



2030 SROA STRATEGIC PLAN

Guiding Principles, Goals, Policies & Actions





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Plan accepted by the SROA Board of Directors on September 21, 2024

I. INTRODUCTORY MESSAGE – BOARD PRESIDENT

Greetings Sunriver Owners and Community Partners:

This Strategic Plan is the product of the creativity and effort of a group of 32 individuals, representing all aspects of our community, who invested multiple hours of their time over the past year. Let me first express my deepest appreciation to all who contributed to this important document, and more importantly, their ideas expressed within.

Sunriver is a unique community which has maintained its desirability since 1968 as the Pacific Northwest's premier vacation spot as well as home for nearly 2,000 full-time residents. This has only been possible through the dedication of owners, investors, community businesses and professional service organizations like Sunriver Service District and Sunriver Owners Association. Working together, these Sunriver stakeholders have kept our community economically vibrant, attractive and safe. Sunriver is a place where a first-time visitor introduces their family and friends to the magic of Sunriver, which is then passed on to subsequent generations. Those of us who live and recreate in Sunriver today, owe a deep sense of gratitude to those who developed and maintained the unique beauty, tranquility and recreational opportunity that is Sunriver today.

This Strategic Plan is our opportunity to pass on to future owners, visitors and residents, our vision for Sunriver. The owners, staff, businesses and service providers who wrote this plan have created a road map for current and future decision makers as a guide for keeping Sunriver as the premier Northwest residential community and destination resort.

I encourage all owners, and most importantly all Sunriver decision makers, to read through this document, think about the intent behind each of the guiding principles, goals, policies and action items and use these recommendations to guide their decisions impacting the future of Sunriver. Our legacy, as current stewards of this unique place, will be determined by how well we achieve the intent of our mission statement:

“Maintaining and enhancing Sunriver as a premier residential and resort community, protecting its natural environment, vibrant quality of life, property values and overall economic vitality.”

–Gerhard Beenen, Sunriver Owners Association Board President



II. EXECUTIVE SUMMARY

In August 2023, the SROA Board of Directors created a task force to prepare a Strategic Plan that would guide community direction and decision making for a 5 to 7 year period. As part of such creation, the task force was charged with specific direction by the Board, a summary of which includes a community prepared and supported document that identifies core values and is implementable through identification of desired actions.

The SROA 2030 Strategic Plan, herein titled as “Plan,” will assist the SROA Board and staff in goal setting, work plan development and budgeting. Moreover, and most importantly, the Plan strives to provide a framework for such decision making that reflects the wishes of its members for their community – a community that serves permanent residents, part-time residents and absentee owners, as well as visitors and guests. All of these groups have a vested interest in the short and long-term success and vibrancy of Sunriver. In order to be as comprehensive and inclusive as possible, the task force membership included a broad representation of these owner groups, as well as other community partners that have a great degree of influence in the character and livability of Sunriver. The goal was to have many voices and perspectives participate in the development of the Plan so that it can truly be called a community vision and directive to action.

In order to inform and educate the task force on the current status, function and direction of SROA, the members were provided with a recent history of SROA governance, including relevant documents, master plans, results of the 2024 comprehensive owners survey and overall operational structure of SROA. With a basis of knowledge from which to begin their work, the task force started at what could be considered the beginning by discussing the overall Guiding Mission statement for SROA. After discussion, the task force believed that the overall premise of the existing Mission Statement was sound, but included some minor changes to reflect the current and future direction for the community that they believed was suitable, that being:

“Maintaining and enhancing Sunriver as a premier residential and resort community, protecting its natural environment, vibrant quality of life, property values and overall economic vitality.”

By using the guiding Mission Statement as a point of beginning, the task force soon developed four Guiding Principles from which subsets of Goals, implementing Polices and specific prioritized Action Items were recommended. Again, the overall goal was to drill down from a broad vision to tangible, result driven guidance to the SROA Board of Directors on multiple fronts.

It is understood that not every owner or community partner will completely agree with all elements of the Plan. That is human nature based on individual desires and interests. However, as described above and herein, the Board direction in the preparation of this Plan and the process that unfolded included many community perspectives and opportunities for owner input, including a virtual forum where questions were asked and answers were provided, as well as a multi-week opportunity for owner review and comment. During the process, updates on the progress of the project were provided at every Board meeting and articles were included in the monthly Scene. Ultimately, following this community process, the Plan was finalized and presented to the SROA Board for adoption. Now that the Plan is in place, it will serve as the primary guide for SROA direction over the next 5 to 7 years, with an intent for revision over time. On an annual basis this Plan will be utilized, along with Board of Directors and staff input, to create yearly work plans that help develop the annual budget.

III. PURPOSE, HISTORY & GUIDING DOCUMENTS

PURPOSE:

To develop a community-wide strategic plan that SROA can utilize as a responsible guidebook with disciplined effort to produce fundamental decisions and actions that shape and guide what the Sunriver community and SROA embodies. The Plan enables SROA to be prepared strategically and financially in order to meet its obligations and fiduciary responsibilities over the next 5 to 7 years, and to do so with the intent of meeting the needs of the owners, visitors and the Association.

Foremost to the past and future livability of Sunriver, is to retain the integrity of blending the developed areas with the natural elements of the community – and to protect and enhance such. These factors, including evolving demographic diversity (of owners and visitors alike), were considered throughout the strategic planning process in order to continue enhancing the quality of life, retaining the natural environment, and preserving the economic viability of the community.

When reading this Strategic Plan and reviewing the suggested implementable action items that bring it to fruition, it is important to remember that this is a multi-year Plan that will continue to be influenced by unforeseen factors (e.g., a global pandemic). Priorities have been established, but the Plan must also be adaptable. It should be thought of more as a road map than a recipe. There may be multiple paths to take to get to the destination as opposed to the elements herein being prescriptive in nature.

HISTORY:

The planning, development and governance history of Sunriver includes the vision of a residential/resort community that reflects the importance of the natural setting in which it is located while also providing a variety of housing types and recreational amenities for various demographic classes. The underlying tie throughout the community was the promotion of design that coincided with the environment.

