

# SROA VISION 2020

## Executive Summary

March 18, 2011



## **Section 1: Overview**

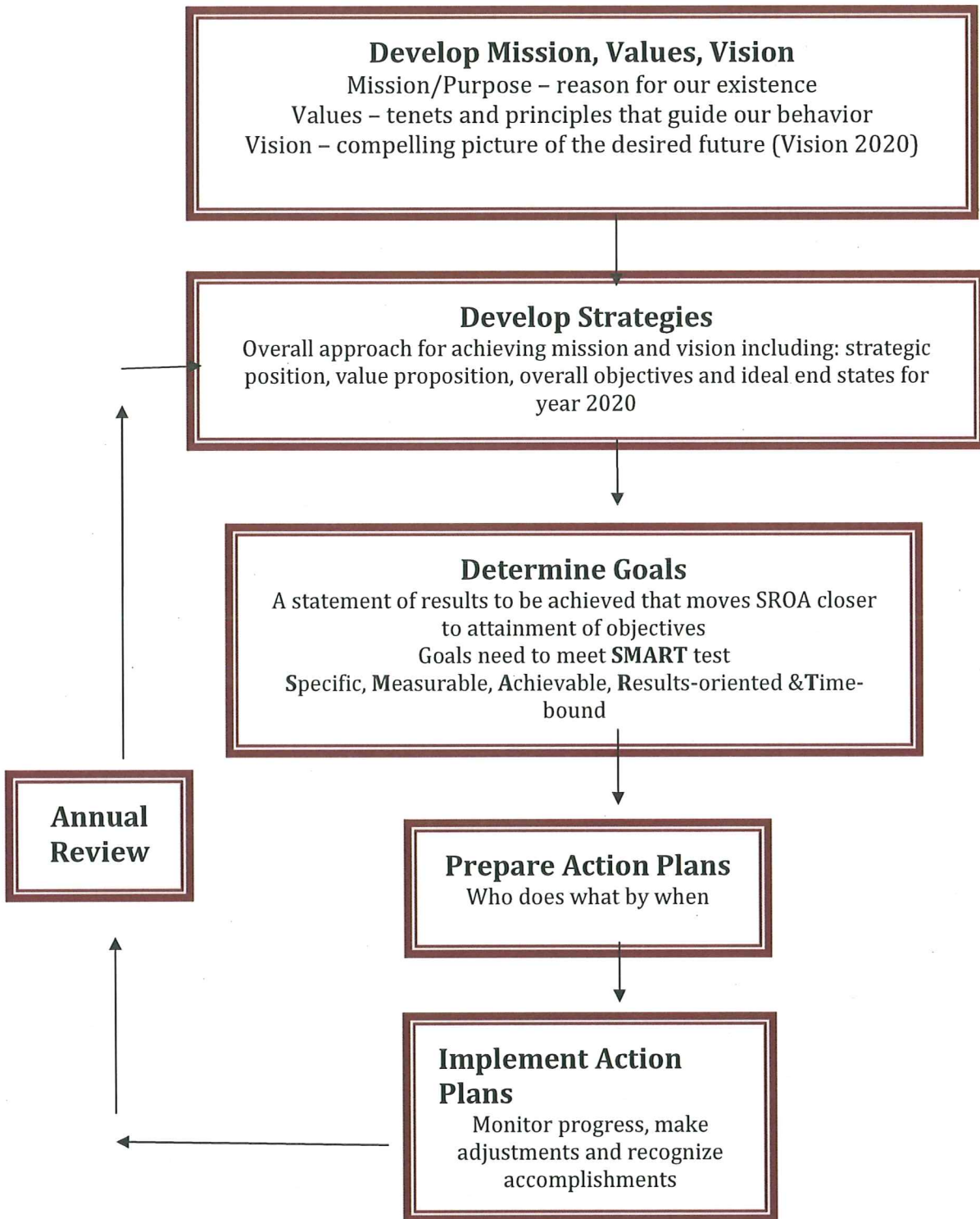
The SROA Vision 2020 is a strategic plan document for the Sunriver Owners Association. Vision 2020 is intended to provide the SROA Board of Directors and General Manager, and their successors, a leadership tool to ensure the continuation and enhancement of Sunriver's strategic position or distinctiveness, which is:

**“An effective balance of a wide variety of high quality natural and man-made amenities that appeal to full-time residents, vacationers, retirees, sports and outdoor enthusiasts and families alike, delivered at a reasonable cost.”**

The SROA Vision 2020 document consists of six sections followed by annual status reports summarizing the achievement of annual strategic plans for years 2010 – 2020.

