

**OAK MEYER GARDENS
Homes Association
STRATEGIC PLAN
JANUARY 2019**

VISION

Oak Meyer Gardens (OMG) is a neighborhood that all are proud to call home--a community of friendly, caring and respectful neighbors who cooperate with each other to create friendships, improve our quality of life, and grow the value of our property.

MISSION

Oak Meyer Gardens' mission is to enhance the quality of life through management of common areas, advocacy of rules and covenants, support of initiatives that strengthen relationships among residents, and investment in capital improvements and services that benefit the neighborhood community.

CORE VALUES

Quality service
Open and honest leadership
Thoughtful and consistent stewardship
Effective teamwork
Creative innovation
Diversity & inclusion

OBJECTIVES

- * Establish and maintain appropriate and effective forums to actively listen to and clearly communicate with the community and obtain its involvement.
- * Encourage collaborative and diverse participation in OMG that includes an involved membership.
- * Satisfy, maintain and enhance community support requirements relating to property values, legal and safety issues.
- * Establish and maintain a strong financial foundation for all OMG operations.
- * Build community relationships that capitalize on best practices and improve opportunities.
- * Be forever mindful of and preserve the Association's Vision, Mission and Values.
- * Serve in the best interests of OMG.

Financial Implications of the Strategic Plan

It is recognized that portions of the OMG Strategic Plan may involve funding not presently reflected in the budget and for which no source of funding presently exists. It is not the intention of the OMG Board of Directors to authorize implementation of any part of the Strategic Plan absent the existence of sufficient OMG funds to accomplish implementation. However, the strategic planning process through its associated endeavors and standing committee recommendations should be used as an informational and guiding document for input into the OMG financial budgeting process.

Strategic Drivers and Tactics

The Strategic Plan recognizes that one of the strongest assets of OMG is the friendliness and sense of community pride evident among its residents. It is important that OMG's culture is supportive of the strategies and endeavors contained within the Strategic Plan. Only through active community support and communication can the culture continue to evolve to reinforce the values and principles that are important to ensure that sense of community pride that is necessary to maintain OMG as a premier neighborhood. The eight pillars (strategic drivers) of the Strategic Plan are outlined below.

1. Active Involvement of OMG Membership

OMG must continue to expand its ability to promptly and effectively communicate with its members - communication must be two-way. The Association must utilize advances in technology and have infrastructure to enable the use of available technology to enhance communications. The use of the Internet and an interactive website is essential. Newsletters, the OMG website, and Internet messaging should be continuously enhanced and used. The OMG Board agenda and subsequent minutes will be posted on the OMG website as well as the Strategic Plan itself. The use of subject matter specific town hall meetings should be considered for appropriate topics where membership input is vital to the Board's decision-making process.

The Block Captain Program (BCP) was created to "reach out" to the community through neighborhood outreach representatives acting as links to provide two-way communication with the membership on policy, decisions and concerns to the members in each distinct block. This Program is a valuable interface with the membership and should be used as a vehicle to communicate OMG policy and decisions. The OMG Board must strive to complete, validate, and keep current its inventory of membership email addresses and telephone numbers.

The OMG Communications and Activities Committee will actively oversee the effectiveness of the HOA's website in terms of communicating and messaging with membership as well as the Internet public. The OMG Communications and Activities Committee will determine website functionality, user friendliness and application requirements.

2. Managing Security

Security and the feeling of security are primary goals of OMG. As such, the Strategic Plan addresses both. The OMG Board will have a Security Committee providing input and recommendations to the Board on all security matters. It is critical that the Security Committee has access to relevant resources and skill sets in order to evaluate existing processes, technologies, and best practices related to neighborhood security. The Security Committee should consider actions providing out-of-town "house watch" services, responses to house fires, including evacuation orders of KCFD, house security alarms, personal injury and medical emergency situations.

3. Promoting a Safe Environment

Equally important is the safety and perceived safety of the OMG community. Tactics for promoting a safe environment will be monitored by the Security Committee. This strategic driver involves an on-going relationship and communication with the Kansas City Fire Department (KCFD) and the Kansas City Police Dept. (KCPD), requesting assistance on issues as appropriate.

The streets of OMG not only accommodate vehicles but walkers, joggers and cyclists, etc. The safety of our streets is critical to the neighborhood. OMG must utilize all lawful means to enforce speed limits and other vehicle rules and regulations within the neighborhood. The Security Committee will evaluate OMG streets in order to create a culture of safe driving. Additional efforts will be taken to consider other ideas to maintain the safety of our streets.