The original development corporation managed the new community until such time as the responsibility was turned over to the owner's association (SROA). SROA now provides governance to ensure that the intent of the original development is retained and fulfilled as the community continues maturing over time. This includes the management of common areas as well as providing amenities and services in a manner that balances development with the natural environment that was the original inspiration for Sunriver. However, as the Sunriver community and Central Oregon region continue to grow, there are many more influences that SROA must consider and coordinate with. These include increasing rules and the necessity for relationships with other stakeholders (such as governmental agencies) that add to the complexity of daily governance for SROA.

Notwithstanding the current complexities, Sunriver/SROA continues to rely on the input and governance by the owners themselves through a volunteer Board of Directors and associated committees who work with a professional staff to implement the governing documents that provide the basis for formal governance. The continual pulse of the community (owners) is taken into account through owner surveys, public forums, opportunities for volunteerism, regular elections and projects such as the creation of this Plan.

PURPOSE, HISTORY & GUIDING DOCUMENTS

The SROA Vision 2020 document that is included under Guiding Documents was developed in 2012 and was relevant to the anticipated growth, expected changes and community direction at that time. Over the past 12 years since that document was developed, there have been numerous changes that have affected how the community operates today and into the future.

These include: the increasing prevalence of fire/smoke in the region; continual population growth in Central Oregon; the development of similar but competing planned communities in the region; increasing property values and home prices; increasing prices of recreational amenities and opportunities available to owners and visitors through community partners; an evolving and aging demographic within Sunriver; a broadening of desired recreational amenities; the effects of the “work from home” population in the community; and the influences and opportunities afforded through social media. The emergence of these factors, although fairly recent (since the creation of the SROA Vision 2020 in 2012), are part of the history of Sunriver. Many owners and visitors are keenly aware of these factors as they have affected nearly all in some manner.

Thus, these factors were accounted for in the development of this forward-thinking Strategic Plan. One of the primary means of addressing these issues herein is the emphasis on two-way communication between owners/visitors and SROA, as well as with and between community partners.



GUIDING DOCUMENTS:

Although the 50+ year history has seen many consistencies in the governance of Sunriver (through the Articles of Incorporation, Bylaws and Consolidated Plan – all available for review on the SROA website), the updating, amending and development of new guiding provisions has been continual in order to keep the community desirable, livable and relevant.

The following projects and documents were used to guide various aspects of SROA governance, development and overall operations over the past five years. These were instrumental in providing the task force with an educated basis from which they could begin their involvement in this project.

These documents are referred to as the building blocks for the Strategic Plan:

- Vision 2020
- Infrastructure & Amenities Master Plan (IAMP) Task Force (2017 & 2021)
- Recycling Center Task Force
- Telecommunications Task Force
- Member Pool Construction
- Rules Awareness & Compliance Task Force
- COVID-19 Task Force
- Ladder Fuels Reduction Plan
- Pathway Master Plan
- Information Technology Strategic Plan Task Force
- Parks & Facilities Master Plan Task Force
- Design Manual Re-write Task Force
- Comprehensive Owner Surveys (every 3 years, last spring 2024)
- Capital Reserve Study

IV. MISSION STATEMENT

A vital key to many institutions, including a residential and resort community such as Sunriver, is the development of a Mission Statement.

This has, is and will continue to be true for the community of Sunriver through its management by the Sunriver Owners Association, as well as the work by community volunteers and partnerships with community organizations.

From a broad, generic perspective, a Mission Statement is a distinct statement that explains an organization's purpose, what it does, who it serves, and is inclusive of the principles and goals deemed important. A Mission Statement is important because it communicates the passion and vision of the organization to its many stakeholders. It provides an instantaneous snapshot of the overarching desires of the community or organization being served or providing such service. Ultimately, a Mission Statement provides a basis for the responsibility accepted by the organization and its primary reason for existing.

SROA has had a guiding Mission Statement since the 1980s. The mission statement has served Sunriver well during the on-going development and build-out of residential, commercial and resort areas – but the community has changed much over the past 30-40 years.

The previous Mission Statement was:

“Maintaining Sunriver as a premier residential and resort community, protecting and enhancing its quality of life, natural environment and property values.”

Now that Sunriver's developable land area is at 99% buildout, the basis for the previous Mission Statement is still relevant, but the focus has been shifted to reflect the needs of the community in the future. Thus, enhancing the community was deemed important.

Additionally, a look at the foundational roots in the development of Sunriver with respect to the reason so many people continue to live and recreate here resulted in the natural environment jumping to the forefront in the mission.

Also, there is a recognition that Sunriver has a vibrant quality of life that is important to all owners and visitors. Lastly, economic vitality, with an emphasis on property values and the success of the commercial and resort businesses, was deemed an important factor in continuing the viability of the community.

The new Mission Statement is:

“Maintaining and enhancing Sunriver as a premier residential and resort community, protecting its natural environment, vibrant quality of life, property values and overall economic vitality.”

The updated Mission Statement was instrumental in providing direction for developing the four Guiding Principles included herein that define what the community deems important for the term of this Plan and beyond.



V. GUIDING PRINCIPLES

Key in fulfilling the Mission Statement are the Guiding Principles for the community.

Guiding Principles prioritize the important values that the community embodies – brought to fruition by SROA volunteers and staff. Defined Guiding Principles establish a basis for decision making by administrative bodies (such as the Board of Directors), committees and staff. The Guiding Principles establish the culture that the community deems important for long-term sustainability of Sunriver according to the priorities of the owners, residents and visitors.

The Guiding Principles are:

- Excellence in Governance
- Environmental Stewardship
- Quality of Life/Sunriver Experience
- Community Engagement

Although the Guiding Principles are very short statements as included herein, they are powerful in their intent to guide Sunriver in meeting the multiple (sometimes competing) interests and evolving societal changes that influence the overall development and livability of the community.

VI. GOALS & POLICIES

Goals and Policies are the instruments that guide the means to achieve the broad objectives of the Mission Statement and Guiding Principles. The Policies provide actionable recommendations to SROA.

The Goals and Policies developed under each Guiding Principle start on page 11.

