

# Woodside Plantation Strategic Plan 2010-2014

The Board of Directors uses this document as its principal tool in determining the overall strategic direction for the growth and maintenance of our Plantation. This plan enables us to anticipate as closely as possible future expenditures for infrastructure and capital items and assists us in strategic financial planning.

The Strategic Plan is a “living” document. Several times during the year, the board measures its progress against this Plan and, at the conclusion of each year, each director reviews his or her portion of the Plan to assure that what we are doing is consistent with current conditions. During this in-depth year-end review, the directors recommend and the board approves strategies and expenditures for the next five-year period.

The complete plan is available for review by any homeowner at the WPPOA office. Comments and suggestions are welcomed.

## Planning – A Historical Perspective

In 1998 the Board of Directors of the Woodside Plantation Property Owners' Association (WPPOA) prepared its first strategic plan. Major elements included review and modification of the Covenants, the establishment of a property owners' Architectural Review Board (ARB), and a set of guidelines for acceptance of new areas from the developer. A project was initiated in 2009 to update the plan and a volunteer group was established. This team interviewed directors and other concerned persons, compared Woodside to similar homeowners' associations, and prepared this document for board review.

## Strategic Plan

The Strategic Plan serves as a primary guide for the Board and all Department Heads in providing directions and setting priorities for the association. It also serves the Board as a guide in the annual budgeting process.

### Board Guidelines for Prioritizing Actions Proposed in the Plan

- The POA will operate within a balanced annual budget.
- Maintenance of all WPPOA facilities and infrastructure will normally take precedence over the construction of new facilities.
- All actions will be in accordance with the Covenants and the Development Agreement.

## Key Themes Emerging from the 2010-2014 Strategic Plan

- We should continue to improve communication between the Board/Staff and Association Members.
- We should continue the use of volunteers to assist in managing the association.
- We should strive to improve our competitive edge in the housing market through our own efforts as well as continuing to work with the Development Company.

## Major Capital Projects

The current level of WPPOA assessment does not include funds for future capital investments. These projects will need to be forecast and funded separately.

## General Assumptions

- Woodside Plantation residents will continue to desire living in pleasant surroundings in a friendly atmosphere.
- Woodside Plantation residents' safety and security will continue to be our community's top priority along with preserving property values.
- Our population will continue to grow and diversify, requiring the expansion and adaptation of new and existing services.
- As we approach "build out", income will stabilize and expenses increase, requiring constant monitoring and probable assessment increases and/or service reductions.
- Aging infrastructure assets will require repair and/or replacement.

## Organizational Goals

For the WPPOA Board of Directors and Manager:

Keep informed and involved in any Town, County, or State activities, ordinances, or laws that would have an impact on Woodside Plantation.

For the WPPOA Board of Directors:

Adhere to responsible management principles and sound fiscal policies to protect our quality of life and enhance property values.

For the ARB, Covenants, and other departments:

Conserve, protect, and enhance our Plantation's extraordinary natural flora and fauna, beauty, and serenity.

## **Administration Strategic Plan**

### Goal

Provide quality administrative support to the Board of Directors, Committees, and residents by maintaining a safe work environment, training Staff, staying abreast of technological changes, adhering to government guidelines, and responding to residents' requests.

1. Staffing - Provide a stable, competent staff in a changing labor force to satisfy the needs of a growing Plantation population.
  - 1.1. Attract/retain quality employees through an improved benefit program.
  - 1.2. Conduct study, develop plan and initiate 1<sup>st</sup> phase by September, 2010.
  - 1.3. Initiate remainder of plan by January, 2011.
  - 1.4. Review plan and modify as necessary by July, 2012.
2. Improve supervisory coverage/capabilities.
  - 2.1. Develop plan for supervisory coverage of maintenance and contractual activities. Initiate first phase by January, 2011 with long term organization in place by January, 2013.
  - 2.2. Review feasibility of in-house supervision of major contracted services (landscaping, security) by December, 2014.
3. Safety - Provide a safe work environment for all employees.
  - 3.1. Enhance employee safety through a formal employee safety program.
  - 3.2. Develop employee safety meeting protocol, defining frequency, employees covered, etc. by January, 2011.
4. Efficiency - Use current and future technology to automate POA services and increase efficiency while reducing costs.
  - 4.1. Investigate feasibility of utilizing credit cards for front desk transactions by June, 2012.
  - 4.2. Enhance access to WPPOA Reference Manual by making an electronic version available by January, 2013.
  - 4.3. Review WPPOA web site for potential improvement and usability by January, 2013.
5. Training – Provide focused training for individual staff members to maximize staff effectiveness and reduce outside consulting costs. Needs and training opportunities will be reviewed annually
6. Space - Provide adequate storage for POA files and equipment in addition to a comfortable work environment for employees.
  - 6.1. Replace roof by July, 2010.
  - 6.2. Conduct assessment of existing office electrical/plumbing systems by January, 2011.
  - 6.3. Complete space requirement/office need study by January, 2014.
  - 6.4. Plan to use existing office space for the next 4 to 5 years.