4. Effective Management of Common Space

Infrastructure is a critical asset in maintaining OMG's vision of a quality Kansas City neighborhood. The OMG Board will use annual homeowner's dues for the maintenance and repair of common spaces to ensure the preservation and protection of OMG property values.

The overall beauty, landscaping and maintenance of both common areas and homeowner residences are essential to the Strategic Plan. In this regard, OMG has established the Beautification Committee as a standing committee to ensure the integrity and maintenance of all common areas. The Beautification Committee will develop a Landscape Master Plan for the common areas which will suggest

areas of priority for the refurbishment of existing common area landscaping, trees, irrigation systems and hardscapes - walls, sculptures, rocks so as to preserve the beauty of our neighborhood. The Plan may also address the need for water conservation and usage of plants that will thrive in our climate conditions on a long-term basis. The Plan will suggest an attractive way to clearly visualize the boundaries and streets within OMG that might include common landscaping, street light banners, signage, etc.

The OMG Beautification Committee will strive to develop a long-term capital improvement plan. This plan must be appropriately revised annually with approved funding at a level necessary to achieve this goal.

The Beautification Committee is responsible for providing to the Finance Committee the fiscal impact of any improvements as input into the Capital Reserve Plan. The Committee will also review landscape plans for common areas of any new developments within OMG and provide the approval of all landscape requirements within OMG Common areas. The Committee will oversee the ongoing landscape maintenance of all common areas.

5. Effective Management of Financial Resources

The OMG Board holds the fiduciary responsibility for the financial resources of the Association. This fiduciary responsibility is administered through the Board Treasurer who chairs the Finance Committee. The Committee seeks to cover a broad spectrum of financial and accounting functions that complement the integrity in financial reporting with forecasting to enable OMG to meet both its operating and capital demands.

The scope of the fiduciary responsibility is accomplished on a two tier basis-Operations and Reserve Budgeting. A comprehensive approach to monthly financial reporting incorporates all aspects of the current state of financial position, while drawing a comparison to the budgeted projected position. In so doing, the Board and the Finance Committee are kept fully apprised of the current financial position and can take a proactive approach to remedy any deviations that may likely occur. At each meeting, the Board votes to accept the monthly financial statements from the previous month's operations, as presented by the Treasurer, after approval from the Finance Committee. Each month's financial statements become part of the permanent record for the Board. The financial statements are prepared by a Certified Public Accountant (CPA) and are presented in accountants' compilation report signed by the CPA responsible for preparing the financial statements.

The Finance Committee assists management in preparing, reviewing, approving and recommending to the Board the yearly Operations and Reserve Budgets.

The priority of all infrastructure projects must be evaluated on a yearly basis to properly plan for the future.

The Finance Committee will review the current procedures for bookkeeping, account posting, remittance and billing and other OMG financial operations to determine opportunities to make the processes more efficient with better controls.

6. Participating in the Brookside Community

The Strategic Plan views OMG as part of the greater socio-economic system of the Brookside community of Kansas City. That system involves many stakeholders and many social requirements that impact the Association members. OMG shall provide for active involvement in those organizations that can impact the social and financial well-being of OMG. Tactics include involvement in political PACs in order to have a voice in local politics, representation at City Council meetings as needed to protect OMG values, representation at City Planning and Zoning Commission hearings as appropriate; OMG memberships in local Chambers of Commerce, etc. OMG is home to many people who directly participate in (or have connections to those who participate in) political and economic activities in the greater Kansas City area. It is important that the Board is aware of the changing social and economic environments surrounding OMG so it can assure that change protects and enhances the value of homeowner property.

7. Maintenance of Effective OMG operations

OMG can only function efficiently through the combined efforts of dedicated member volunteers. Together the member volunteers who populate the OMG Board of Directors and its committees select and oversee the work of the numerous vendors who provide services to the OMG community. Therefore it is incumbent on the OMG board to ensure that they recruit knowledgeable, committed, OMG members, willing and able to commit the time and energy necessary to serve on the OMG board and its committees. This necessarily involves succession planning for these volunteer positions to ensure, among other things, the presence on the board/ committees of volunteers possessing an institutional knowledge of the significant issues requiring the attention of the OMG Board.

