



**SUDDEN**  
VALLEY

## Pre-Work for Strategic Planning Team Members

**Review Before  
Strategic  
Planning  
Retreat**

### **Planning Processes**

#### **The Strategic Plan**

- 2021 Strategic Plan
- 2021 Strategic Planning Guidebook
- Updating the Strategic Plan

*\*Worksheet\**

*- Please complete prior to the Strategic Planning Retreat.*



**SUDDEN**  
**VALLEY**

**2021 - 2023**  
**Strategic Plan**

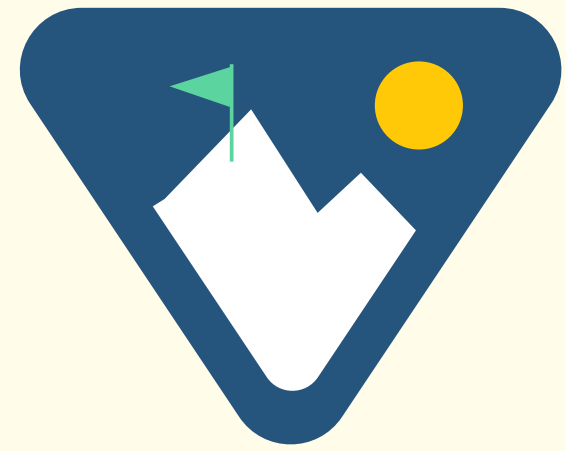


# Thank you!

The Strategic Planning Team would like to thank all of you for your active involvement. Your voice matters in this important conversation and work to create a better Sudden Valley.

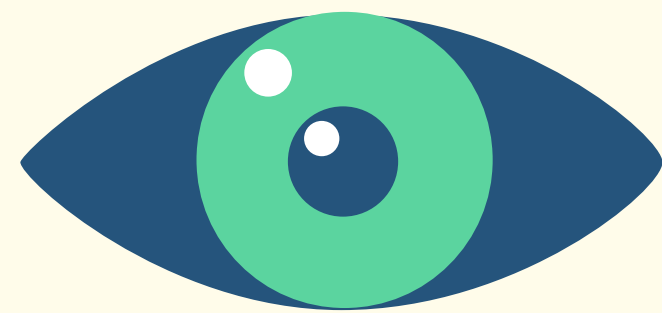
For more information on the Strategic Planning Sessions, please visit [www.SuddenValley.com](http://www.SuddenValley.com), or email the Long-Range Planning Committee at [LRPC@SuddenValley.com](mailto:LRPC@SuddenValley.com).





## OUR MISSION

is to foster a livable and inclusive community through exceptional service, transparency, and responsible stewardship of our shared resources.



## WE ENVISION

Sudden Valley as a sustainable and collaborative community where natural beauty, recreation and civic engagement create a sense of belonging for our diverse membership



# Summary

In early 2021, the Sudden Valley Community Association (SVCA) Strategic Planning Team held a series of collaborative strategic planning meetings. The Strategic Planning Team consists of the current members of the SVCA Board, Long-Range Planning Committee, and key SVCA management and staff. The Strategic Planning Team reviewed the planning process, updated Sudden Valley's Mission and Vision statements, and identified core Values, and Strategic Priorities.

The SVCA is engaging in strategic and long-range planning to ensure the community's expectations of the Association are being met. Strategic planning is not intended to solve every planning problem, but it allows available resources to be focused on the actions that will benefit the SVCA and its membership the most. It creates solutions that are developed by working collaboratively and in consultation with members, volunteers, and staff across the SVCA organization.

This year's budget process is the Sudden Valley Community Association's first to be presented utilizing the budgeting and planning processes developed by the 2020 Long-Range Planning Committee (LRPC) and guided by the Strategic Priorities identified in the 2021 Strategic Planning Sessions.



## What Is Covered By The Annual Assessment?

There are four components that go into your Annual Assessment:



### **Operations Fund:**

Annual revenue and expenses for all amenities and HOA services.



### **Capital Repair Replacement Reserve Fund:**

Funds for major repair, replacement, and restoration of common area components.



### **Roads Reserve Fund:**

Funding for major roads, bridges, and culvert work.



### **Mailboxes Reserve Funds:**

Anticipated expenses for cluster mailboxes and parcel boxes.





# Linking Budget and Strategy

Successful long-term organizational sustainability requires planning and a strategic planning process that identifies vital and measurable goals. Identified priorities have been pulled out of our mission, vision, and values and act as the guiding principles for Association decisions and actions taken by both the Board and staff. These identified priorities are the overarching strategies and values that will help us reach our shared vision.