## **Communications Strategic Plan**

### **Goal**

Improve the value, quality, and effectiveness of communications among and between the WPPOA Board, the POA Staff, the Developer, and WPPOA members.

### **Objectives**

1. WPPOA Website – Increase the number of WPPOA property owners using the Website as an important part of their communications process with the

WPPOA Board, its Departments, and the professional Staff. Strive to make the Website the FIRST source of information for residents/Staff.

2. Governance – Promote the residents’ interest and participation in the Plantation’s governance process by informing the residents of official POA items of interest in a timely fashion.
3. Other Information Items – Provide WPPOA property owners with up-to-date and accurate information as required, using the monthly newsletter, group e-mails, the web site, and gate information boards.
4. Solicit resident input on issues through the use of ad-hoc committees.

## **Covenants Strategic Plan**

### Goal

Promote harmonious community living while protecting and enhancing the resident’s property through management oversight and the development, application, and enforcement of Covenants and Rules and Regulations.

### Objectives

1. Appropriate Regulations – Conduct continual review of the Covenants, Rules and Regulations to assure their adequacy and timeliness.
2. Educate – Provide programs that inform and educate residents of the Plantation Covenant requirements.
3. Consistent Enforcement
  - 3.1. Provide a procedure that ensures consistency in reviewing and enforcing Covenant standards.
  - 3.2. Continue current procedures of investigating complaints, contacting violators, and issuing fines when compliance is not achieved.
4. Proactive Pursuit – Be proactive in the pursuit of Covenant compliance using procedures that include the process for notification, fines, and final enforcement options.
5. Management Tools – Develop management tools to more effectively measure Covenants and Rules and Regulations, Covenants compliance, and assist in their enforcement.
6. Review - Annually review the recent application of Covenants to ensure they are still appropriate.
7. Communication - Utilize the Newsletter to inform the residents of timely Covenant issues and issues of general interest. Respond to requests for information with individual or group meetings.

## **Financial Strategic Plan**

Goal: Provide sound proactive, and farsighted fiscal stewardship through prudent management and policies.

### Objectives

1. Maintain property owner assessments and other income at a level consistent with maintaining Woodside Plantation as the premier residential community in Aiken.

2. Develop annual budgets with the input and cooperation of each Board member and include necessary maintenance items and services.
3. Avoid special assessments wherever possible by ensuring that adequate funds are available to handle scheduled and emergency repairs.
  - 3.1. Establish a fixed reserve contribution schedule for 2011.
  - 3.2. Develop a list of future improvements and prioritize projects based on anticipated revenues.
  - 3.3. Establish a minimum reserve fund for emergency repairs.
4. Seek new sources of revenue and ways to lower operational costs.
  - 4.1. Work with each Board Committee Chair to identify new sources of revenue and ways to lower expenses.
5. As requested by the Board, review existing financial policies and make recommendations to the Board as needed.
  - 5.1. Review financial policies each year.
  - 5.2. Use electronic fund transfers wherever possible.
  - 5.3. Ladder maturity dates of CD's to take advantage of rising interest rates.
6. As requested by the Board, recommend to the Board of Directors an independent auditor and the scope of the audit.
  - 6.1. Engage an auditor to prepare the annual audit and federal and state tax returns with Board approval.
7. Develop a long range capital improvement program and appropriate financial planning and support.
  - 7.1. Identify and prepare a list of capital improvements and their anticipated costs in 2010.
  - 7.2. Prepare a replacement schedule for office mechanical, electrical and plumbing systems in 2011.
8. Review and keep current minimum/maximum level of assessment allowed by covenant by 2012.

## **Property Maintenance Strategic Plan**

### Goal

Provide aggressive, cost effective long term quality maintenance of Woodside Plantation common properties, facilities, roads, leisure paths, drainage systems, and other physical assets.

