

# Lake Monticello Strategic Plan

Lake Monticello is a private and gated, self-governed residential community with a diverse population of working and retired individuals and families.

## Vision

Lake Monticello will be an exceptional place for all to live and engage in recreational, social, and learning activities.

## Mission

To achieve our vision, the Members, leaders and staff of the Lake Monticello Owners' Association will preserve and enhance our community.

## Strategic Goals

1. Preservation of the beauty of our community
2. Enhanced and well-maintained amenities
3. Safety and general welfare of residents, staff and visitors
4. Acquisition and effective management of LMOA assets and resources
5. Active and open dialogue among Members, residents, leaders, staff and the community at large
6. Facilitation of learning opportunities for residents of all ages

*The LMOA Board of Directors approved Version 3.0 of the Strategic Plan on 26 June 2008.*

*The LMOA Board of Directors approved Version 4.0 of the Strategic Plan on May 27, 2010.*

*This Plan is a 'living document' that will guide future actions by the Board of Directors and will be adjusted and amended by them, as needed, with the continued support of the Planning Committee.*

# Objectives and Action Steps

Strategic Focus	Strategic Goal
<b>1. Beauty of our Community</b>	Preservation of the beauty of our community
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
1.1. Maintain and enhance the beauty of LMOA common areas	<ul style="list-style-type: none"> <li>a. Continue to support the Lake Monticello Beautification Corps with financial assistance, manpower and equipment as needed. Prepare for the day when staff will have to do more of the work. <b>ONGOING.</b></li> <li>b. Establish a volunteer "Adopt A Road" program.</li> <li>c. Tour other similar communities to discover 'best practices'.</li> <li>d. Conduct in-depth inspection of all LMOA properties, land and buildings. Assess the beauty of all LMOA properties and make necessary improvements.</li> </ul>
1.2. Encourage and recognize the beauty of individual properties	<ul style="list-style-type: none"> <li>a. Encourage the formation of volunteer Neighborhood Work Groups to improve the general appearance of neighborhood.</li> <li>b. Establish "LMOA Care Days" to help those who can not help themselves improve the general appearance of yard and/or home.</li> <li>c. Establish a program to facilitate sharing of plants, augmented by seasonal bulk purchases of flora at wholesale prices.</li> <li>d. Work with absentee owners and owners of rental units to improve properties.</li> <li>e. Provide public recognition and awards to homeowners and Neighborhood Work Groups who implement exemplary property beautification, erosion control and storm water management.</li> </ul>
1.3. Provide consistent, prompt, effective, and efficient enforcement of the LMOA governing documents	<ul style="list-style-type: none"> <li>a. Hire a compliance officer to enforce the LMOA Rules and Regulations.</li> <li>b. Develop new schedule of substantial fines and sanctions to be applied with consistency when homeowners do not follow LMOA regulations and policies.</li> <li>c. Ensure that those who rent properties at Lake Monticello are given a copy of the rules and regulations and that they understand that they, along with the property owner are responsible for full compliance.</li> <li>d. Develop and distribute to all property owners a brochure that summarizes revised rules and regulations.</li> <li>e. Annually review policies and regulations to ensure consistency with our Vision; update as required.</li> </ul>
1.4. Encourage the use of environmentally	<ul style="list-style-type: none"> <li>a. All projects in Lake Monticello follow best management policies regarding storm water management and erosion control.</li> </ul>



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<b>1. Beauty of our Community</b>	Preservation of the beauty of our community
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
sound technologies and practices to protect the environment	b. Engage a consulting environmental engineer to guide the implementation of drainage work, lake health issues, and to assist the office of Environmental Compliance and Control in their work.
	c. Ensure the ECC members and LMOA maintenance staff are appropriately trained and certified in Erosion and Sediment Control and/or Administration.
	d. Use innovative environmental practices on LMOA construction projects of any size.
1.5. Maintain and promote an abundance of trees throughout the community	a. Implement program to encourage Members to plant trees on their property by providing inexpensive or free trees.
	b. Encourage Members to establish a buffer of shrubs and/or trees in order to help protect the shorelines of our creeks and lakes and the lake water quality.



