



2017 – 2020 Strategic Plan

The following information is based upon the information obtained from the Board and Board direction given at the May 9, 2017 Strategic Planning Workshop, as well as and input provided by the Delegates, Apartment Community Managers and Sports Leagues. The Strategic Plan is developed consistent with SAMLARC's Mission and Vision Statements. The following 2017-2020 Strategic Plan was approved by the Board of Directors at the Open Session Board of Directors Meeting held Tuesday, September 26, 2017. It was re-evaluated and updated at the September 25, 2018 Board of Directors Meeting.

Goal: To enhance property values through well maintained park facilities and amenities, and well-maintained neighborhoods

Objectives:

Park Facilities and Amenities

- Bring the lake into a balance that can support fish and re-establish Lake vitality to include fishing and other compatible aquatic activities
 - Work with the SMWD to utilize the lake for irrigation
- Continue to maintain a high level of facilities maintenance
 - Measured by establishing maintenance standards and evaluating vendors based upon the standards (2019 Initiative)
- Bring landscape back to pre-drought conditions (Continues to be in progress)
 - Replace trees that were lost due to the drought
 - Continue replacing old landscape with water wise landscape material
 - Seek grants to off-set the cost and return the slopes and streetscapes back to pre-drought beauty
- Ensure community parks, amenities and trails are relevant and current in its facilities to support property values and desirability
 - Conduct a facility assessment to repurpose and/or refurbish facilities
 - Install shade structures in Central Park and Arroyo Vista Park and at other Parks as funds become available
 - Replace worn concrete at pools with pavers
- Convert the lights at our lighted sports fields (Tijeras Creek, Cañada Vista) from standard bulbs to LED's.
- Offer Wi-Fi service at the Beach Club
- Develop a Trails Master Plan to include trailhead signage linking all SAMLARC trails
- To demonstrate the value, importance and role youth and adult sports play in a well-rounded and desirable community (Ongoing)
 - To keep athletic field use fees reasonable in an effort to make programs affordable to members
 - To provide the best athletic facilities possible within the SAMLARC budget
 - The Youth Sports Council to become a Chartered and recognized SAMLARC committee
 - To continue to partner with the youth sports organizations regarding improvements to and maintenance of SAMLARC athletic facilities
 - With input from the Sports Council, develop a list of sports projects and incorporate into the 3-Year Capital Improvement Plan. Revisit and revise annually with input from the Sports Council

- Construct a life-size checkerboard game board/dance floor outside of Fiesta Room to be used for dancing at various events and by residents as a checkboard at any time
- Develop a Perimeter Defensible Space Master Plan (2019 Initiative)
- Develop an Active Lake Management Plan (2019 Initiative)
- Develop an Active Landscape Management Plan (2019 Initiative)
- Lake Ecosystem Repair and Restoration Projects
- Consider seeking a sponsor or sponsors for the Lake project

Well-Maintained Neighborhoods

- To encourage Mediterranean water wise plants and drought tolerant landscaping as much as possible
- Refresh the Paint Palette
- To develop water wise standards that include Mediterranean landscape and plant palette, and an education plan to ensure its success. (The Architectural Review Committee to review and better define the Architectural Standards related to landscape and present their plan to the Board at the July 26, 2016 Board of Directors Meeting - objective completed)
 - Management to work with Architectural Review Committee on a Marketing Plan to inform membership of landscape standards using the term Mediterranean type landscape. Plan to include:
 - A Pamphlet highlighting homes and acceptable plant material
 - Develop a "4-shot" social media campaign
 - Lowe's partnership
 - SMWD
 - Column on SAMLARC.org
 - Develop an Educational Plan to include:
 - Articles in Rancho Living
 - Special mailer to Membership similar to the Park Amenities Guide included in a copy of Rancho Living
 - Realtor pamphlet
 - Share with the sub maintenance associations to encourage and assist them in developing their own program.
- Work with interested sub maintenance corporations to match SAMLARC's Architectural Standards where possible to minimize confusion for homeowners and Boards, eliminate discrepancies and simplify the application process. Include exterior painting timeline recommendation in the Architectural Standards.

