



STRATEGIC PLAN

2022-2026



INTRODUCTION

STRATEGIC PLANNING is like a periodic spring-cleaning of an organization. Every rug is lifted and closet opened so stakeholders can make a frank evaluation of where we've been, where we are, and where we want to be.

What a strategic plan is:

- Member and board-driven.
- The result of a process by which stakeholders (members, board, staff, partners) review the GVR vision and mission statements and either recommit to them, or make changes.
- A set of explicit goals and initiatives that will guide the priorities of the board and staff over the next five years.

What it is not:

- A facilities expansion or enhancement plan. Specific expansion and enhancement projects are strategies that may be implemented to advance higher goals.
- A set of staff work plans. Annual work plans for both board and staff, annual budgets, communications and marketing plans, and a comprehensive, functional organizational structure will still be required. These, among others, are often referred to as "supporting plans."
- Wholly prescriptive. A good strategic plan will include a balance of explicit measures and underlying principles that together, facilitate the nimble pursuit of unexpected opportunities that are consistent with the overarching intent of the plan.

PLANNING PROCESS

Why it is important:

If diligently implemented and monitored, a strategic plan provides

- **Continuity**
 - > Eases staff and board succession which makes for a smoother member experience
 - > Identifies operating principles that provide guidance in the course of an unexpected disruption (ie. natural disaster, economic crisis, pandemic)

- **Conflict mitigation and sharpened focus**
 - > Unexpected proposals and opportunities are readily weighed against the established plan: “Does this opportunity advance a current goal? Is this proposal consistent with the principles derived from the mission and stakeholder feedback? How will pursuit of this opportunity affect the goals not yet completed?”

- **Predictability and accountability**
 - > Members, staff and Directors can anticipate that tasks and activities will occur within the context of the plan.
 - > Progress reporting processes are identified and success is defined before goals are launched.
No goal-post moving.

- **Workflow control**
 - > Goals are created with capacity and annual work plans in mind, to ensure that the goals, as well as current essential tasks, can be pursued with the resources required for excellent outcomes



The Process:

This plan began with a Request for Proposals distributed by our then-new CEO, Scott Somers. Three finalist firms were selected and each gave a presentation to the Board of Directors via Zoom. The Board then selected **Zelos, LLC** to facilitate.

Zelos began with an information-gathering phase in which they reviewed a number of GVR documents including the latest available comprehensive member survey (2018). They interviewed 64 people including members, staff, and current and former Board members. Then they conducted a limited survey of the membership which gleaned 2,814 (11.7% of membership) usable responses.

Highlights of the Survey:

75% of respondents live in Green Valley year-round. **8%** of respondents own more than one GVR property. **85% of respondents** had accessed GVR recreation opportunities in the previous three years.

Respondents liked GVR's quantity and variety of recreation opportunities, the staff, and working out (80% of respondents had used fitness centers!) **All recreation programs and offerings received good to excellent ratings.**

Respondents most wanted to see improvements in fitness facilities, making important decisions in a timely fashion, communication and responsiveness, and professionalism of Board behavior.

The Board then examined the mission and vision statements. Were they serving GVR well? Did they seem to reflect the priorities and values of the membership?

The Mission Statement needed little adjustment:

To provide excellent facilities and services that create opportunities for recreation, social activities, and leisure education to enhance the quality of our members' lives.

The Vision Statement was totally redrafted:

To be a friendly, vibrant community of choice for adults desiring lifelong opportunities for physical, mental, and social engagement.

With the new Mission and Vision statements, and feedback from the members, staff, and governance volunteers, five goals were adopted:

- 1. Provide excellent facilities** for members to participate in a variety of active and social opportunities
- 2. Provide quality services and programs** that effectively meet the recreational, social and leisure education needs of our membership, allocating resources to support those programs
- 3. Promote increased involvement** of members in GVR
- 4. Cultivate and maintain a sound financial base** that generates good value for our members
- 5. Provide sound, effective governance and leadership for the corporation**

The goals are not listed in any order of priority. All will be pursued concurrently. Members can expect progress reports on this plan at each Annual Meeting.