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Strategic Focus	Strategic Goal
<b>2. Recreational and Social Amenities</b>	Enhanced and well-maintained amenities
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
2.1. Protect and improve the lakes and ponds through ecologically sound measures implemented by the Association and individual property owners	a. Continue implementation of the lake improvement program.
	b. Execute the lake dredging program.
	c. Develop and publish best environmental practices for use by residents
2.2. Provide and maintain high quality recreational and social amenities	Beaches
	a. Add faucets and/or showers at beaches.
	b. Add additional umbrellas at beaches.
	c. Install bathrooms at beaches 4 & 5.
	d. Add additional parking at Beach 2.
	e. Expanding swimming area at Beach 3. <b>COMPLETE as of May 2010.</b>
	Swimming Pool
	f. Complete renovation of bathhouse and other on-going pool improvements. <b>COMPLETE as of May 2010.</b>
	g. Provide shaded area at the baby pool. <b>COMPLETE as of May 2010.</b>
	h. Extend operating hours of the swimming pool.
	Tennis
	i. Install practice wall at tennis courts, for individual practice.
	j. Establish plan and funding for resurfacing of tennis courts.
	Athletic Fields
	k. Maintain and upgrade all athletic fields; add bathrooms at Lafayette tennis courts.
	l. Remediate erosion at Bunker ball field.
	m. Provide lighting at Bunker ball field for night games and walking.
	Walking Paths
	n. Develop comprehensive plan for installation of additional walking paths on LMOA properties; develop and install as appropriate.
	o. Establish hiking trail on the gas pipeline right-of-way.
p. Establish a nature education trail on the Stables property.	
Playgrounds	
q. Maintain playgrounds as a safe and clean environment for children.	
r. Seek Member input on desirability of additional equipment; install as appropriate.	
Main Clubhouse	
s. Extend weekend access to Main Clubhouse facilities.	



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<b>2. Recreational and Social Amenities</b>	Enhanced and well-maintained amenities
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	s.1 Improve lighting outside Main Clubhouse.
	Food Services
	t. Maintain food service at Eagle's Nest; consider vendor-operation, if beneficial to quality and financial outcomes.
	u. Maintain food service at Main Clubhouse as vendor-operated facility.
	Fishing
	v. Build handicap-compatible fishing pier.
	Social Amenities
	w. Reinvigorate the Social & Recreation Committee.
	x. Hire a full-time director of Social and Recreational Activities.
	y. Establish and operate a summer day-camp for children of Member residents.
	General
	z. Re-examine our amenities policy: fee vs. free. Consider expanded bundling of an amenities package as an alternative to buying individual items.
aa. Provide increased compliance monitoring of correct use of amenities.	
2.3. Maintain and improve the golf course, its ancillary facilities and fee structure so that it is the venue of choice for LMOA Members and an attractive choice for many non-member golfers	a. Develop plans, based on Member input, for a multi-use Community Center facility, including a pro shop, restaurant, exercise facility, meeting rooms and social hall on LMOA property adjacent to the 18 <sup>th</sup> hole of the golf course and the existing pro shop and Eagle's Nest. As an alternative, undertake major repairs to the existing building.
	b. Continue improvements to the golf course.
	c. Study the financial and safety impact of allowing personal golf carts on the course and community roads; implement, if deemed feasible and desirable.
2.4. Provide a marina facility and services, boat slips and storage that are consistent with our Vision	a. Construct a new marina facility at the earliest possible date.
	b. Provide boat rental service for Member use.
	c. Provide convenient and secure in-season and off-season boat and RV storage facilities.
	d. Provide additional auto parking, improve driveway and drainage at the Marina.
	e. Provide picnic facilities at the marina, in a park-like setting.
2.5. Selectively add new recreational and social amenities, based on our Vision and Member input	a. Explore the possibility of having a well-equipped workout room at the Main Clubhouse.
	b. Explore the possibility of having an adult lap pool facility.
	c. Explore means for providing lower-cost broadband Internet service for all residents.



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<b>3. Safety and General Welfare</b>	Safety and general welfare of residents, staff and visitors
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
3.1. Provide a public safety unit that is highly responsive to the needs of the Association and its Members	a. Maintain a professional Lake Monticello Police Department that works in cooperation with the Fluvanna County Sheriff's Office to ensure the security and general welfare of the community and its residents. <b>ONGOING.</b>
	b. Coordinate with Fluvanna County Officials to reduce the cost of Police and Security Services provided by LMOA for the community and surrounding areas. <b>ONGOING.</b>
3.2. Provide physical security facilities, including entry gates, which are well maintained and enhanced to meet the needs of the community	a. Improve the fire escape for the upper floor of the main clubhouse.
	b. Review and evaluate current gate technology. Upgrade as appropriate.
	c. Determine whether residents in un-gated areas desire automated gates. If there is sufficient support, devise system for visitor access and install gates where they are desired.
	d. Determine whether there are steps that can be taken to improve the safety of walkers and bikers on LMOA roads.
	e. Conduct a thorough study of ways to improve the safety of the Tufton gate entry and exit to Route 53 and implement recommendations. <b>COMPLETE as of May 2010.</b> Create a new entrance gate (Lafayette).
3.3. Prepare for and respond to community emergencies in a timely and effective manner	a. Implement a comprehensive and up-to-date emergency response plan; implement a multi-layered emergency warning system, including a low-power FM radio station; conduct periodic drills.
	b. Install emergency lighting at all public facilities.
3.4. Support effective fire, rescue squad, and water rescue services that are responsive to the needs of our community	a. Annually, provide direct financial support to LMVF&R. <b>ONGOING.</b>
	b. Provide incentives to encourage volunteerism and private donations that support LMVF&R.
	c. Work with LMVF&R to improve ISO rating, which would result in better protection and lower homeowner's insurance costs for a large majority of LMOA Members.