### Common Area Landscape Objectives

1. Investigate and recommend appropriate improvements to maintenance programs, by:
  - 1.1. Developing, documenting and implementing a bid procedure for landscaping contractors by April 2010
  - 1.2. Determining and documenting which landscaping services are best performed in-house and which are best outsourced, by September 2010
  - 1.3. Identifying and scheduling long term, periodic maintenance activities, by December 2010. Examples:

- 1.3.1. Thinning out trees on East Gate Drive and other areas
- 1.3.2. Addressing the eroding grass line on Woodside Plantation Drive and other streets
- 1.3.3. Reviewing street corners to ensure their continued attractiveness
- 1.3.4. Develop and implement a walking trail maintenance plan and assign responsibilities, by December 2011
- 1.3.5. Continue to manage an “Evergreen” list of potential improvements
2. Monitor customer satisfaction and recommend appropriate corrective actions, by:
  - 2.1. Continuing periodic maintenance reviews with landscapers
  - 2.2. Continuing to address resident comments/complaints and responding to complaining residents appropriately and timely
  - 2.3. Continuing to use the Common Area Landscaping Committee for 360° feedback
  - 2.4. Considering surveying property owners for their views on landscaping issues, by December 2011
3. Create and review a prioritized, five-year list of capital improvements and recommend appropriate changes, for Board approval, by December 2011. This list should include such landscaping activities as:
  - 3.1. Review of roadsides on major streets regarding the issue of upgrading to sod or continuing to over seed
  - 3.2. Review of Woodside water system to determine the best use of well water vs. city water
  - 3.3. Review of sprinkler system to consider upgrading to a rain shut off system
  - 3.4. Review of our new 4 acres and create a landscaping plan
  - 3.5. Review use of maintenance-free plantings

#### Roads & Utilities Objectives

1. Inspect roads and utilities annually
2. Perform routine preventive maintenance to minimize deterioration of the facilities.
3. Establish a 5-year plan for repairs and their estimated cost (currently reviewed during the annual audit).
4. Annually review and update the 5-year plan

#### Lakes & Dams Objectives

1. Maintenance and safety:
  - 1.1. Monitor conditions of Lakes and Dams common areas with respect to water conditions, cleanliness, appearance and fish populations.
  - 1.2. Monitor performance of contractors to maintain water quality and health of the lake/dam system
  - 1.3. Coordinate required biennial DEHEC inspection of dams and spillways.
    - 1.3.1. Develop an Emergency Action Plan to respond to DEHEC and local authority direction in response to severe climatic conditions, including plans for imminent dam failure.

- 1.3.2. Review necessity for remote systems operations.
- 1.3.3. Attend DEHEC sponsored seminars to determine specific maintenance requirements.
- 1.4. Determine prudent periodicity for Professional Engineering inspections to supplement Bi-Annual DEHEC inspections.
- 1.5. Conduct annual operational checks of spillway systems as directed by DEHEC.
- 1.6. Conduct annual inspections of:
  - 1.6.1. Spillways and plunge pools for vegetation and clogging
  - 1.6.2. Tributaries and streams
  - 1.6.3. Storm drains
  - 1.6.4. Silt prevention actions by property owners and contractor.
  - 1.6.5. Proper turf grass coverage of dams and emergency spillways including irrigation systems and vegetation growth control.
  - 1.6.6. Trash and debris buildup.
- 1.7. Coordinate security inspections of lake access areas to preclude non-resident use.
- 1.8. Coordinate collection and removal of trash and debris.
- 1.9. Accompany DEHEC on Bi-Annual inspections of dams and correct deficiencies noted.
- 1.10. Coordinate with City of Aiken officials to monitor effects of lake outflow on Woodside Plantation and adjacent properties.
- 2. Recreation, safety and esthetics improvements:
  - 2.1. Maintain and stock lakes and ponds to improve fishing opportunities available to Property Owners.
  - 2.2. Conduct fishing seminars to encourage more resident enjoyment of lakes.
  - 2.3. Liaison with Common Area Landscaping to ensure proper mowing and maintenance of dam turf grasses.
  - 2.4. Liaison with security to prevent trespassing.
  - 2.5. Investigate possibility of constructing functional boat docks on all lakes to facilitate safe launching of boats and boarding of fishing craft.
  - 2.6. Ensure lake accesses are clearly marked and parking areas identified for traffic safety.
  - 2.7. Ensure proper liability insurance is maintained for all dams.
- 3. Projects:
  - 3.1. Inspect and accept ownership of lakes & dams as they are turned over from WDLP
  - 3.2. Develop a priority list of future improvements and activities for Board approval.
  - 3.3. Utilize Lakes & Dams Committee for inputs and priorities.
  - 3.4. Sort out Lakes & Dams administrative file system to provide accurate and adequate records for future WPPOA to use.
  - 3.5. Solicit membership and coordinate a group of property owners to act on a Lakes & Dams committee to facilitate the 'Objectives' above.