Goal 1: Provide excellent facilities for members to participate in a variety of active and social opportunities

(As measured by member survey questions)

INITIATIVE 1.1: Ensure that GVR infrastructure is sound, currently and into the future

(Measure: Percentage of facility repairs that could have been prevented)

- 1 1.1.1 Identify accessibility improvement areas
- 2 1.1.2 Assess and improve fitness center functionality
- 3 1.1.3 Continue to identify and execute a process for regular upkeep and maintenance/predictive maintenance procedures
- 4 1.1.4 Develop and adopt a rolling 5 year Capital Projects Plan aligned with the strategic plan
- 5 1.1.5 Introduce newer technology to improve energy efficiency when there are opportunities

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Facilities	[Progress bar]				
Recreation	[Progress bar]				
Facilities	[Progress bar]				
Finance	[Progress bar]				
Facilities	[Progress bar]				

INITIATIVE 1.2: Align the design of GVR spaces with member needs and their intended purpose

(Measure: Member survey questions)

- 6 1.2.1 Create function-designated rooms with proper lighting, A/V, seating, furnishing, flooring, ventilation, etc. to compliment and support specific activities
- 7 1.2.2 Assess spaces for specific activities and equip those spaces properly, such as art class space with washable floors
- 8 1.2.3 Research and develop recommendations for providing food and beverage in certain centers
- 9 1.2.4 Evaluate and improve capital request processes
- 10 1.2.5 Employ newer technologies to benefit members' abilities to fully utilize facilities

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Recreation and Facilities	[Progress bar]				
Recreation and Facilities	[Progress bar]				
Recreation and Facilities	[Progress bar]				
Recreation and Facilities	[Progress bar]				
Recreation and Facilities	[Progress bar]				

INITIATIVE 1.3: Improve the aesthetics, atmosphere, and branding of GVR centers

(Measure: Member survey questions)

- 11 1.3.1 Develop, plan, and schedule to keep finishes and amenities up to date
- 12 1.3.2 Update interior and exterior furnishings, door hardware, landscaping, and amenities, campus-wide
- 13 1.3.3 Improve interior and exterior signage: complete, consistent, accessible, concise, attractive
- 14 1.3.4 Implement standard and electronic signage to heighten communication of activities and events

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Facilities	[Progress bar]				
Facilities	[Progress bar]				
Communications	[Progress bar]				
Communications	[Progress bar]				

INITIATIVE 1.4: Expand/repurpose facilities to promote and encourage social gathering

(Measure: The number of social spaces created annually)

- 15 1.4.1 Explore opportunities to establish coffee shop, etc.
- 16 1.4.2 Design peripheral grounds to provide outdoor recreation opportunities: park-like settings, walking trails, outdoor games, and activities
- 17 1.4.3 Identify under-utilized areas that could be used for this purpose

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Recreation and Facilities	[Progress bar]				
Recreation and Facilities	[Progress bar]				
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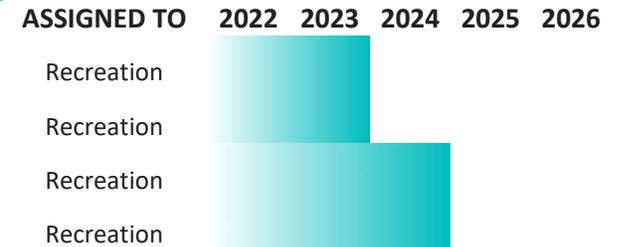
Goal 2: Provide quality services and programs that effectively meet the recreational, social, and leisure education needs of our membership, allocating resources to support those programs

(As measured by member survey questions)

INITIATIVE 2.1: Provide quality programs and services to meet the needs of all income levels and abilities of current and future members

(Measure: Member survey questions)

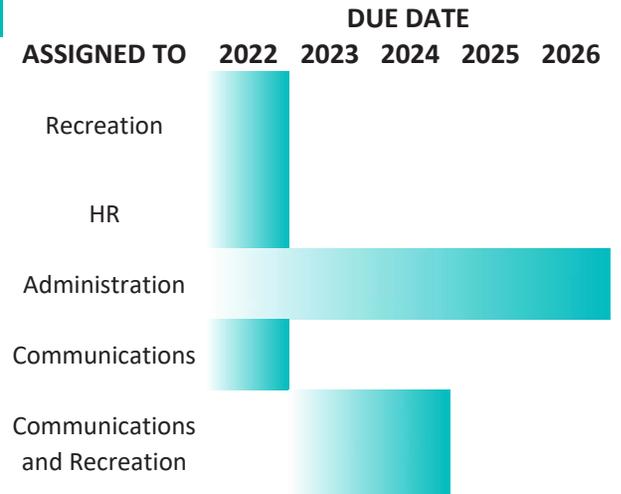
- 18 2.1.1 Review current programming and make adjustments, if needed, to ensure variety and alignment with current and future member needs
- 19 2.1.2 Explore a varied activity/service structure that accommodates all income levels
- 20 2.1.3 Explore the possibility of virtual offerings for part-time residents and those homebound
- 21 2.1.4 Review and improve, if necessary, processes to assess quality of services and programs