VII. ACTION ITEMS & PRIORITIZATION

Action items are the elements of the Plan “where the rubber meets the road.” As is inherent in their title, “action items” contemplate and direct specific projects to a discernible intent and desired result.

SROA is/has been consistently performing some of the items listed, but the task force determined that they were important to include in the list as the continuance or enhancement thereof are vital to the community.

Although this Plan is one that lists and prioritizes some specific actions by SROA, it is inherent that many of the action items require the interaction with and participation of community partners – with SROA coordinating with such partners to ensure the most efficient and productive provision of the work necessary to complete the action.

Prioritized Action Items

As previously described, when developing the Plan, the task force listed many action items that are important to our community. However, in order to be realistic in what can be achieved and what will have the most deliberative effects to fulfill and meet the Mission Statement, Guiding Principles, Goals and Policies, a prioritization of all identified action items was necessary. This prioritization allows the SROA Board and staff the ability to include the projects in their yearly work plans and account for the necessary staffing and budget.

It should be noted that although these action items are prioritized, there is inherent flexibility necessary in bringing these to fruition in the designated time frame (5 to 7 years) – again, this is based on coordination with partners, budget availability/constraints, available staff, etc. As stated previously in this document, this Plan should be thought of more as a road map with multiple routes to get to the same place rather than a prescriptive recipe that must be followed without deviation.

Additionally, for those Action Items included within the larger list in Appendix A and not included in the prioritized items to follow, they are not deemed unimportant. Rather, they are important to the community and will be reviewed for their relevance as work and budgetary plans are developed each year and conditions in the community evolve.

Additional (Potential) Action Items

As the four subgroups of the task force proceeded through development of Goals and Policies, the dive into specific action items was always inherent in the discussions.

The initial work resulted in identifying more than 100 additional (potential) Action Items to those prioritized Action Items listed in this document – such a large number that it would be a challenge to accomplish all in the established 5 to 7 year time frame. The additional Action Items will be considered on an annual basis based on relevance at the time but may or may not come to fruition. In this vein though, some of the action items were tasks that were already being implemented (such as the on-going work for rule enforcement, ladder fuel reduction efforts and the provision of cost-effective and efficient services).

Nonetheless, these items were retained on the overall action item list as continuance of such was deemed vital for the community (the ongoing Action Items are identified in the complete list of potential Action Items in Appendix A). Additionally, there was some overlap in action items developed under multiple Guiding Principles, Goals and Policies.

This overlap though was determined to be key in emphasizing the importance of such Action Items to the community. Thus, some of the Action Items are very similar to one another, but with subtle differences depending upon which Guiding Principle, Goal or Policy it addresses. As stated above, a complete list of all potential Action Items is included in Appendix A.



Guiding Principles of the 2030 Strategic Plan:

EXCELLENCE IN GOVERNANCE... pages 11-13



QUALITY OF LIFE/SUNRIVER EXPERIENCE... pages 14-15



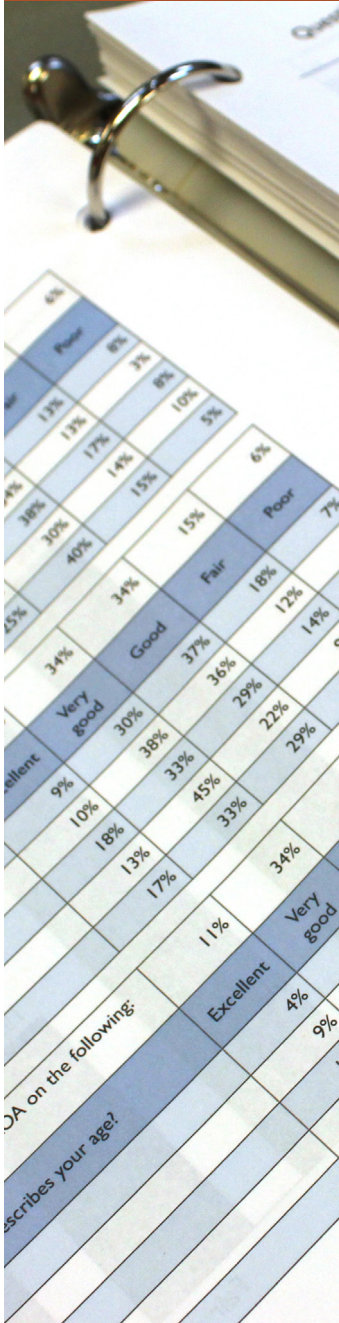
COMMUNITY ENGAGEMENT... page 16



ENVIRONMENTAL STEWARDSHIP... page 17



EXCELLENCE IN GOVERNANCE



✓ BEST PRACTICES IN GOVERNANCE

GOAL: SROA shall employ current best practices in its governance of Sunriver, including developing and enforcing policies and standards for the community.

POLICIES:

- The SROA Board of Directors shall conduct a yearly goal setting session utilizing the Strategic Plan to help establish the annual budget and associated work plans.
- SROA shall maintain a Strategic Plan – the Plan shall be updated on a regular basis (approximately every 5-7 years) to ensure relevancy.
- SROA shall evaluate the practices of owners associations in comparable communities and shall consider whether it is utilizing current best practices for owners associations of its kind, including by setting policies, ensuring compliance with those policies, and upholding community standards.
- SROA shall evaluate opportunities (grants, etc.) as they present themselves.
- SROA shall maintain resilience in its ability to respond to unforeseen events.

✓ FISCAL RESPONSIBILITY

GOAL: SROA shall build and maintain trust, demonstrate ethical conduct, and ensure excellent governance by being transparent and accountable to stakeholders, including owners, partners and visitors.

POLICIES:

- SROA shall practice fiscal responsibility in all aspects of its operations, including careful scrutiny of expenditures, adherence to established budgets, and compliance with federal and state laws and generally accepted accounting principles (GAAP).
- SROA shall abide by all procedures and controls in the SROA Financial Policies to minimize risk management losses.
- SROA shall support the interests of all owners in decisions regarding short-term and long-term infrastructure and amenity spending.
- SROA will be transparent to owners regarding income and spending decisions.

✓ ECONOMIC VITALITY

GOAL: SROA shall maintain and enhance the economic vitality of Sunriver.

