"Sounds boring—and hard. Not something our HOA needs."

Hold on—this special edition could change your mind, and give you tools to get started! …

"A strategic plan outlines priorities and projects for the immediate future and for years to come. Yet the best plans accommodate revisions as changing circumstances dictate... It's a road map and there are typically detours and changes in the path to the ultimate destination."

Excerpted from "Take the Lead" by Steve Bates, which lays out key principles of effective strategic planning and illustrates with a case study of an HOA. The article appears in Common Ground (September/October 2013), a publication for association owners and the community management industry.

Read the full article here.

Here's the 411 on Strategic Planning

The Foundation for Community Association Research offers, Best Practices on Strategic Planning, Download a free pdf which describes the planning process, includes sample visions and mission statements and illustrates with several cases studies.

"A goal without a plan is just a wish."

Board Briefing on Strategic Planning
Why Does your HOA Need an SP?

As members rotate on and off the board, and time passes, association leaders benefit from a map to get their bearings as they carry out their responsibilities. An SP is:

- A mental picture of what the community wants to achieve over time.
- A unifying purpose
- An objective, fact-based tool for decision-making.

Sincerely,
Judi M. Phares - CMCA®, PCAM® Publisher
What are the ingredients of an SP?

An SP model can be adapted to suit the needs of HOAs. Most SPs include some variation of the components shown in Figure 1. In this case, SWOT analysis of Strengths, Weaknesses, Opportunities and Threats has been replaced with an analysis of Assets and Outcomes. Significant Gaps between Assets and desired Outcomes should be addressed in Goals and Priorities.

Following are samples and tools to illustrate how to implement the four phases shown in the Figure 1 Venn diagram.

1. **Starting with the outer circle (Figure 1)**, you’ll write a Vision Statement. A vision statement answers three questions shown in Figure 2.

![Figure 1](image1.png)

**Example**

**Amazon:** “Our vision is to be earth’s most customer centric company; to build a place where people can come to find and discover anything they might want to buy online.”

Find free training videos and examples, plus templates, samples of how to write a vision statement and mission statements at [http://www.specimentemplates.org/mission-statements/index.htm](http://www.specimentemplates.org/mission-statements/index.htm)

2. **In the next circle (Figure 1)**, you narrow your focus. A mission statement is written succinctly in the form of a sentence, but for a shorter timeframe than a vision statement.

![Figure 2](image2.png)

**Example of an HOA’s Vision and Mission Statements**

**Target:** “Make Target the preferred shopping destination for our customers by delivering outstanding value, continuous innovation and an exceptional experience by consistently fulfilling our Expect More Pay Less brand promise.”

**CMA Management:** “To serve our communities with an outstanding team of professionals who provide quality service and are dedicated to excellence in community association management.”

Here are examples of an HOA’s Vision and Mission statements:

**VISION STATEMENT**

“To be the premier master planned community in North Texas.”

**MISSION STATEMENT**

*Preserve the quality and character of our association for our residents by offering attractive amenities, lifestyle opportunities and leadership which protect and enhance property values and preserve the long term financial health of the community.*

*Courtesy of Stonebridge Ranch Community Association, McKinney*

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3. **Identify Assets you have and Outcomes you expect.** For example, does your community have a reserve study? Has it been updated in the past 5 years? A reserve study is an asset, as are facts about the history of the association, and previous plans. Outcomes should sync up with the mission statement as results of the plan.

4. **Choose one or two key Goals and Priorities to work on each year.** Analyze and identify the Gaps between Assets and Outcomes. These will become goals. Resist the temptation to have ten priorities. Scale your goals to your resources, to fit with the time and funds available.

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**Getting There!**

With your SP in hand, you and future board members have a road map for making decisions for the community. Sweet!

Here’s to your plan for civic health!

Who doesn't love a delicious, warm cookie as a reward for a weighty, task, well done?
### 30 Years of Community. Well Served.

Celebrating 30 years of LEADERSHIP setting benchmarks and professional standards in the community association management industry. [Find out more](#).

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