INITIATIVE 2.2: Provide exceptional customer service

(Measure: Member survey questions)

- 22 2.2.1 Implement a quality assurance system to ensure that exceptional customer service is happening, such as secret shopper, a review schedule to see how systems and processes are operating
- 23 2.2.2 Implement standardized customer service training for all staff, based on clarified policies and expectations, to ensure consistency in service
- 24 2.2.3 Develop relationships with similar organizations to share trends, best practices, and steps to overcome customer service challenges
- 25 2.2.4 Clarify communications procedures and distribute messaging to all staff so members receive consistent, trustworthy information from all GVR representatives
- 26 2.2.5 Develop and implement a member experience review plan related to customer service by department (similar to 2.2.1)



INITIATIVE 2.3: Ensure that instructors/program-related contractors for services are well-qualified and aligned with GVR values/principles

(Measure: Instructor surveys following each class or program)

- 27 2.3.1 Explore changes in process of instructor hiring, actively recruiting instructors to meet member needs
- 28 2.3.2 Explore guidelines with evaluation criteria for instructors and make improvements, if necessary





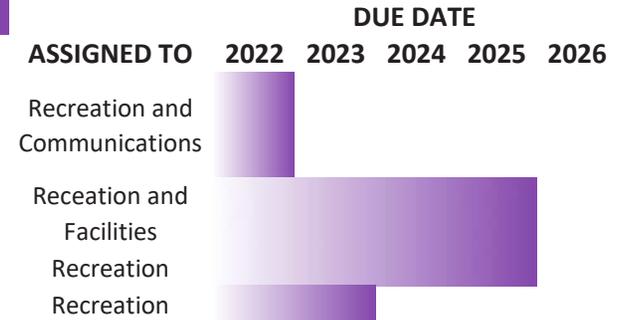
Goal 3: Promote increased involvement of members in GVR

(As measured by rate of participation in surveys and elections, and by member participation in GVR activities and facilities)

INITIATIVE 3.1: Provide programming and events that appeal to members at all income and ability levels (see also 2.1 and the associated initiatives)

(Measure: Member survey questions)

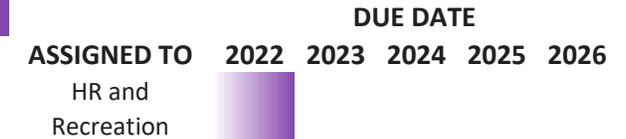
- 29 3.1.1 Work with communications to promote and highlight activities and events that are accessible to members with mobility challenges and other age-related limitations
- 30 3.1.2 Explore the idea of allocating space for specialized fitness centers
- 31 3.1.3 Continue to identify programming and events that members want
- 32 3.1.4 Develop a prioritized 5 year plan for programming events



INITIATIVE 3.2: Increase member participation in volunteer opportunities that support GVR activities

(Measure: Number of volunteers annually)

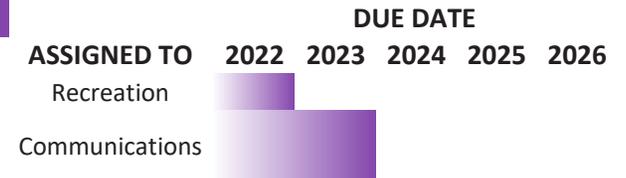
- 33 3.2.1 Develop a sustainable volunteer program, including recruiting and training of volunteers, to support GVR activities



INITIATIVE 3.3: Ensure systems and processes are easy, simple, and customer/member-centric

(Measure: Member survey questions)

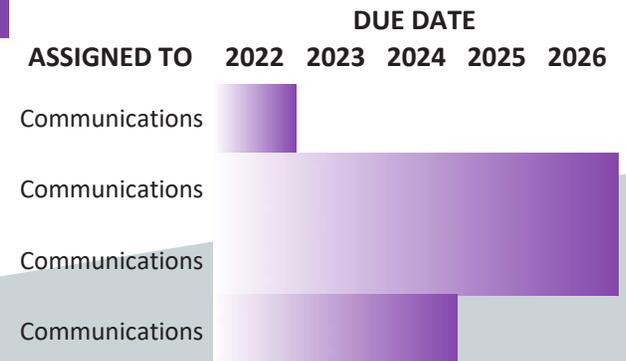
- 34 3.3.1 Conduct a policy and process review
- 35 3.3.2 Improve ease of access to GVR activity schedule and opportunities



INITIATIVE 3.4: Consistently communicate with members so that they will know what is happening, be able to provide timely input, and participate in the GVR electoral process

(Measure: Member survey questions)