- Section 1: Overview
- Section 2: The Strategic Planning Process and Definition of Terms.
- Section 3: Sunriver Foundational Statements
- Section 4: Strategic Position: Sunriver's Distinctiveness
- Section 5: Major Objectives for Year 2020 and Related Goals
- Section 6: Long-range Financial Planning Overview

**Section 2:**  
**SROA Strategic Planning Process**



**Section 3:**  
**Sunriver Foundational Statements**

- A. **SROA Mission** (why we exist, our purpose as an association): Maintaining Sunriver as a premier residential and resort community, protecting and enhancing its quality of life, natural environment and property values.
  
- B. **SROA Values** (our core beliefs that guide our daily actions and decisions as a community):
  - a. Protecting our environment
  - b. Enriching our quality of life
  - c. Ensuring a safe and secure environment
  - d. Protecting our property values
  - e. Ensuring financial soundness and stability
  - f. Proactive governance
  - g. Supporting volunteerism
  - h. Anticipating and planning for the future
  - i. Maintaining a premier residential and resort community
  - j. Sustaining a close working relationship with our owners
  
- C. **Sunriver Vision 2020** (our compelling picture of what we intend that Sunriver will be in the year 2020 as characterized by):
  - a. Its natural beauty
  - b. Its desirability as a place to live.
  - c. Its outstanding recreational and social activities
  - d. Its financial soundness and sustainability, and
  - e. Its protection of property values
  - f. Its maintenance of high quality infrastructure
  - g. Its commitment to balanced economic development

**Section 4:**  
**Strategic Position: Sunriver's Distinctiveness**

There are aspects of Sunriver that are most crucial to maintaining and furthering our overall strategic position/distinctiveness in the market. These are the aspects in which SROA has the greatest ability to influence and where we will continue to invest, develop and maintain at a level of incomparable quality and excellence:

1. Remaining fully committed to preserving the natural environment.
2. Maintaining and improving the quality of Sunriver's man-made amenities and activities, especially:
  - a. Amphitheater/community center/aquatics complex
  - b. Bike and walking pathways
  - c. Tennis facilities
  - d. Parks
  - e. Access to the Deschutes River
  - f. Wintertime facilities and activities
  - g. Support of Sunriver Nature Center and Observatory
  - h. Support of cultural activities
3. Maintaining a mutually beneficial relationship with the Sunriver Resort
4. Maintaining a mutually beneficial relationship with all business owners in the Sunriver community.
5. Maintaining and developing capabilities of SROA leadership and staff.
6. Supporting the continued high quality service and cost effectiveness of the police, fire and paramedic services.
7. Developing an up-to-date information technology infrastructure.
8. Developing an appropriate balance of full-time and part-time residents and owners.

**Section 5**  
**Major Objectives for Year 2020**  
**and Related Goals**

Four major objectives the Association aims to achieve by the year 2020 include:

1. A comprehensive amenity, facility and site development plan
2. A well-developed financial structure that ensures a sound financial future
3. A high-quality of life experience for all owners and their guests
4. Sound Association leadership and management

To ensure the achievement of each object, measurable goals and plans will be identified and implemented which will take into consideration the current environment and resources available at the time.

Accordingly, the SROA Board of Directors and General Manager will create annual strategic business plans during the plan period 2010-2020. Strategic planning teams will annually review each objective to ensure its appropriateness. They will identify goals and plans and will coordinate the implementation of these plans throughout each calendar year.

The goals identified each year will address the four major objectives identified above and the eight aspects identified in section four which will maintain and further develop Sunriver's strategic position or distinction.

## **Section 6**

### **Long-range Financial Planning Overview**

The current Reserve Funding guidelines outlined by the Reserve Specialist should provide adequate funds to replace and enhance existing assets and amenities for the foreseeable future. However, to fund new capital assets without going to owners for a special assessment, alternative funding methods need to be determined. Sunriver prepares an annual budget and a multi-year budget to determine if the association can operate within its means. Currently the Association is financially sound and functions within its means and can for the foreseeable future. However, to remain a premier residential and resort community it needs to continue to invest in the community and implement a strategic plan that prioritizes its amenities and capital improvement plans and the financial resources to fund the expenditures.