POLICIES:

- SROA shall protect owner investments and property values in Sunriver.
- SROA shall strive to maintain and enhance the Sunriver brand as a premium residential and resort community for today and for the future.
- SROA shall collaborate and coordinate with stakeholders.

✓ TRANSPARENCY & ACCOUNTABILITY

GOAL: SROA shall build and maintain trust, demonstrate ethical conduct, and ensure excellent governance by being transparent and accountable to stakeholders, including owners, partners and visitors.

POLICY:

- SROA shall be transparent and accountable ensuring its operations, including governance, policies and procedures, financial management and condition, and decision-making processes are communicated and open to all stakeholders.

EXCELLENCE IN GOVERNANCE

✓ OWNER INPUT & REPRESENTATION

GOAL: SROA shall fairly represent the interests of all Sunriver owners and owner input shall be actively sought out and considered in SROA's decision-making process.

POLICIES:

- SROA shall identify and analyze demographics and changes among owners on a continuing basis.
- SROA shall identify, maintain and expand upon existing and future opportunities for owner input and utilize that input to drive fact-based decision making in the best interests of owners as a whole.
- SROA shall solicit and/or develop increased and balanced owner participation, reduce barriers to participation, and diversify participation based on current and trending owner demographics, in an effort to increase volunteerism and expand participation of second home residents and short-term rental property owners.
- SROA shall consider and analyze metrics that reflect owner interests, preferences and concerns, including surveys, owner forums, master plans, task force studies, and recommendations.

✓ COORDINATION WITH COMMUNITY PARTNERS

GOAL: SROA shall ensure effective coordination and joint action with regional partners critical to enhancing security, resiliency, recreational amenities and quality of life in Sunriver.

POLICY:

- SROA shall optimize coordination and take joint action with key regional partners critical to Sunriver including identification of areas where goals and activities of regional partners intersect with those of Sunriver
 - positively and negatively – both now and in the future.

✓ EMERGENCY PREPAREDNESS

GOAL: SROA shall evaluate and widely communicate effective policies and procedures for the safety of Sunriver community in response to, and evacuation from, the threats and hazards that pose the greatest risks.

POLICY:

- SROA shall coordinate emergency preparedness with the Sunriver Service District (fire, police), Public Works, the Sunriver Airport, Deschutes County, and other relevant organizations and agencies to ensure emergency plans are in place and evaluated. The Sunriver Service District along with SROA shall educate owners and visitors on such emergency preparedness.

✓ PROTECTION FROM WILDFIRE

GOAL: SROA shall endeavor to reduce wildfire hazards on all lands within Sunriver and coordinate wildfire hazard reduction with the adjacent National Forest lands.

POLICIES:

- SROA shall maintain awareness of efforts of regional and statewide organizations and agencies relating to reducing wildfire risk.
- SROA shall routinely update and continue to implement the Ladder Fuels Reduction Plan within the boundary of Sunriver through an adopted compliance program.
- SROA shall coordinate wildfire protection plans with the Sunriver Service District (fire and police departments), Deschutes County, Project Wildfire, the U.S. Forest Service and Oregon Department of Forestry.
- SROA shall support owner and/or agency efforts for home hardening and community fire resiliency.

EXCELLENCE IN GOVERNANCE

PRIORITIZED ACTION ITEMS:

- Review and recommend a plan of action (including a budget, if necessary) for encouraging better owner compliance with rules and regulations, up to and including hiring an SROA compliance officer.
- Communicate to and educate stakeholders regarding SROA roles, capabilities, limitations and how SROA relates to other agencies in the management of Sunriver, including the Sunriver Service District, resort management, village management and Deschutes County.
- Evaluate how to optimize community partnerships, including identifying strong existing relationships with partners.
- Expand owner sign-up for emergency notifications; add additional coordination of resources to notify owners on a broader basis concerning service or emergency incidents in Sunriver; communicate plans/updates for emergency preparedness through appropriate websites, emergency notifications, and printed materials both for owners and property management companies to communicate to visitors.



QUALITY OF LIFE | SUNRIVER EXPERIENCE



✓ REINFORCE & ENHANCE THE “SUNRIVER EXPERIENCE”

GOAL: Reinforce and enhance the “Sunriver Experience” brand as an involved, relevant and thriving community for all owners, residents and guests.

POLICIES:

- Align the Sunriver “brand,” vision and objectives across all stakeholders (Village, Resort, SROA, SSD, SNCO and others).
- Residents foster a sense of community.
- Anticipate and work to minimize the potential negative impacts between increased full-time residents and visitors during peak season.
- Balance visitor and resident (full-time and part-time) needs and experiences.
- Preserve the serenity of the Sunriver lifestyle.

✓ PROTECT SUNRIVER’S ASSETS

GOAL: Proactively work to protect and enhance Sunriver’s physical and natural assets.

POLICIES:

- Ensure a consistently safe environment.
- Enhance pathway safety as a premier resident/visitor experience for the entire pathway system.
- Increased awareness and enhanced enforcement of rules & covenants for both visitors and property owners.
- Maintain existing and seek to enhance amenities consistent with Sunriver’s value proposition to owners.

✓ ENHANCE SUNRIVER’S YEAR-ROUND APPEAL

GOAL: In partnership with local businesses, enhance Sunriver’s year-round appeal and experience for owners, residents and guests.

POLICY:

- Increase Sunriver’s value to owners, residents and guests during “shoulder seasons.”

