



To: Board of Directors

From: Scott Somers, CEO

CC: GVR Senior Staff

Date: February 25, 2026

RE: 2026 Recommended Annual Workplan

Administration/CEO

2.2.3 Develop relationships with similar organizations to share trends, best practices, and steps to overcome customer service challenges

- Survey similar organizations and share results with the Board of Directors, as appropriate.

5.1.1 Provide staff support to the Board of Directors to enable proactive, complete communications about Board decisions

- With Communications, synthesize Board actions/decisions to communicate with the Members. (Ongoing)

5.2.1 Review the Strategic Plan regularly to ensure progress on action items and continuity year-over-year with the plan

- Complete and present an Annual Workplan to the Board for approval. (February)
- Continue providing a quarterly report in the Meeting Book to the Board and post the Final Annual Work Plan report on the Governing Documents and Reports section of the website.
- Provide an update to the Board on the Final Annual Workplan as part of the CEO performance evaluation. (December)
- Process for completion regarding Strategic Plan and preparation of the 2027-2031 strategic plan. **Board held a Work Session in January 2026.**

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

- Rotary Club of Green Valley membership.
- GVR Foundation Board meeting.
- GVC Executive Committee.
- GVC Representative Meeting.
- University of Arizona Community Advisory Board member.

Board and Committees

4.3.3 Employ sound investment strategies to maximize passive income

- Investment Committee and Finance. (Ongoing)

5.2.2 Develop and adopt operating commitments for the Board that demonstrate courtesy, consideration, mutual respect, and willingness to listen to one another and staff

- Board credo was developed and adopted.
- Conduct a follow up of the facilitated 2025 fall workshops with the Board to develop agreements and understandings on roles and responsibilities, particularly with Board advisory committees, committee chairs, and officer positions. (April)

5.2.3 Utilize staff liaisons and the Strategic Plan to support continuity of direction.

- Staff liaison functions to be facilitated by Administration to ensure committee continuity. (Ongoing)
- Implement revised committee structure if passed per the Bylaws. (June)
- Develop a process for recruiting committee members. (June)

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

- Research and identify Board training opportunities. (April)
- Survey Board of Directors for what they would like for training, including training to support and encourage teamwork. (April)

Communications

1.3.3 Improve interior and exterior signage: complete, consistent, accessible, concise, attractive

- Continue reviewing and updating as necessary.

1.3.4 Implement standard and electronic signage to heighten communications of activities and events.

- Review and assess benefits of installing big screen TVs in all centers to highlight activities and events. (July)

3.3.2 Improve ease of access to GVR activity schedule and opportunities

- With Recreation, develop a “getting started” program to provide instruction and supplies for drop-in activities. (September)

3.4.2 Continue to seek member feedback on a wide variety of matters via polls, surveys, in-person forums and virtual forums

- Survey members on topics as needed and share results with Board and members, and if significant, post on the website. (Ongoing)

Facilities Department

1.1.5 Introduce newer technology to improve energy efficiency when there are opportunities

- Convert lighting in Clay and Ceramics studios to LED
- Identify and begin installing thermostats to improve consistent temp controls
- Continue reviewing and implementing campus wide energy efficiency and dark skies strategies where appropriate.

1.2.3 Research and develop recommendations for providing food and beverage in certain centers (Includes Recreation Department)

- Research vending machine options. Research for café at DSC has occurred but more research is needed to install vending machines in other centers. (August)
- As budget allows, modify the LC lobby to improve seating and provide a refreshments counter (December)

- Consider food and beverage services at the DSC. (February)
- 1.3.2 Update interior and exterior furnishings, door hardware, landscaping, and amenities campus wide
- This work will continue indefinitely.
- 1.4.2 Design peripheral grounds to provide outdoor recreation opportunities: park-like settings, walking trails, outdoor games, and activities
- Per results of member poll, install rudimentary cornhole courts at EC and CR to test interest. Design a park-like setting for casual social gathering at Las Campanas, west of the pool.

