

LMOA Strategic Plan

Report of Working Group
September 2007

Strategic Plan Outline

- Vision
- Mission
- Strategic Goals
- Objectives to Achieve Goals
- Action Steps to Implement Objectives

Plan Durability

- Vision (permanent)
- Mission (permanent)
- Strategic Goals (rarely change, few in number)
- Objectives to Achieve Goals (durable, reviewed annually)
- Action Steps to Implement Objectives (modified annually; may be multi-year)

Vision

Lake Monticello is a private, gated, residential community with a diverse population of working and retired families and individuals. The Lake Monticello community achieves the highest standards in Fluvanna County as 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 through active participation, service, outstanding leadership, and the acquisition and faithful stewardship of financial resources that are consistent with achieving our vision.

Strategic Goals

1. Communications – To effectively communicate with LMOA membership and the greater community.
2. Resources – To effectively acquire and manage LMOA assets and resources.
3. Covenants, Restrictions and Reservations – To ensure maintenance, preservation, and revitalization of all properties to protect and enhance property values and the beauty of the Lake Monticello community.
4. The Lake, other Recreational and Social Amenities, and the Environment – To provide exceptionally well-maintained amenities in an environment that is consistent with the LMOA vision of excellence.
5. Safety and General Welfare – To provide measures that enhance the safety and general welfare of LMOA residents, staff, and visitors.
6. Learning – To provide opportunities for LMOA residents of all ages to engage in learning activities.

Strategic Goal #1

To effectively communicate with LMOA membership and the greater community.

1. Communications

- *All forms of communications, including broadcast and print*
- *Relationships and participation with external entities*
- *Measures to increase member participation*
- *Measures to promote and foster community identity*

Strategic Goal #2

To effectively acquire and manage LMOA assets and resources.

2. Resources

- *Infrastructure of roads, operational facilities and staff*
- *Acquisition of sufficient financial resources by traditional and non-traditional means and management of those resources*

Strategic Goal #3

To ensure maintenance, preservation, and revitalization of all properties to protect and enhance property values and the beauty of the Lake Monticello community.

3. Covenants, Restrictions and Reservations

- Member Awareness
- Revisions
- Enforcement

Strategic Goal #4

To provide exceptionally well-maintained amenities in an environment that is consistent with the LMOA vision of excellence.

4. Amenities and Environment

- *Lake preservation*
- *Existing and new social and recreational amenities*
- *Environmental and wildlife management*

Strategic Goal #5

To provide measures that enhance the safety and general welfare of LMOA residents, staff, and visitors.

5. Safety and General Welfare

- *Public safety unit*
- *Physical security measures*
- *Support to LM Fire & Rescue*
- *Emergency Management*
- *Trash, leaf, and debris removal*

Strategic Goal #6

To provide opportunities for LMOA residents of all ages to engage in learning activities.

6. Learning

- *Promotion of externally available opportunities*
- *Encouragement of local volunteers*

Where Do We Go From Here?

- Confirm acceptability of Vision, Mission, and Strategic Goals
- Develop Objectives necessary to achieve the Strategic Goals
- Transform content of the Master Plan into Action Steps to achieve the Objectives

Keys to Success

- A structured planning methodology
- Constituency input
 - LMOA Members
 - Committees
 - Staff
 - Board of Directors
- Openness throughout the process

We Need Your Input

- Contact Points
 - Board of Directors
 - Al Colville
 - Ed Seroskie
 - Chuck Johnson
 - Planning Committee
 - Leroy McCampbell
 - Denny Avers