✓ ENSURE AWARENESS & EASY ACCESS TO INFORMATION

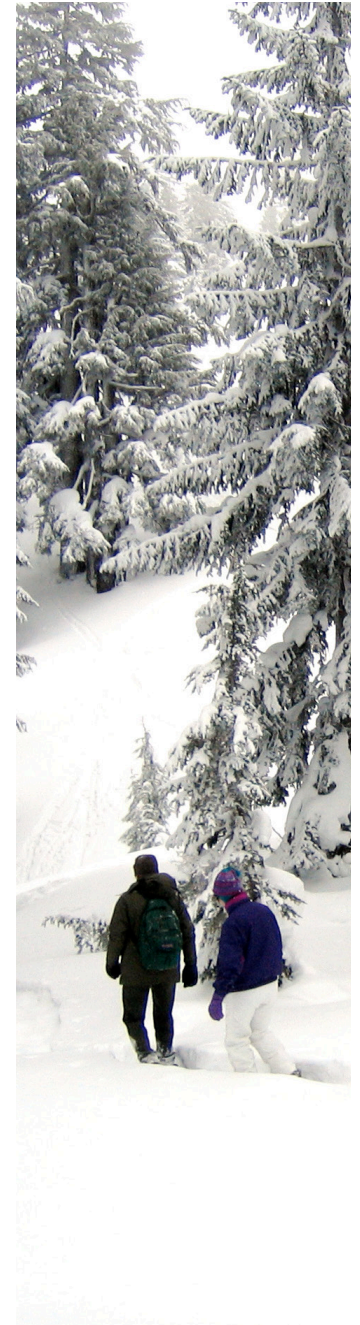
GOAL: Ensure broad awareness and easy access to key information for property owners and guests.

POLICIES:

- Distribute critical community information to reach the maximum audience based on need and value.
- Ensure a consistent and understandable Design Review process for owners, both in preparation for and during project construction.

PRIORITIZED ACTION ITEMS:

- Consider all users & abilities when constructing/updating facilities or amenities.
- Determine what is allowed on pathway and communicate effectively to all users & abilities.
- Broadly communicate and enforce Sunriver Rules & Regulations.
- Address infrastructure and amenity issues (e.g., cell phone coverage, lack of public parking, etc.).
- Ensure alignment between SROA financial investments and expectations for each SROA asset that impacts\ property owners and guests.
- Improve safety across all areas to protect owner and guest experiences.
- Maintain owner experience “year-round” – particularly during peak season crowding and off season. Key in on top issues/concerns & opportunities.
- Seek common and similar vision among community partners for Sunriver’s brand.
- Develop an effective tool, process and transparent communication vehicle to reach owners and guest(s) and provide all relevant information easily and in one place.
- Make the design review process more owner friendly, transparent and efficient.



COMMUNITY ENGAGEMENT



✓ RECOGNIZE IMPACT & IMPORTANCE OF VISITORS

GOAL: Recognizing the criticality of visitors to Sunriver, SROA shall seek to maintain and enhance excellence of guest experience.

POLICY:

- SROA shall work with owners to create a community that welcomes guests and enhances guest experience in Sunriver utilizing tools including communication, inclusiveness, interaction, amenities and activities.

✓ ENHANCE THE SENSE OF COMMUNITY IN SUNRIVER

GOAL: SROA shall seek to enhance the sense of community in Sunriver.

POLICY:

- SROA shall seek to engage owners in social and civic activities and events to foster a sense of a thriving, growing, and sustaining community.

✓ ENHANCE YEAR-ROUND APPEAL

GOAL: SROA shall assess opportunities to enhance year-round appeal of Sunriver for owners and guests.

POLICY:

- SROA shall seek to increase shoulder-season and winter appeal of Sunriver to augment economic vitality, including an increase in year-round residents and guests.

PRIORITIZED ACTION ITEMS:

- Continue to maintain and enhance SROA pathways as a key asset.
- Consider additional parking for visitors.
- Consider a shuttle around Sunriver and to Mt. Bachelor.
- Establish a Communications Work Group to effectively communicate and engage with owners and guests.
- Utilize and update SROA communication channels to promote Sunriver activities and facilities.
- Work with the Sunriver Area Chamber of Commerce to attract new businesses and engage new owners.
- SROA to create a sense of community uniting guests and owners by engaging with all types of diverse owners and visitors and maintaining a respectful, welcoming and inclusive environment.
- Engage new owners and endeavor to attract new generations by creating a “Welcome” Committee.
- Assess existing amenities, consider updating facilities, and seek to expand seasons for current facilities.
- Assess the feasibility of additional indoor/year-round facilities and new amenities for owners/guests.
- Coordinate with Sunriver area businesses and organizations to discuss the need for year-round activities.

ENVIRONMENTAL STEWARDSHIP



✓ MITIGATE WILDFIRE HAZARDS

GOAL: Proactively mitigate wildfire hazards and impact on the Sunriver community.

POLICIES:

- SROA shall acknowledge the importance of wildfire risk through compliance with Sunriver Rules & Regulations.
- SROA shall routinely assess and update its Ladder Fuels Reduction Plan, balancing the goal of preserving the natural environment with that of mitigating wildfire risk.
- SROA shall coordinate wildfire protection plans with the Sunriver Service District, Deschutes County, National Forest and Oregon Department of Forestry.
- SROA shall educate and prepare the community to respond to wildfire emergencies.
- SROA shall continue best practices for wildfire mitigation and maintain its status as a statewide “model” for wildfire protection.

✓ PRESERVE & PROTECT SUNRIVER’S ENVIRONMENT

GOAL: Preserve and protect Sunriver’s natural environment for future generations.

POLICIES:

- SROA shall protect the air, river, riverbanks, meadows, marshes, lakes, and flora and fauna within Sunriver.
- SROA shall actively manage the natural habitats in all open areas within Sunriver.
- SROA development guidelines shall ensure any development by SROA, owners and community partners minimizes the impact on the land and preserve broad vistas of the national forest and Cascade mountains.

✓ ENCOURAGE SUSTAINABLE PRACTICES

GOAL: Encourage environmentally sustainable practices throughout Sunriver.

POLICIES:

- SROA shall create and regularly update a sustainability and environmental impact policy for SROA practices and development.
- SROA development guidelines shall encourage ecologically sustainable designs that minimize our impact on the land.
- SROA shall work with key community partners to develop and encourage sustainability practices.

PRIORITIZED ACTION ITEMS:

- Create guidelines for SROA to minimize environmental impacts of any proposed development/paving in and of open areas.
- Revise SROA community design guidelines to promote sustainability and minimize land impacts in construction & landscaping.
- Mitigate riverbank erosion by restricting river access to designated launch and access areas.
- SROA shall routinely assess and update its Ladder Fuels Reduction Plan.
- SROA shall prepare the community to respond to wildfire emergencies working with key partners.
- Create an Environmental Stewardship Policy for SROA, owners and community partners to promote sustainability practices (e.g., water, recycling, energy, etc).
- SROA shall work with key community partners to develop and promote sustainability practices
- SROA shall use sustainable practices including energy efficient construction and operation in all its own operations.