Finance Department

- 4.2.1 Evaluate Maintenance Repair and Replacement (MR&R) to confirm need. (Ongoing)
- Confirm all numbers and data for both MRR-A and B are accurate prior to distribution. (Ongoing)
- 4.3.4 Provide continuous education for Board, committees, and staff about GVR financial management and positions so that they can make decisions to monitor effectively.
- Continue providing quarterly financial updates to Board and detailed financial statements to the FAC. (Ongoing)
 - Provide annual primer on reading financial statements. (Board Orientation)
 - Review Fund EZ Purchase Order System, and other third-party PO systems and implement as necessary. ***The Fund EZ PO system was found to not be adequate for GVR's needs. Other systems are currently being reviewed. A budgeting and project costing system has not been identified but research is ongoing into 2026***
- 4.4.1 Review the 3-year annual financial forecast with the Board
- Present 3-year annual financial forecast as part of the annual budget document. (Annually)
- 4.4.3 Maintain and continue to utilize the reserve study (MRR) (Ongoing)

Human Resources

- 2.2.2 Implement standardized customer service training for all staff, based on clarified policies and expectations, to ensure consistency in service. (Ongoing)
- 3.2.1 Develop a sustainable volunteer program, including recruiting and training of volunteers, to support GVR activities (Ongoing)
- Volunteers are currently utilized. If the Board want to expand, then we should schedule a W Work Session on this matter.
- 5.3.3 Provide training and team activities to help people demonstrate these GVR values (Ongoing)

IT Department

- 1.2.5 Employ newer technologies to benefit members' abilities to fully utilize facilities
- Simplify members experience while using GVR rooms and a/v equipment. Providing GVR laptops to each major center to create consistency and ensure compatible connections. (Ongoing)
- 5.5.1 Develop a continuity of operations plan that includes evacuation locations, IT operations, personnel emergency succession, document preservation, etc.
- Desert Hills has been designated by IT as the primary server, database, and file failover location. Nightly backups are generated at AO and replicated to DH to ensure continuity in

the event of a disaster. DH also maintains continuously synchronized copies of all major operating systems, enabling near-real-time system duplication with an estimated 10-second latency.

Member Services Department

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.

- Work with attorney to gain additional knowledge with regard to GVR's boundary, master development agreements, deed restrictions, title agreements, and collections. Better define/understand GVR's boundaries. (Ongoing)
- Continue to explore and find solutions to identify and decrease membership and guest card misuse. (Ongoing)
- Partner with Communications to create a new, comprehensive New Member Welcome Packet. (July)
- Partner with Communications to create and distribute a realtor information sheet. (October)

3.3.1 Conduct a policy and process review.

- Investigate possible alternatives to our current membership database to combine databases, add capabilities, and improve overall experience (occurring in 2026)

Recreation Department

1.1.2 Assess and improve fitness center functionality

- Work with facilities on plans to expand the Las Campanas Fitness Center. (August)

1.2.2 Assess spaces for specific activities and equip those spaces properly, such as art class space with washable floors

- Work with Facilities and Field Services to identify and equip specific rooms suited for activities that can be restricted to these rooms; i.e. poker, yoga, etc. (Ongoing).

1.2.5 Employ newer technologies to benefit members' abilities to fully utilize facilities (See Facilities).

- Investigation options to implement an online reservation system as part of an updated system/systems for Membership and Recreation (Ongoing).

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.

- Identify specific, on-going activities and events which meet these criteria and furnish a list to Communications for follow up (August)

3.1.3 Continue to identify programming and events that members want.

- Gradually expand food and beverage offerings at West Center (large events such as concerts and dances) and Del Sol Clubhouse (smaller, typically free events) in a disciplined manner which continually retains popular food/beverage choices and regularly offers new options. (Ongoing)

3.3.1 Conduct a policy and process review

- Complete SOP documentation for all Recreation functions (August)