange Project
- Implemented a $3.5 million waste line upgrade in the community
- Purchased a new high efficiency tub grinder
- Reduction of programming costs
- Expanded greatly our means of communicating with our residents
- Community inclusion—reaching out and getting them more engaged
- Recreation activities continue to elevate and attract more people with their offerings
- We sponsored SB 755 for election acclimation resulting in potential major cost savings
- Greater employee accountability
- Worked through a backlog of legal cases
- Greatly increased our closure rate on work order tickets
- On track for evening janitorial services

- Issued a RFP for tree trimming services
- Improvement of the search function on the website
- Added the automated calls for lease expirations and resale notification
- Two big landscape projects in Third—Slope Project and Landscape Maintenance Project
- More and more cooperation
- We have been successful attracting, developing and retaining staff
- 9-80 work schedule
- Social Services Department has increased their resources without increasing costs to residents
- Landscaping has been tweaked and improved despite staffing challenges
- Much better understanding of what topics are residents are interested in
- Improved performance from the paving crews
- We've greatly improved the tracking of customer service and increased awareness throughout the organization
- Completed a large number of infrastructure items (e.g., heating and ventilating, upgraded lawn bowling and bocce)
- Energy savings
- We have been very successful implementing approximately $59 million of improvements for the community
- Acquired street lighting infrastructure for Third Mutual
- Eliminated obsolete broadband infrastructure
- Infrastructure safety improvements
- We're in the process of developing research groups to address specific issues
- We've moved our money to a new investment manager
- Potential consolidation of marketing with a new funding source
- Highly effective Social Services Department
- Great solution to the problem of Round Up
- Successful disaster preparedness drill
- Improved Interactive Voice Response (IVR) reports for transportation to enhance services
- Beginning to see KPIs for the past year
- HR Department has done an outstanding job of recruiting high quality staff
- Implemented new EV charging stations at the Community Center
- Completed the pickleball courts for the community
- Our Emergency Preparedness Program

WHAT ARE THE EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A POSITIVE IMPACT ON LAGUNA WOODS VILLAGE AND VILLAGE MANAGEMENT SERVICES IN THE COMING YEAR?

Brainstormed Perceptions:

- We have an aging society
- Mortgage rates continue to be low
- Retail prices outside are rising
- Boomers are coming in
- Electric vehicles
- Developers are planning to improve our local mall
- Available outside entertainment
- CalTrans improving the I-5 interchange
- Strong stock market
- Government still funding social security and Medicare
- Positive legislation from Sacramento
- HOAs/CIDs becoming more and more common
- Great health care facilities around the area
- Our location (e.g., close to the beach)
- Our weather
- Our emergency program ahs been adopted by other communities
- Local mall available
- Transportation availability
- Financial incentives (e.g., rebates)
- Funding opportunities
- Grants
- Strong local nonprofits
- Laguna Woods Foundation
- City of Laguna Woods
- Senior Center nearby
- Good Police Department, Fire Department and First Responders
- Saddleback College free programs for seniors
- Real estate agents
- Worldwide notoriety of our community
- Laguna Woods is listed at the fourth safest city in the state

WHAT ARE THE EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A NEGATIVE IMPACT ON LAGUNA WOODS VILLAGE AND VILLAGE MANAGEMENT SERVICES IN THE COMING YEAR?

Brainstormed Perceptions:

- Problems with millions of dollars of deferred maintenance and staffing because of the previous management organization
- Mall development
- Legislative constraints
- Housing development
- Hotel development
- Overdevelopment generally
- Technology changes

- Tariffs
- Global warming
- Climate change
- Growth of homeless population
- Partisan politics
- Traffic noise
- Lack of coordination between and among local governments
- Water shortages
- High energy costs
- Fire
- High cost of living
- Insurance market
- Very limited labor pool
- Earthquakes
- Border wars
- Possible recession
- Cost of City permits
- Local government constraints
- Electric companies outages/shutting off power
- Aging electrical grid
- Reduction of social security and Medicare
- Cultural demographics
- Election year
- AirBnBs
- Inflation
- Wars
- Pollution
- High health care costs
- Elder abuse
- Wage increases
- Predatory roommates
- Cyber threats
- Social media
- Rumor mill
- Return of bad diseases
- Contractor scamming
- Senior scamming
- Drug shortages
- Elder abuse
- Crime
- Internet and phone scams
- Drug addictions
- Increased number of people retiring abroad
- Competition from other communities and newer developments

NEXT STEPS/FOLLOW-UP PROCESS

WHEN	WHO	WHAT
November 21, 2019	Siobhan	Distribute the retreat record to those unable to attend or who had to leave early.
Within 48 hours of receipt	All	Read the retreat record.
November 22, 2019	Eileen	Post the "Strengths" on the website.
November 25, 2019	Jeff and Siobhan	Share and discuss the Strategic Plan face-to-face with staff.
November 25, 2019	Executive Team (Jeff-lead)	Review the "Weaknesses" list for possible action items.
By December 17, 2109	Board Executive Teams (Jeff and Siobhan-co-leads)	Present the Strategic Plan to the Boards.
Monthly	Executive Team (Jeff and Siobhan-co-leads)	Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.
Monthly	Siobhan	Prepare and distribute the updated Strategic Plan Monitoring Grid to the Boards.
TBD	Strategic Planning Group	Strategic Planning Retreat for a more thorough assessment of progress on the goals and objectives. Develop objectives for the next six months.

STRATEGIC PLANNING ELEMENTS

"SWOT" ANALYSIS

Assess the organization's:

- Internal **S**trengths - Internal **W**eaknesses
- External **O**pportunities - External **T**hreats

MISSION/PURPOSE STATEMENT

States WHY the organization exists and WHOM it serves

VISION STATEMENT

A vivid, descriptive image of the future—what the organization will BECOME

CORE VALUES

What the organization values, recognizes and rewards—strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency and repetition

THREE YEAR GOALS

WHAT the organization needs to accomplish (consistent with the Mission and moving the organization towards its Vision) – usually limited to 4 or 5 key areas

THREE YEAR KEY PERFORMANCE MEASURES

WHAT success will look like when the goal is achieved

SIX MONTH STRATEGIC OBJECTIVES

HOW the Goals will be addressed: By when, who is accountable to do what for each of the Goals

FOLLOW-UP PROCESS

Regular, timely monitoring of progress on the goals and objectives; includes setting new objectives every six months