VIII. IMPLEMENTATION & BUDGETARY CONSIDERATIONS

With development of any strategic or other plan, there is concern that over time the plan will languish in its relevance to providing direction for the community and ultimately its implementation. In this vein, the development of yearly SROA departmental work plans with associated annual budgets and staffing needs will be guided by an annual goal-setting session by the SROA Board of Directors with the Strategic Plan serving as the basis for such discussions. The annual (calendar year) work plans and budget are reviewed by the SROA Finance Committee and Board of Directors, with the ultimate approval by the Board of Directors in the fall each year.

Implementation of various elements of the Plan through the Action Items will have budgetary requirements of varying degrees – for capital costs as well as the direct provision of services. Some items will inevitably cost more and take more time than others – that is where the Action Item prioritization done by the task force is an important planning tool for both the Board of Directors and staff. Additionally, the continual implementation of those Action Items that SROA has/is currently completing has been deemed important through the creation of this Plan with the necessary budget, staff and materials considered annually. It must be noted that it is not anticipated that all Action Items identified in this document will come to fruition. Implementation of various Action Items is dependent on identified needs at the time, budget/staff/volunteer availability, and yearly goals identified by the Board.

On an annual basis this Plan will be utilized, along with Board of Directors and staff input, to create yearly work plans that help develop the annual budget.

IX. MEASURES OF SUCCESS

As with any plan, an ability to measure success is necessary to ensure that all the thought and hard work to develop the plan (in order to achieve the purpose) has been worth it. Overall, the completion and implementation of Action Items in and of itself is a degree of success. However, having the results fulfill the intent of the Action Items is the true measure of success.

As stated previously, there is some overlap in the Action Items as they relate to the Guiding Principles, Goals and Policies – some Action Items fulfill multiple purposes in this regard. In addition to fulfilling multiple elements of this Plan, the Action Items also overlap various elements of the Guiding Documents listed in Section III. Continuing to consider and coordinate the Action Items in relation to the Comprehensive Owners Survey, the Parks Facilities Master Plan, Pathway Master Plan, Ladder Fuel Reduction Plan, etc., provides additional balance to ensure that SROA is meeting the needs of the Sunriver owners as those needs have also been expressed in multiple past projects.

This plan will be updated on an approximate 5 to 7 year schedule. The update will keep the document current with emerging trends affecting the community but most importantly with the desires of the owners (e.g., data collection via Comprehensive Owners Survey) as the community and demographic evolve. The goal is to maintain a community that reflects the ownership through a continually relevant and actionable Strategic Plan.

X. STRATEGIC PLANNING PROCESS

Upon the creation of the task force, an initial organizational meeting was held in September 2023. Subsequent meetings were specific in their intent and followed in the outline of this document in their progression. An initial review of the Guiding Mission (Mission Statement) was completed with an update that the task force believed was more representative of the community. The Mission Statement was intended to be a statement on the primary values of the community and be used as a guide to developing the Guiding Principles, Goals, Policies and Action Items as provided herein.

Each meeting included much discussion by the task force with many ideas debated along the lines of relevancy to Sunriver today (and for the next 5 to 7 years). Four subcommittees were created under each of the four Guiding Principles – their task was to meet independently to develop goals and policies that embody the Guiding Principles and then bring those back to the full task force for discussion and agreement. The task force attempted to achieve a consensus on all issues to the greatest degree possible with the majority presiding where a complete consensus could not be achieved. Ultimately, the subgroups developed “action items” intended to bring the entire Plan to fruition. Those action items were further prioritized for implementation over the next 5 to 7 years in a manner where the budget implications, staffing needs and community support can be assessed to develop solid annual work plans.

Overall, there were 12 full task force meetings prior to completing and recommending the final draft presented to the SROA Board of Directors for consideration. In addition to the task force meetings, a virtual town hall meeting was held April 23, 2024 to educate the community on the intent, process and goals – and the status/progress to date – and to hear owner comments and answer questions. Aside from the broad representation on the task force aimed at touching all parts of the community, additional public involvement/input consisted of:

- Monthly status updates at the monthly/public SROA Board of Directors meetings.
- Article in the Sunriver Scene newspaper and posted to the SROA website.
- A virtual forum was available for owners to hear about the project and then ask questions, get answers and provide comments.
- A 45-day formal comment period where owners were invited to submit written comments.

Aside from the formalities of the meeting process, the meetings were also designed to gather the individual perspectives of task force members about the past, present and future of the community – to identify similarities and differences, and to develop a longer-term vision that can provide the basis for the next Strategic Plan.

Notwithstanding the formal process undertaken to develop this Plan, the complexities of the inter-relationships between the parties comprising the task force (before, during and after this process) cannot be emphasized enough. Although this Plan is underwritten by SROA, the composition and participation of the task force ensures a degree of ownership and responsibility for all involved. In short, the Plan cannot come to fruition through the actions of SROA alone. The continuing harmonious and collaborative dynamic between all stakeholders and community partners – and sharing of responsibilities – is instrumental in the Plan’s success.

XI. TASK FORCE CREATION – PURPOSE, PARTICIPANTS & PARTNERS

The creation of a task force was deemed essential in developing a Strategic Plan that was truly representative of the Sunriver community. The SROA Board of Directors ultimately created the task force in August 2023 based on a five-point directive as required by the SROA bylaws and Committee Policy. The task force is comprised primarily of owners along with stakeholders and partners from the community with experience in strategic planning. Additionally, such broad membership greatly assisted in identifying existing issues and future needs/methods to implement an association plan of this magnitude. The list of owners/members and stakeholders/partners included the following:

- SROA Staff (2-4 max)
- SROA Board Liaisons (4 max)
- Sunriver Service District (Police and Fire Department) Representative(s)
- Key Community Partners (Sunriver Resort, Village at Sunriver, Sunriver Nature Center & Observatory, Sunriver Airport and local property managers)
- Owners that represent permanent/full-time residents, part-time residents, rental property owners, new owners and long-standing owners.