## **2022 Budget Highlights by Strategic Plan Goal Areas**

Funding of key expenditures has been allocated to each Strategic Priority as follows:



# Sustainability

*We strive to be a sustainable community that manages our human, natural, and financial resources to meet current needs while ensuring that these resources are available for future generations.*

- An updated Capital Improvement Plan (CIP) 2023 –2032 is scheduled
- Southern Court Repairs
- Continued implementation of Firewise and Clean Green programs for our membership

*Ecologically, we seek to gain an understanding of our impacts on the watershed and climate, and will promote good stewardship by lessening such impacts wherever we can.*

- Large Culvert or Bridge Inspection (alternating years)
- Design of a required Stormwater Mitigation Project
- Fast Response for Unforeseen Drainage Issues



- Design, remove and replace Culvert 432
- Remove and replace Culvert 25
- Annual vegetation control of ditches, culverts, and swales (per 2016 SGM)

*We conduct our business in a socially and fiscally responsible manner.  
We consider the true costs of our decisions and actions.*

- There is no assessment increase planned for 2022.
- New Level I Reserve Study planned for 2022 to ensure we have a proper maintenance plan for all of our assets and to have a complete understanding of what our assets will cost to maintain over the next 10 – 30 years.



# Collaboration



*We are a collaborative community, and our members are its heart and soul.*

- Defibrillator – replacement

*We continually strive to build collaborative and ethical decision-making into our budgeting and planning processes.*

- All employees will receive a 3% pay increase.
- Golf Enterprise presented a balanced operations budget
- New Maintenance Building/Offices

*We are a compassionate Community where the well-being of everyone is a top priority, and all people and living things are treated with respect.*

- Marina Park / Dog Park



# Natural Beauty

*It is both our duty and, in our self-interest, to be strong guardians of the quality of Sudden Valley's natural environment.*

*We are conscious of the human impacts our community has on our surroundings*

- Barn 8 exterior rehabilitation
- Remove Barn 7 Foundation
- New road mower

*We also recognize the effects our environment has on the lives of our residents and employees.*

- New HVAC unit in Clubhouse



# Recreation

*With our parks, trails, greenspace, pools, lakes, golf course, recreation/ fitness center, and rec programs, the Sudden Valley community enjoys a variety of recreational opportunities.*

- Additional kayak/canoe racks
- Replace Sauna in Barn 8
- 4 new Golf Course mowers
- Ice Barn refurbishment

*Sudden Valley provides recreational opportunities that are accessible and inclusive because we believe all our residents should have access to recreation and leisure opportunities.*

- Connected Trail System Design
- Marina Parking Lot Reconfiguration
- Side-walk alternatives on main roads – phased to coincide with resurfacing



# Civic Engagement

*Through civic participation, our community works together to protect our shared Values.*

- All meetings live streamed and viewable on YouTube, providing our members the ability to participate on their own schedule
- Monthly community newsletter, *The Views*

*Our engaged and informed membership and employees actively contribute to the community decision-making processes.*

- The annual SVCA Community Survey
- Staff meetings / training
- Department Heads and key employee participation in the strategic planning process
- Open-door policy with Board

*Community feedback is embraced and considered, allowing the SVCA Board and management to best meet the needs of the community.*

- SVCA website redesign
- The annual SVCA Community Survey



# Quality of Life

*We value the quality of life in our community and protect it through our relationships, bylaws, policies, and procedures.*

- Barn 8 plumbing system repair
- Clubhouse plumbing system repair
- Collaborate with Whatcom County on required Stormwater Mitigation Project and Stormwater Mitigation Bank, ensuring the SVCA receives additional support from our tax dollars

*Livability (social, economic, ecological) and a sense of belonging are required elements of a sustainable community and a successful, collaborative planning process. Fiscal soundness and prudence enable us to deliver the services and maintain the resources our community needs and desires.*

- The Operational Budget is solid and balanced
- Consistent and on-going support of existing services
- Roads resurfacing and pothole repair



# Diversity & Inclusiveness

*We are a community that values difference and creates a welcoming, inclusive, environment that encourages innovation, increased participation and an elevated sense of community and belonging for all.*

- Diverse recreation opportunities for our multi-generational residents
- Increase the use of graphics, translation tools, and the readability of the SVCA website and eBlasts (Sudden Valley's weekly community update email)



# Guide to Community Planning Part One

*Sudden Valley Community Association*



## 2021 STRATEGIC PLANNING WORKSHOP #1

SVCA Strategic Planning Team

FEB. 28<sup>TH</sup>, 2021



# Acknowledgments

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This community planning guide for the Sudden Valley Community Association would not have been possible without the support of the Sudden Valley community. Your participation and input are sincerely appreciated and gratefully acknowledged. A particular indebtedness and deep appreciation to the following:

Those who developed and supported the new planning framework designed to bring balance to the planning process, and by extension, to the Sudden Valley organization and greater community. Particularly Andrew “AJ” Tischeleder, President of the Sudden Valley Community Association (SVCA), who led this initiative in conjunction with the members of Sudden Valley’s Long-Range Planning Committee (LRPC).

The LRPC who recognized that successful community planning would require involvement and input from all aspects of the Sudden Valley organizational structure, the committee members who provided valuable support, input, and guidance: Andrew “AJ” Tischleder, Brian Cope, Kim Harris, Steffy Jones, Sonia Voldt, Scott Ewbanks, Mike Divolio, Adam Tullis, Richard Henderson, Tye McWilliams, Lore Bendure, Steve Errede, Richard Johnson, and Mike Koidal, the same LRPC members who developed and administered a successful community survey designed to assess the membership’s needs.