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<b>3. Safety and General Welfare</b>	Safety and general welfare of residents, staff and visitors
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
3.5. Provide for responsive and cost effective removal of trash, recyclables, leaves, snow and other debris in an environmentally sound manner	<ul style="list-style-type: none"> <li>a. Expand the Improved Property Fee to cover all trash and debris pick-up, including street-side pick-up of unbagged leaves.</li> <li>b. Implement community composting program.</li> </ul>
3.6. Develop and implement an effective wildlife management plan	a. Implement near-term reduction in size of deer herd and manage herd size on a continuing basis.
	b. Continue research and education of the community regarding deer repellants, deer resistant plants and the prohibition regarding feeding the deer.
	c. Enhance and continue use of Wildlife Incidence Report process.
	d. Improve LMOA rules on deer fencing.
3.7. Improve general welfare of residents	a. Continue to conduct periodic e-coli, hydrilla, sediment and other testing of lake water quality.
	b. Provide lifeguards at the Main Beach.
	c. Remount mailboxes at a safe distance from roads.
	d. Consider the appeal, benefits and cost of installing street lights at major intersections; implement, if warranted.
	e. Encourage action to minimize the odors from the sewage processing plant.
	f. Implement boat operation and lake safety procedures; enforce rules in an effective manner.
	g. Prohibit the use of wake enhancers and wake enhancing tactics on the lake.



## Objectives and Action Steps

Strategic Focus	Strategic Goal
<b>4. Assets and Resources</b>	Acquisition and effective management of LMOA assets and resources
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
4.1. Prudently manage the Association's finances and reserves	a. Implement investment policy designed increase yield and preserve purchasing power of the investment corpus. <b>COMPLETE as of May 2010.</b>
	b. Optimize LMOA cash flow to maximize short-term earnings.
	c. Improve transparency in the budgeting and financial reporting.
	d. Develop strategic approach to fund major expenditures.
	e. Retain a portion of current investment income and dues income to accumulate prudent financial reserves.
4.2. Provide an infrastructure of roads that is consistent with our Vision	a. Establish a plan and funding stream for future road maintenance and paving.
	b. Repair roads and culverts promptly, to maximize the life of existing surfaces.
4.3. Provide an infrastructure of LMOA operational facilities required to achieve our Vision	a. Develop a Strategic Plan for Facilities to guide the renovation or replacement of existing facilities and building new facilities.
	b. Provide near-term funding for the redevelopment of the marina property including the building and the surrounding area, also providing for boat storage, parking, picnic area, and perhaps walking paths.
	c. Develop a plan for renovation and future use of the present clubhouse and other facilities considering need for present and future office space.
	d. Develop a plan for replacement of the present Golf Pro Shop/Eagles Nest structure.
4.4. Provide the staff necessary to achieve our Vision, with consideration given to options like outsourcing, contracting, and Member volunteers	a. Ensure that staff compensation reflects the current local labor market.
	b. Prepare and maintain a projection of future staffing needs. Ensure that the staff size, expertise and training are consistent with the requirements. Emphasize up-to-date technology on the web and elsewhere.
	c. Hire a full-time coordinator for social, recreational and learning programs.
	d. Evaluate the current committee structure, utilization and reporting relationships; implement changes to improve effectiveness.
	e. Determine what services that we might obtain from the County that we are not now receiving.



## Objectives and Action Steps

Strategic Focus	Strategic Goal
<b>4. Assets and Resources</b>	Acquisition and effective management of LMOA assets and resources
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
4.5. Sustain workforce excellence and encourage an Association-wide service culture that is responsive to the needs and expectations of LMOA Members	a. Conduct a rigorous review of current business practices and implement changes in business processes, technology and training to improve service levels and efficiency.
	b. Improve the quality and timeliness of data available to decision-makers and the Members.
4.6. Acquire sufficient financial resources through traditional and non-traditional means to achieve our Vision	a. Ensure that the Member dues and fees provide the funding necessary to meet our Vision.
	b. Seek 'sponsorship' funding for LMOA TV channels and special events; aggressively pursue paid advertising in LMOA publications and website.
	c. Identify, build and operate facilities/amenities that provide a positive cash flow which can be used to offset other expenses.
	d. Investigate the possibility of establishing "Special Tax Districts" for major projects or activities, wherein monies paid would be tax deductible to the Member.
	e. Establish a 501(C)(3) foundation to solicit and manage tax-deductible gifts to fund qualified projects of benefit to the community.
	f. Pursue grants aggressively.
4.7. Develop long-range strategies for effective utilization or disposition of LMOA land resources	a. Complete the exchange of Association-owned property on the Rivanna River for County-owned property adjacent to the 'campground' property.
	b. Develop plans for utilization of the Association-owned property located along the pond on the 18th hole of the golf course.
	c. Take advantage of opportunities to acquire strategically important properties as they become available. <b>ONGOING.</b>
4.8. Improve the health of the watershed that feeds into Lake Monticello	a. Ensure that our rules regarding stormwater management are appropriate and are enforced.
	b. Press the County to enforce watershed management rules on all properties that drain into the Lake Monticello community.