Tactics and Priorities

Ongoing Effectiveness of the Strategic Plan

The OMG Board should, from time-to-time seek the assistance of selected local real estate companies representing buyers/sellers of homes in OMG to devise a market based evaluation on the success of the Strategic Plan in accomplishing its

primary mission of preserving/enhancing quality of life respective to other similarly situated communities.

Active Involvement of OMG Membership

1. Utilize the OMG website for increased messaging to the neighborhood Members, as well as develop new capabilities to enhance usage such as electronic directory, local maps, photo gallery, individual account management, etc.
2. Audit OMG systems and databases used to communicate via letter or email to association membership. Review for completeness, accuracy, efficiency and update procedures as needed.
3. Consider the use of town hall meetings to discuss very important topics affecting Association members.
4. Promote and encourage, on a distinct block level, the interaction of neighbors. Use the “Block Captain Program” to further reach out to neighbors in times of need, and to welcome new members to the neighborhood. Establish an OMG welcoming letter and provide new neighbors a welcome basket that is designed with efficient and effective tools to promote community awareness.
5. Maintain and audit contact information for each member in order to communicate OMG policy decisions and neighborhood updates.
6. Work in tandem with the OMG Communications and Activities Committee to plan special neighborhood events. These events will be oriented to building community and cultural activities.
7. Consider the use of an OMG survey to get neighborhood input on selected key issues under consideration and look for any significant unmet needs.

Promoting a Safe Environment

1. Communicate to the membership regarding emergency planning general information such as importance of visible and reflective house number signage, updates of homeowner records with the HOA records, and updates on KCFD and KCPD available resources and procedures.
2. Ongoing involvement with KCPD. Develop an ongoing relationship with key contacts within KCPD for assistance as needed for enforcement or patrolling within OMG.
3. Instill a culture of safe driving at reduced speeds in OMG.

Effective Management of the Physical Plant and Facilities

Create an inventory of OMG physical assets. Consider evaluating these assets from a usefulness and financial perspective, including the following:

1. The OMG Landscape Plan addresses the policy and guidance on all common areas plantings, maintenance, refurbishment and design as well as all lighting related to OMG landscape. The Landscape Committee should update each year's annual work program along with the appropriate investment amounts for capital reserve budgeting. That committee will also assume responsibility for periodic reviews of the landscape maintenance contract and make appropriate recommendations to the HOA board concerning the need for a new or revised landscape maintenance agreement.
2. A Capital Reserve Study, which is updated no less frequently than every 3 years, to ensure reserves are sufficient to fund required infrastructure hisprojects.
3. An annual Street and Sidewalk Maintenance and Repair Report that addresses the requirements for ongoing street and sidewalk maintenance and refurbishment needs that is updated annually for communication to the City of Kansas City.
4. Identification of any other infrastructure project that needs consideration and prioritization in the annual operations or capital budget.

Enforcement of HOA Covenants and Restrictions

1. The Board will proactively inventory a list of all possible changes to OMG's Restrictions and Covenants for consideration and inclusion in a package of changes that the HOA Board would recommend for an Association membership vote in the future.
2. Protect the integrity of all covenant and restrictions through proactive monitoring by the OMG Board.
3. Proactively review and determine courses of action of all covenant and restriction enforcement requests. Establish a procedure for proactive review of all properties in violation of covenants and restrictions with the oversight of the Board.
4. Maintain the integrity of all common OMG land areas.

Effective Management of our Financial Resources

1. Review the processing procedures and controls for collection, posting and disbursements of funds. Determine areas where efficiencies, productivity tools and internal controls can be implemented and make recommendations as needed.
2. Ensure an annual outside audit of HOA annual financial statements is conducted.
3. Oversee the development, reasonableness and completeness of capital reserve studies and operating and capital budgets.

Participating in the Greater Kansas City Community

1. All Board members should act as Liaisons to the Brookside community organizations.
2. Assure that OMG strives to have involvement and/or representation in all of the following organizations that might exist from time-to-time:
 - City of Kansas City Planning and Zoning Committee,
 - KCFD,
 - KCPD,
 - City Council of Kansas City, MO,
 - Southtown Council,
 - Brookside Merchants Association.

Interworking Relationship with the greater Brookside Neighborhood

1. Continue to pursue joint programs with the Brookside merchants for common benefit of OMG and the Brookside community.
2. Collaboratively work with the management and ownership of the Brookside community on common issues of security, association communications, economic development of surrounding area, etc.