### Streetlights, Signs, and Miscellaneous Areas Objectives

1. RV area
  - 1.1. Obtain new keys for all RV owners (2011)
2. Woodside Plantation Drive walking path
  - 2.1. Repave/repair numerous areas of the path that have been damaged by tree roots (2012)
  - 2.2. Extend the sidewalk to the Reserve Club (2012)
3. Streetlights
  - 3.1. Purchase a hydraulic lift to facilitate repair and replacement (2010 or 2011)
  - 3.2. Replace panes of glass according to the schedule (2011)
4. Signs
  - 4.1. Survey roadside signs and replace as needed
5. POA office property
  - 5.1. Refurbish current office as required consistent with its 5 year expected use (2010, 2011)
  - 5.2. Complete repairs and upgrades to the newly acquired barn (2010)

### **Security Strategic Plan**

#### Goal

Advise the POA Board on matters of Security and Safety in an effort to provide a positive environment for the residents, guests, and staff.

#### Objectives

1. Traffic Safety and Control – Significantly reduce the number of traffic violations and incidents and minimize traffic congestion and delays at the gates.
2. Personnel
  - 2.1. Provide oversight of contracted security company and periodically review use of contracted versus in-house services.
  - 2.2. Continually monitor security manpower needs as required by increased growth.
  - 2.3. Periodically review service contractor performance
3. Prepare for the addition of the Anderson Pond Gate. Key questions are: Do we partially man? Open 24/7? Require all heavy equipment construction vehicles to use Anderson Pond gate only? Close the East Gate to any heavy vehicles?
4. Annually review the need for daytime truck patrol and hours of operation.
5. Automated Gates Program
  - 5.1. Establish a barcode installation program to accommodate demand prior to the opening of the East Gate system.
  - 5.2. Open East Gate ingress to accommodate barcode entry for all property owner/residents and other authorized users.
  - 5.3. Monitor and adjust any changes to the “open” hours of automated gates.
  - 5.4. Maintain a log of problems with any of the automated gates

- 5.5. Review need to automate Main Gate.
- 5.6. Review need to modify East Gate egress.
- 6. Consider the preparation and distribution to property owners a list of vendors with pre-approved access decals. This would give complying vendors speedier access into Woodside at three different gates. This list will encourage non listed vendors to purchase decals and would also provide residents a list of service providers that are active in Woodside Plantation
- 7. Review the vendors not utilizing the vendor decal program and encourage them to participate.
- 8. Re-study the means to establish a vendor roads fee as allowed by the covenants.
- 9. Conduct a review of gate usage and vehicle traffic in Woodside
- 10. Review and keep current SOP's
- 11. Establish a volunteer committee to inspect perimeter fences every 3 years
- 12. Utilize the "Speed Sentry System" throughout Woodside Plantation on a timely and efficient basis."

### **Architectural Review Board Strategic Plan**

Goal: Provide architectural and landscape supervision for new and existing homes and lot owners in keeping with the Woodside Plantation Covenants and Building and Landscape Guidelines. To provide services that are consistent, courteous and efficient that enhance the Woodside Plantation community.

#### Objectives

- 1. Staffing: provide the appropriate level of staffing to deal with a growing number of issues and the growth of home owners over the next several years. The current ARB Board has 5 members. There are currently 2 individuals who assist the Board that are not voting members and 85% of one paid administrative person is assigned to support the Board activities. With WPPOA board approval the board may be increased to 7 members; this will be done if a survey to be completed by August 2010 confirms the need
- 2. Records: By year end 2010, work with a "Communications Team" to determine feasibility of digitizing ARB records; this effort may impact Board size or committee needs.
- 3. ARB Guidelines review: The objective is to continue to add to and refine the Building and Landscape Guidelines to provide a clear and up to date set of requirements and suggestions for home owners, builders and vendors.
  - 3.1. By August 2010, provide a review of the Building Guidelines focused on clarity by asking new residents if they can understand these guidelines.
  - 3.2. By August 2010, provide an index restructure of the Building Guidelines, taking the "neighborhood" information from the middle of the publication and putting it at the end where it can continue to grow as the DC adds new areas and provide the opportunity to put the "basics" on the POA web site for home owners.
  - 3.3. By year end 2010, resolve the open issues with the DC.