The following is the five-point directive (provided verbatim) adopted by the SROA Board of Directors:

1. **Scope of work with anticipated completion date**

Creation of the task force with specific members appointed for the purpose of:

- To help develop the intent/purpose for the Strategic Plan.
- Identify the needs of SROA overall.
- Utilize historical data and current conditions as foundational building blocks.
- Conduct an internal SWOT analysis.
- Utilize key components of SROA's Mission Statement as a guidebook for developing action items.
- Identify and focus on SROA's Core Values.
- Create a community supported Vision Statement.
- Determine departmental infrastructure and operational needs to professionally serve the demand of owners.
- Work in collaboration with action items from other recent SROA plans (IAMP, IT, Pathways & Recreation/Facilities)
- Develop a strategic road map (actionable goals) while being financially and fiscally responsible.
- Develop implementation strategies and timelines in conjunction with SROA's budget cycle and Reserves schedule.
- Timeline – six to eight months, with completion in spring/summer 2024.
- Updates to SROA Board on a monthly basis.
- Through the guidance of the association's Mission Statement, the final 2030 Strategic Plan document will be used to guide staffing levels, operational & facility needs, and budgetary planning, based on the Plan's recommended guiding directives.

2. Background information

The ownership participation on the task force (once appointed) will be made up of owners and community partners who have years of professional career experience and lifestyle knowledge that will translate to being an effective and engaged participant. In addition, we will meet with representatives from each SROA department to acquire any relevant background information necessary to implement the scope of work listed above.

3. Coordination requirements, accomplishing the assigned task and reporting findings

SROA staff will take the lead on organizing the task force, including the scheduling of meetings, keeping notes, developing draft documents and distributing information among task force members. It is not anticipated to be necessary but, if a consultant is determined necessary/useful for a component of the 2030 Strategic Planning process, SROA staff will work with the consultant to determine the best course for specific and essential elements of the Plan (to share duties). SROA staff, with the assistance of the task force members, will assemble the final Plan, which will be presented to the SROA Board for final approval.

4. Available support

Support to the task force will consist of SROA staff, as well as volunteer support from the task force members – and possibly a consulting professional as may be determined by the task force itself.

5. Other pertinent information (composition of the task force)

The task force should be composed of the following:

- SROA Staff
- SROA Board Liaisons
- Owner Representatives
- Sunriver Service District Representative(s) – Police and Fire Departments
- Key Community Partners (Resort, Village, SNCO, Airport and local property managers)

The directive adopted by the SROA Board was realized and provided instrumental guidance in creating a balanced and well represented task force who completed the identified scope of work culminating in this document.



The Strategic Plan Task Force members include:

Bill Boos

Bill Burke

Tony DeAlicante

Amanda Enstrom

John Gifford

Scott Gillies

Heidi Hanson

Tom Hardesty

Pam Hays

Susan Jain

Keith Kessarlis

Lenna Kimball

Daniel Kress

James Lewis

Steve Lopez

Phil May

Mike Mitchell

Keith Mobley

Eric Nelson

Betsey Nelson

Kellie Neumann

Don Nolte

Rich Phelan

Ken Provencher

Corey Roy

John Salzer

Denise Schiffman

Stefani Shanberg

Mark Smith

Jill Stephens

Stacy Wesson

Josh Willis

XII. APPENDICES

Appendix A – Additional (Potential) Action Items

The following list includes additional and potential Action Items identified and discussed by the task force. **Current and ongoing Action Items are highlighted.**

EXCELLENCE IN GOVERNANCE

- SROA to hire a full-time compliance officer.
- Stay connected to regional and national HOAs/consultants.
- Regularly review Governing Documents for best practices, risk management & policies.
- Coordinate with Sunriver Service District to remain aware of practices & procedures.
- Comply with legal and regulatory requirements.
- Continually update a code of ethics, conflicts of interest, retain docs, cyber security.
- Communicate with stakeholders about association challenges/opportunities.
- Develop and utilize best practices – reports/elections/education materials.
- Provide info on how the Board operates, trains and nominates new and prospective members.
- Maintain Board confidentiality when requested for human resources & legal issues.
- Define Board expectations, standards & policies, and fiduciary responsibility.
- SROA to seek regular external feedback & evaluation to measure performance.
- Participate in voluntary & accredited programs for best practices for HOAs.
- Collaborate with Sunriver Service District & other safety/emergency organizations for proper preparedness.
- Analyze the 2024 & 2027 Comprehensive Owners Survey to understand owner's interests, concerns & trends.
- Compare the 2024 Comprehensive Owners Survey to previous years for consistency & differences.
- Communicate with owners on issues affecting the community (e.g. Sunriver You Town Halls).
- Utilize technology to increase owner participation in SROA committees, task forces & Board.
- Support efforts of the Nominating Committee to recruit all types of owners.
- Use expert consultants when needed for info gathering & best practices.
- Regularly review compliance with SROA financial policies & update as needed.
- Regularly review best practices in risk management to update policies & procedures as needed.

- Regularly provide info to owners on SROA's financial strength & decision making.
- Investigate new & alternative funding sources to minimize impact on owner maintenance fees.
- Seek buy-in from all owner demographic types regarding future IAMP items & decisions.
- Collaborate with correct agencies impacting Sunriver to identify realistic emergencies.
- Collaborate with correct agencies for proper emergency preparedness for transparency.
- Coordinate with key agencies/entities for evacuation plans & mass casualty events.
- Routinely communicate emergency preparedness plans via SROA links & articles.
- Encourage owners to sign up for emergency notifications.
- SROA will coordinate with agencies in their development of emergency management plans.
- Conduct yearly Ladder Fuel Reduction on SROA commons.
- Conduct yearly Ladder Fuel Reduction inspections/enforcement on private property for home hardening.
- Evaluate the need for a Community Partnership Committee for various topics.
- Identify key regional partners with intersecting goals (e.g., SSD, SNCO, Village, SRLP & ODOT).
- Track coordination with key regional partners ensuring regular coordination (e.g., yearly).
- Assess coordination with regional partners to the SROA Board (two times per year) to update actions discussed.

