

CAPMANAGEMENT

Page One – Vision, Mission, Strategies
Last Updated: 12/01/2017

SAMPLE HOA

Our Vision	Provide our HOAs with proactive management solutions.
Business Maturity Picture & Date	

Our Mission	Teamwork, Service, Innovation
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Our Strategies (how do we a) lead and b) carrying out our mission? Focus on improving property

1	Weekly reporting from management to boards of directors
2	Maintain strategic plans with monthly reviews and updates
3	Maintain an association calendar with monthly review and updates
4	Provide monthly board packet the Friday before every board meeting
5	Provide support and transparency to homeowners
6	Maintain communications with owners via HOA website
7	Maintain a weekly maintenance tracking document
8	Respond to owner concerns within 24 hours
9	Cooperate with and respond to board representatives
10	Seek out proactive solutions to HOA challenges

CAPMANAGEMENT

12 MONTH OBJECTIVES December 1st, 2017 to December 1st, 2018

Which Pg 1 Strategy does each Objective below measure? Fill in that Strategy Number(s) to left of letters below.

	A	HOA Insurance Renewals	
	B	Complete FHA Certification	
	C	Explore new landscaping vendors next seasons	
	D	Implement new building management software programs	
	E	Develop new process maps for board member turnover before next election	
	F	Reserve Study review for 2018	
	G	Elevator upgrades	
	H	Domestic water line replacement	
	I	Asphalt replacement	
	J	Retaining wall refurbishments	
	K	2017 Tax filings	

3 MONTH OBJECTIVES

What to do this quarter to complete above 12 month Objectives

Which Objective above does each Action below fulfill? Fill in that Objective Letter to left of Action Numbers below.

Jan. 2018 – March 2018 (for example)		Owner	Due Date
	1	Schedule 2018 meetings	
	2	Prioritize 2018 maintenance projects	
	3	Parking lot lighting project complete	
	4	Signing of new management contract	
	5	Finalize HOA Budget	
	6	Completion of comprehensive balcony repairs	
	7	Make up air unit follow up	
	8	Pet waste station installation	
	9	Explore ways to increase online homeowner engagement	
	10	Swimming pool repair	

THIS MONTH'S ACTIONS

What to do this month to complete above Quarterly Action Plans

Which Actions above does each Action below fulfill? Fill in that Quarterly Letter to left of Monthly Numbers below.

December 2017		Owner	Due Date
1	A	Finalize Gutter Cleaning	
	B	Complete west parking lot fence repairs / coordinate with vendor	
	C	Gather tree proposals	
	D	Completion of painting projects	
	E	Winterize sprinkler system	
	F	Complete installation of storm doors on storage units	

Have "SMART" Actions - Specific, Measurable, Achievable, Relevant/Results-Oriented, Timed