## Objectives and Action Steps

Strategic Focus	Strategic Goal
<b>5. Communications</b>	Active and open dialogue among Members, residents, leaders, staff and the community at large
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
5.1. Increase awareness of the role and purpose of our Association	a. Display Vision and Mission Statements in prominent locations throughout the community; publish and distribute a brochure defining the role and purpose of the Association.
	b. Develop an expanded standardized weekly programming TV broadcast schedule; include Member comments session in the schedule.
	c. Publish an enhanced LM News on a monthly basis.
	d. Expand children awareness programs related to LMOA issues.
5.2. Inform LMOA Members of relevant internal and external issues and activities	a. Continue to use the Friday Flyer, announcements at Board meetings and Channel 10 to alert Members to critical external issues that may affect our community and its residents.
	b. Invite County and business officials to the monthly Board meeting agenda on a regular basis to cover topics of interest to the membership.
	c. Add links on the LMOA website to relevant external agencies.
	d. Implement means of including cable content on satellite TV and/or internet services.
5.3. Encourage and engage in dialogue between Members, LMOA Board of Directors, committees and staff	a. Make greater use of the Internet and telephone to inform residents and obtain their feedback.
	b. Conduct quarterly "coffee hours" at times convenient to Members to interact with other members, staff and Board and Committee members to exchange information related to LMOA issues and activities.
	c. Create Focus Groups to determine interests and concerns of LMOA Members.
	d. Encourage the formation of community action groups in each section to foster increased communication and membership participation.
	e. Utilize a low-power LMOA radio station to improve general communications with residents.
5.4. Increase Member participation in all aspects of LMOA governance	a. Conduct surveys and interviews of present and past Board members, committee members and staff to gain insight into issues and enhancements relative to LMOA governance; implement changes as appropriate.
	b. Conduct an annual recognition night for staff and volunteers.
	c. Establish a part time staff or contract Volunteer Recruitment Officer position.
	d. Conduct a cost/benefit analysis of offering LMOA discounts to Members who vote in the annual election, participate on LMOA committees and other volunteer efforts.



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Strategic Focus	Strategic Goal
<b>5. Communications</b>	Active and open dialogue among Members, residents, leaders, staff and the community at large
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
5.5. Strengthen relationships with external interest groups, political jurisdictions, utility providers, developers, commercial entities, and other organizations and actively represent the community's interests	a. Appoint "official " liaisons with with Fluvanna County Board of Supervisors and Planning Commission.
	b. Establish a Fluvanna County news broadcast as a regular feature on Channel 10.
	c. Conduct biannual information exchange meetings with real estate companies, developers and business owners in the area.
	d. Promote Member participation in Fluvanna County activities.
5.6. Promote and foster community identity and expand local, regional, and national recognition of Lake Monticello	a. Compete for external awards in "community excellence" as a means to gain recognition and validation that the Association is achieving its Vision.
	b. Submit articles about LMOA and living at Lake Monticello to external publications.



## Objectives and Action Steps

Strategic Focus	Strategic Goal
<b>6. Learning</b>	Facilitation of learning opportunities for residents of all ages
Objectives to Achieve Strategic Goal	Action Steps to Achieve Objectives
6.1. Facilitate learning opportunities provided by external agencies and organizations in the region for the convenience of LMOA residents	a. Establish an LMOA working group to provide focus on achieving the Learning goal, determine wants and needs, gather information and publicize opportunities.
	b. Implement lecture series featuring external speakers.
	c. Engage institutions of higher education by providing internships, research projects related to LMOA issues and projects.
	d. Encourage and facilitate appropriate institutions to provide college and adult education classes on-site at Lake Monticello.
6.2. Encourage and support LMOA Member volunteers who may wish to develop and deliver talks, seminars, field trips and publications	a. Conduct survey of Members to determine their areas of interest and special knowledge they would be willing to share with others.
	b. Survey parents of school-age children to determine what kind of enrichment programs they would like to see for their children; implement programs, as appropriate.
	c. Create and maintain a resource list of learning sources, schedules and contact information organized by topic area.
	d. Explore alternative delivery techniques such as interactive Channel 10.
	e. Explore ways to increase the number of classroom facilities at the lake.