Goal: To ensure that SAMLARC maintains the "quality of life" and sense of community through social, recreational and community events and programs

Objectives:

- Establish a Community Lifestyle Committee with a focus on programming that meets the needs and interest of the Membership
 - Secure representation from the Apartment community
 - Re-evaluate and enhance the current Sponsorship and Volunteer Programs (2019 Initiative)
 - Further expand the Recreational Class offerings to meet interests and demographics

- Create a program named "Join Me". These would be member gathering programs such as "Bike the Trails" or "Walk the Parks". They could become clubs led by volunteers
- Enhance and add to the current Community Events list
- Expand the SAMLARC Photo Contest to include an Events category in which residents are able to submit photos taken at SAMLARC events and programs*
- Provide community lifestyle programming to meet Member interest, as well as complement programming offered by other entities within Rancho Santa Margarita and does not duplicate efforts or compete with other agencies/entities and is cost effective
- Continue to provide activities for all age levels, young children through
 - Conduct a survey of the SAMLARC Membership to determine needs, wants and desires (2019 Initiative)
 - Encourage the development and coordination of new affordable educational programs with the Bell Tower & City of RSM (2019 Initiative)
- Promote interest groups to meet up or otherwise contact each other. This could range anywhere and everywhere from moms with baby strollers doing group walks around the lake to pickle ball and tennis enthusiasts joining up to take advantage of our park facilities (2019 Initiative)
- Consider offering community theater or summer barbecue with a movie

Goal: To build and develop relationships internally within SAMLARC and externally with organizations that can better SAMLARC's purpose, mission and vision

Objectives:

Communications

- Improve SAMLARC's brand
 - Trademark the SAMLARC Logo
- Promote services through the media
- Evaluate social media platforms (Facebook, Twitter and Instagram) for effectiveness
- Ensure the Communications has an adequate budget to accomplish the tasks needed
- Evaluate the need for a second full time communications coordinator (2019 Initiative)
- Create SAMLARC owned email addresses for the Board

Internal Relationships

- Inclusiveness of staff into SAMLARC operations and events
- Establish honors and rewards program to be defined by Board of Directors
- Join CPRS
- Meet bi annually with the apartment communities to determine how SAMLARC can better serve their residents (Suggest annually. Most successful has been monthly meetings with individual Apartment Community Managers)
- Include \$1,500 in the 2018 Draft Budget for onsite apartment community programming to be further considered by the Board at the 2018 Budget Workshop.
- Develop an Apartment Community Communication Plan working with the Apartment Community Managers.
- Establish regular landscape meetings with the Apartment Community Managers to address adjacent SAMLARC landscape issues.

- Expand Delegate Workshops from two annually to four annually
- Survey the Delegates regarding unique issues related to sub maintenance corporations, a new format to communicate with SAMLARC, and areas where SAMLARC needs to provide maintenance
- Use results from May 2017 Delegate Workshop to further research and create a Delegate communication system, between Delegates as well as with SAMLARC
 - Work with interested sub maintenance corporations to create a provide group Facebook page that would be managed by the sub maintenance corporations.
- Create a community recognition program that could include the following:
 - Volunteer projects
 - Home improvements
 - Homeowners helping homeowners
 - Delegate efforts

External Relationships

- Offer joint programs with the City and the Chamber to strengthen partnerships and unite the groups together for the good of the community
- Promote our environmental impact on the community and to be involved in Rancho's Zero Trash Initiative on Rancho Living, Website
- SAMLARC Citizen Award per Quarter – Nominations taken and the Board chooses
- Consider extending SAMLARC Membership to facilities to non-SAMLARC Members
- Assist the City of RSM & the Chamber to improve the economic viability of Rancho Santa Margarita by the attraction and retention of businesses:
 - Promoting the community benefits of SAMLARC
 - Promoting fiscal strength and stability in the community

Goal: To ensure that fiscally SAMLARC remains sound and that sufficient funds are available to maintain, enhance and improve SAMLARC facilities, as well as maintain the "quality of life" and sense of community through social, recreational and community events and programs

Objectives:

- Annually perform assessment increase modeling small annual increments versus a one-time 20% increase