- 3.4. Evaluate the need and purpose for an ARB Position Paper. This would be a paper written on a subject that does not lend itself to the “do’s and don’ts of the Building Guidelines. An example would be the definition of a “guaranteed view”. It is expected that one or two examples will be written for evaluation before year end 2010.
4. ARB Records: move toward a “paperless” office where it makes sense based on economy, service and efficiency.
  - 4.1. By August 2010, provide the initiative for a Communications Team. Prior to a look at digitizing ARB records, there is a need to better understand the capacity and flexibility of the POA computer network and storage. It would also include our web site. This is an Association and not just an ARB issue. This team would include computer expert, our current software author, the Association Manager, a volunteer from the 5 year planning committee and more than one Board Member. The initial goal would be to educate the Board on what we have and what the current systems can provide. It is expected that each Board member would then provide a needs assessment and that upgrades would be required to provide additional services to several areas of Association business, e.g. Covenants on line for home owner access, homeowner house plans and plats on line that can be viewed on large monitors in the office and a file provided for printing the POA Reference Manual on line for home owners. Needs assessments would also need to include some kind of cost/benefit relationship.
  - 4.2. Establish priority and budget for Communications Team needs by budget deadline for 2011.
5. Newsletter: The objective is to provide meaningful and helpful information to the home/lot owners, reminding them of ARB guidelines and encouraging their participation in the process of keeping Woodside Plantation a premier community.
  - 5.1. By August 2010, reinstate the “Taking Pride” newsletter series to help inspire home owners to do their part in keeping the great look and feel of the Plantation.
6. Relationships: The objective is to enhance relationships with builders, contractors and political entities to better enable ARB business.
  - 6.1. By January 2011 establish a relationship with the City of Aiken, specifically Larry Morris, to gather information that should be passed on to homeowners or other committees such as Streets & Utilities or others on the POA Board.
  - 6.2. Monitor South Carolina Legislature for legislation that impacts communities with a homeowners association through our Association Manager and Covenants Board Chairman. Examples include solar legislation and any State requirements of Associations as it relates to ARB Guidelines. Take action as necessary to understand and lobby throughout 2010.
  - 6.3. Work with the DC ARB to establish written materials and installation requirements for landscape companies working in Woodside that will

- 6.4. promote adherence to current guidelines. While this effort has started, it may require the rest of 2010 to complete.
- 6.5. By January 2011 provide a program for contractors that do home improvement that emphasizes the do's and don'ts of working in Woodside including the benefits of an annual vehicle pass.
- 7. Income Opportunities: Balance the need for additional revenue against the objective of keeping fees low to discourage homeowners from bypassing the review process.
  - 7.1. Implement the new fees and deposits schedule by August 2010.
  - 7.2. By January 2011 Consider providing a number of services for real estate sales people including the looking up of plat and specific lot information and making copies work of site plans, etc.

## 2010 Action Plan

### Administration

1. Conduct study and develop a benefits plan and initiate 1<sup>st</sup> phase by September, 2010. Initiate remainder of plan by January, 2011.
2. Develop plan for supervisory coverage of maintenance and contractual activities and initiate first phase by January, 2011
3. Develop employee safety meeting protocol, defining frequency, employees covered, etc. by January, 2011.
4. Replace roof by July, 2010.
5. Conduct assessment of existing office electrical/plumbing systems by January, 2011.

### Financial:

1. Establish a fixed reserve contribution schedule for 2011.
2. Identify and prepare a list of capital improvements and their anticipated costs in 2010.

### Landscaping:

1. Develop, document and implement a bid procedure for landscaping contractors by April 2010
2. Determine and document which landscaping services are best performed in-house and which are best outsourced, by September 2010
3. Identify and schedule long term, periodic maintenance activities, by December 2010.

### Architectural Review Board:

1. Complete planned survey by August 2010
2. Work with a "Communications Team" to determine feasibility of digitizing ARB records before 2011.
3. By August 2010, provide a review of the Building Guidelines focused on clarity by asking new residents if they can understand these guidelines.
4. By August 2010, provide an index restructure of the Building Guidelines.
5. By year end 2010, resolve the open issues with the DC.
6. Establish priority and budget for Communications Team needs assessments by budget deadline for 2011.
7. By August 2010, reinstate the "Taking Pride" newsletter series to help inspire home owners to do their part in keeping the great look and feel of the Plantation.
8. By January 2011 provide a program for contractors that do home improvement that emphasizes the do's and don'ts of working in Woodside including the benefits of an annual vehicle pass.
9. Implement the new fees and deposits schedule by August 2010.