QUALITY OF LIFE | SUNRIVER EXPERIENCE

- Identify top issues that are “unsafe, high risk, worry topics.”
- Develop a “Safety Dashboard” with input from Sunriver Service District, key community partners and Sunriver Business Park.
- Identify ways to improve top safety issues.
- Determine what is allowed on SROA pathways with signage, kiosks and patrol.
- Stage Bike Patrol at “unsafe locations” during peak seasons (e.g., Village, Cardinal Landing Bridge).
- Identify opportunities to enhance pathway experiences (e.g., educational signs, fun facts).
- Increased owner/renter awareness of SROA Rules & Regs (similar to the previous Rules Awareness & Compliance Task Force).
- Monitor/re-enforce “Nuisance” rule. Seek policy for non-compliance & ensure awareness.
- Increase owner/property manager accountability for renter compliance (e.g. safety & lifestyle).
- Increase volunteer-led community service programs, such as “Litter & Trash Rangers.”
- Continue reviewing existing promotional & IT efforts for future amenity opportunities.
- Regularly review SROA committee input/recommendations (OEC, Design, Covenants, etc.).
- Identify new task forces or work groups for future or updated amenities, as needed.
- Consider significant feedback from owners of the 2024 Comprehensive Owners Survey for amenity desires.

- Identify similarities/differences between community partners based on Sunriver’s brand ideas.
- Ensure alignment between SROA financial investments and expectations for each SROA asset that impacts property owners and guests.
- Promote OEC and its educational opportunities to owners through increased exposure (e.g., Scene).
- Promote owner events for “post work hours” and to include owners who work from home.
- Through SROA Board actions, develop community leaders to support “inclusion values.”
- Partner with local businesses to anticipate demand/impact of more year-round owners.
- Plan for increased use of SROA facilities/resources/services.
- Address infrastructure and amenity issues (e.g. cell phone coverage, lack of public parking, etc.).
- Maintain owner experience during peak seasons. Key in on top issues/concerns & opportunities.
- Increase inter & intra transportation options (e.g., Harper Bridge float, Mt. Bachelor & around Sunriver).
- Monitor Deschutes County growth & anticipate the impact on Sunriver (owners & visitors).
- Try to find a solution to reducing airport noise throughout the year.
- SROA to identify opportunities for “off-season” events/activities that support Sunriver living & lifestyle.
- Identify opportunities with local businesses/partners for year-round events (e.g., K9 Keg Pull).
- Seek best practices when communicating info through multiple channels (one promotional hub).
- Create a campaign around “Things to Do” in Sunriver. Bring back concepts like Sunriver Style promotions.
- Identify ways to be creative & resourceful regarding communication outreach.
- For visitors, enhance ways for them to know what activities are happening in Sunriver during their stay.
- Increase awareness of Wildfire Prevention Plans/actions for owners & visitors. Ensure compliance.
- Determine how to increase awareness of new Design Manual through multiple messaging channels.
- Determine how to increase awareness of updated Sunriver Rules & Regulations through multiple messaging channels.
- Determine how to make the design review process more “owner friendly.” Expedite efficiency.
- Seek additional ways for owners to maintain and improve the private property/structures.
- Coordinate with property management companies to capture the “visitor experience” while in Sunriver.

COMMUNITY ENGAGEMENT

- Assess existing amenities available to guests & consider updating existing SROA facilities for growth.
- Assess new amenities for owners/guests (e.g., additional pool, gym & indoor court activities).
- Continue to maintain & enhance SROA pathways, as a key sought-after asset.
- Consider additional parking solutions or an intra-Sunriver shuttle during peak seasons.

- Effectively communicate the Sunriver activities, facilities, rules & opportunities to owners/guests.
- Maintain & enhance Sunriver by creating a shared sense of community among guests & owners.
- Maintain & enhance Sunriver by ensuring facilities/activities offered are updated, modern & best-in-class.
- Working with the OEC, SROA shall engage and connect with all types of diverse owners and visitors.
- Effectively communicate/engage relevant info through the potential creation of a Communications Task Force.
- Utilize & update SROA communications channels such as: websites content, signage, social media, etc.
- Maintain Sunriver Code of Civility & promote a respectful, welcoming, inclusive & family-friendly environment in Sunriver.
- Engage new owners & endeavor to attract new generations by creating a “Welcome” Committee.
- Assess the feasibility of additional indoor facilities offering year-round activities.
- Seek to expand longer seasons for current facilities such as Member Pool & SHARC.
- Coordinate with businesses in the Village & Sunriver Business Park to discuss the need for year-round activities.
- SROA to work with the Sunriver Area Chamber of Commerce to promote new businesses to owners & visitors as year-round resources.
- Consider shuttle service to ski areas, within Sunriver and to Bend. Maybe partner with a third party company.
- Work with property management companies to capture the “visitor experience” while in Sunriver.

ENVIRONMENTAL STEWARDSHIP

- Perform assessment of progress on current environmental initiatives (noxious weeds & Ladder Fuels Reduction).
- Create an Environmental Stewardship Policy for SROA staff, owners and community partners.
- Create a Land Use Policy for SROA to minimize ecological impacts (e.g., dark skies, chemical use).
- Assess the environmental impacts of any proposed development (paving) especially in open areas.
- Mitigate riverbank erosion by restricting river access to designated launch and access areas.
- SROA design guidelines to promote eco sensitive design principles (construction & landscaping).
- Provide education of important wildlife habitats and key species to owners/visitors with partners.
- SROA shall acknowledge the importance of wildfire risk in Sunriver.
- Continue to monitor and update SROA’s Ladder Fuels Reduction Plan, balancing the natural environment & wildfire risk.
- SROA to coordinate wildfire protection plans with SSD, Deschutes County, USFS & ODF.
- SROA shall prepare the community to respond to wildfire emergencies (work with key partners).
- SROA shall use sustainable practices including energy efficient construction and operation.
- SROA development guidelines shall promote environmental sustainability to minimize land impacts.
- SROA shall work with key community partners to develop & promote sustainability practices.