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Strategic Planning in a New Year

OUTLINING A COMMUNITY'S VISION AND HOW TO MAKE IT HAPPEN

BY NATHAN
VARN

How can a community improve this year? How does the industry continue to get better? These are just two questions that industry professionals, board members, and residents may be considering at the start of the new year. The answers are not quick and simple, but that's the beauty of a brand new year. It is an ideal time for associations and property managers to determine the vision for the next several months and beyond.



Jake Howse

Jake Howse, a business development director at FirstService Residential, is fluent in vision planning for communities and property managers alike. Having been with the company for the past five years, he has worked with various properties to understand the perspective of boards and residents, often assisting them through a somewhat confusing process to find a new manager or vendor and then putting together a plan that will guide them to their goals. It boils down to “where are they going and



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how will they get there?” he says. For the managers and communities that Howse assists, he offers insight and suggestions for a productive year.

Looking at the year 2023, Howse can see two predominant projects that associations will be focused on. For condominium associations, all attention is on structural integrity reserve studies (SIRS). Howse says, “By December 31, 2024, all condominiums three stories and taller are required to have a SIRS completed, which determines reserve funding levels. If the community is underfunded right now, they are capital planning. They are totally focused on their budget, but it is not a normal budget season.”

Homeowner associations, on the other hand, are most likely concentrated on enhancing property values. When you drive around the state of Florida, you are looking left and right at new residential developments with new amenities. Established associations “have to be competitive with the surrounding communities,” says Howse.

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This means new or upgraded amenities, refreshed landscaping and curb appeal, or modernized security solutions. The latter two are often the first impression for visitors and potential buyers of these communities.

Additionally, new developments today are selling a lifestyle. "It's not simply about a pool behind the gate," Howse says. Many homebuyers are looking for an experience and a community to match or accentuate their everyday life. Is it security, is it a new or additional amenity center, or is it paved trails around the neighborhood for walking and biking? An existing association is likely seeking to determine, plan for, and showcase a lifestyle vision.

Whether your community is focused on the projects listed thus far or something else, in general, the biggest piece of advice that Howse has for managers and associations preparing for the year is, "Identify the issue, zoom in on what the problems are, and outline it." That's just step one, though, and it's a step that boards and their property managers should tackle together.

Step two is to "get apples-to-apples bid comparisons." This is a crucial step for the manager who needs to know the vendors and, more importantly, "call the right vendors in." Howse explains, "It's important for the manager to have great relationships with the vendors. You have to attract the best vendors that want to work on your property."

From there, Howse recommends that the manager complete a bid comparison project or worksheet. He elaborates more on how many boards like to focus on price, and it's the manager's responsibility to actually "drill down on the problem and the solutions, and be prepared enough to answer questions" that ultimately guide the association to the vendor that is the best fit.

Perhaps the most important component for any new project is board alignment. Howse explains how "[it's] critical, honing in on the priorities, making sure everyone is on the same page." Without consensus and focus, it is difficult for boards to be proactive and stay on target with their project. However, this is certainly where a manager can assist with

strategic leadership and encouragement to make sure nothing veers off course.

No matter the project, communities should also prepare for certain challenges over the next year. The biggest obstacle that Howse foresees, along with many others, is the labor market shortages and price increases. "The true cost to do business in Florida is different from what it was 18 months ago. There are so many communities trying to get work done, but the vendor shortage is real. As a manager, you have to be aware of this," says Howse. Furthermore, it's being aware of the current circumstances and communicating that to the board to help them understand pricing, timelines, and of course, vendor relationships (again).

What if you don't know the vision for your community yet? Even if you think you do, Howse says it's crucial that boards and their managers do not miss out on this important event at the beginning of a year. Rather than reacting to

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an issue or throwing together an incomplete plan, “Spend the time, go off site, and get a place where all board members can write on a white-board what their objectives are.” This is a process that managers can lead to help an association determine and understand their strengths, weaknesses, and opportunities. “You have to truly plan where [you’re] going. Plan a vision statement.”

With a thought-out plan for the coming months, a community can begin to calendar (yes, actually fill in dates) what happens when, and who does what. For example, if new security solutions are needed, mark the date the community will begin asking for consultations and bids. Then, what date will all options be compared; and finally, when will the board make a decision? Not only does the manager have the direction he or she needs by doing this, but everyone remains accountable, and the community can “measure the success throughout the year.”

Strategizing for the year ahead is far more important than most may give it credit, but it’s how we answer our leading questions. It’s where associations and managers will find and make their improvements, and it’s how the industry will continue to move in a positive direction. As Howse says, “A community will run so much more efficiently when the board [and manager] know where they want to [or need to] go... They are well-run and know where they’re heading for the next year and beyond.” ■

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