- 36 3.4.1 Create a communications plan for election and committee selection processes to increase voter turnout and find qualified people willing to serve
- 37 3.4.2 Continue to seek member feedback on a wide variety of matters via polls, surveys, in-person forums and virtual forums
- 38 3.4.3 Publicize recreation program, GVR events and GVR club events via diverse communications channels
- 39 3.4.4 Assess and replace, as needed, current digital platforms with more accessible options





Goal 4: Cultivate and maintain a sound financial base that generates good value for our members

(As measured by increases in net assets and fund balances; as measured by a member survey (related to good value))

INITIATIVE 4.1: Diversify revenue to help moderate potential future dues increases

(Measure: Amount of net revenue generated)

40 4.1.1 Identify options and tradeoffs for revenue diversification

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Finance	█				

INITIATIVE 4.2: Review planned expenditures to ensure good stewardship of funds

(Measure: Review process utilized consistently)

41 4.2.1 Evaluate maintenance repair and replacement (MR&R) to confirm need

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Facilities and Finance	█	█	█	█	█

42 4.2.2 Explore transitioning to hybrid/electric vehicles when existing vehicles are replaced

INITIATIVE 4.3: Ensure strong fiscal management

(Measure: Board survey question)

43 4.3.1 Update and recommend financial policies

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Finance	█				

44 4.3.2 Develop a plan for economic downturns

45 4.3.3 Employ sound investment strategies to maximize passive income

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Investment Committee and Finance	█	█	█	█	█

46 4.3.4 Provide continuous education for Board, committees, and staff about GVR financial management and positions so that they can make decisions and monitor effectively

INITIATIVE 4.4: Plan adequately for the future, in a fiscally responsible manner

(Measure: Board survey question)

47 4.4.1 Review the 3-year annual financial forecast with the Board

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Finance	█	█	█	█	█

48 4.4.2 Update and adopt a rolling 5-year capital plan

49 4.4.3 Maintain and continue to utilize the reserve study (MR&R)

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Finance and Facilities	█	█	█	█	█

GOAL 5: Provide sound, effective governance and leadership for the corporation

(As measured by member, staff, and Board survey questions – surveys to be developed)

INITIATIVE 5.1: Provide varied and effective methods for the Board to proactively communicate and dialogue with members about organizational direction and decisions

(Measure: Member survey questions)

- 50 5.1.1 Provide staff support to the Board of Directors to enable proactive, complete communications about Board decisions
- 51 5.1.2 Improve virtual access to meetings, including committee meetings

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Administration	██████████				
Administration and IT	██████				

INITIATIVE 5.2: Work together effectively as a Board

(Measure: 1. Board survey questions; 2. the number of items successfully accomplished in a year) 2.) the number of items successfully accomplished in a year)

- 52 5.2.1 Review the strategic plan regularly to ensure progress on action items and continuity year-over-year with the plan
- 53 5.2.2 Develop and adopt operating commitments for the Board that demonstrate courtesy, consideration, mutual respect, and willingness listen to one another and to staff
- 54 5.2.3 Utilize staff liaisons and the strategic plan to support continuity of direction

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Administration and Board	██████████				
BAC and Board	██████				
Chairs and Staff Liaisons	██████████				

INITIATIVE 5.3: Create a shared understanding of what it means to be effective leaders at GVR

(Measure: Staff survey questions)

- 55 5.3.1 Work with the CEO on developing the annual performance evaluation tool, ensuring that it aligns with job description, employment agreement, governing documents, and workplan
- 56 5.3.2 Develop a list and description of GVR values/principles and articulate roles and responsibilities
- 57 5.3.3 Provide training and team activities to help people demonstrate these GVR values
- 58 5.3.4 Incorporate values into performance management

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Board and CEO	██████				
Board	██████				
HR	██████				
HR	██████				

INITIATIVES 5.4: Ensure continuing education for Board and staff

(Measure: Number of trainings or professional meetings attended by staff or Board)

- 59 5.4.1 Encourage staff and Board to attend training conferences and participate in professional associations

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Administration and HR	██████████				



INITIATIVES 5.5: Ensure there is continuity of operations

(Measure: Plan developed)

61 5.5.1 Develop a continuity of operations plan that includes evacuation locations, IT operations, personnel emergency succession, document preservation, etc.

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Administration					

INITIATIVE 5.6: Maintain good community relations with entities outside of GVR

(Measure: needs to be developed)

62 5.6.1 Participate/partner with outside organizations such as Rotary, Chambers, GVC, GGVCF, etc.

ASSIGNED TO	DUE DATE				
	2022	2023	2024	2025	2026
Administration and Board					