The Communications Committee who has actively assisted the LRPC with the survey and planning promotions: Joshua Bowens, Communications Chair, who assisted with the graphic design of the survey promotional material and the questionnaire, Anne Cope, Sunny Palmtag-Fina, and Liz Vidal who were instrumental in promoting the survey and new planning process to the membership.

The SVCA IT manager, Jon Kaer, who was instrumental in producing and monitoring the online survey, and assisting the LRPC with the collation of both the online survey results and the mailed random-sampling results.

The SVCA administrative staff who have provided on-going support, particularly: Rachel Tucker, Lauren Shigley, and Oryx Battiste.

The SVCA Board who prove their commitment to serve the membership by governing in an ethical, transparent, and fiscally responsible manner. The active support of these Board Directors allowed this pivotal moment in Sudden Valley’s history: Andrew “AJ” Tischleder, Joshua Bowens, Steffy Jones, Kim Harris, Justin Bauer, Brian Cope, Joel Dobbins, Andrew Entrikin, Paula Birchler, Linda Bradley, and Noelle Holland.

Interim General Manager, Glenn Akramoff, whose experience helped shaped the strategic planning process and planning workshops.



# *Sudden Valley Community Association*

## **Guide to Community Planning**

### *Part One*

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# Preface

The Sudden Valley Comprehensive Community Planning Guide Part One (the “guidebook”) is designed to be utilized during the initial strategic and comprehensive planning phases of Year-One (the "major review") of the 3-year cyclical planning calendar. If a major review occurs in Year-One, it will not be necessary to repeat the planning steps outlined in Part One in Y2 and Y3 of the 3- year cycle.

## Focus of Guidebook

*The Guidebook is both a reference document and a workbook*

The purpose of the Sudden Valley Community Association (SVCA) Guide to Community Planning (Guidebook) is to provide the membership, volunteers, and staff of the Sudden Valley Community Association (SVCA) with a user-friendly reference guide to the community planning processes. By developing this planning guidebook, members, staff, Department Heads and committee members will all have a consistent process ensuring all resources tie back to the values, mission and outcomes envisioned in the Sudden Valley Comprehensive Community Plan (the "Community Plan").

SVCA is engaging in strategic and long-range planning to ensure that the community's expectations of the Association are being met. Strategic planning is a critical process for articulating a shared vision and building the partnerships that are necessary to achieve common goals. Effective planning is essential for moving collaborative programs forward and for gaining the required membership and other stakeholder support for the successful implementation of the Community Plan.

Part One of this Guidebook provides a summary of the planning framework and process. Part One is primarily intended to introduce the SVCA planning framework and processes and guide the Strategic Planning Team through the process of examining the current Mission and Vision statements, identifying our Core Values, and amending the Mission and Vision Statements, if needed - guiding the next 10-year planning process. Part One should be utilized in Year-One during the Community Plan major review process. If the priority goal setting and action strategies are evaluated and developed for relevancy in Year-One, Year-Two and Year-Three will not require a review of the core values, mission, and vision statements. The Guidebook is to help SVCA generate a comprehensive community plan that is responsive to members needs and sustainable from an economic perspective.

This Guidebook is intended to provide assistance and encouragement to the BOD, the LRPC, other committees and staff as you navigate through the entire community planning process providing the guidance to implement the Community Plan consistently and successfully, and the appropriate strategies that encourage community participation and the formation of collaborations.



# Commitment to Ethical Planning Process

The Planning Team members are asked to acknowledge and adhere to the “Ethical Planning Principles” listed below, which have been adapted from the Ethical Principles in Planning adopted by the American Planning Association Board.

## Ethical Planning Principles Statement

*This statement\* is a guide to ethical conduct for all who participate in the process of planning as advisors, advocates, and decision makers.*

*\*(Adapted from APA Statement)*

This statement is a guide to ethical conduct for all who participate in the process of planning as advisors, advocates, and decision makers. It presents a set of principles to be held in common by appointed and elected officials, and others who participate in the process of planning.

Sudden Valley’s recently adopted planning process exists to serve the best interests of the members and the Association. Planning issues commonly involve a conflict of values and, often, there are private interests at stake. These accentuate the necessity for the highest standards of fairness and honesty among all participants in the planning process, and a conscientiously held view of the policies and actions that best serve the entire community. An ethical judgment often also requires a conscientious balancing of the facts and context of a particular situation and on the entire set of ethical principles.

### **Planning Team members should:**

- Recognize the rights of all SVCA members to participate in the planning process.
- Strive to give SVCA members full, clear and accurate information on planning issues and the opportunity to have a meaningful role in the development of plans and programs.
- Strive to expand choice and opportunity for all residents, recognizing a special responsibility to plan for the needs of disadvantaged groups and persons.
- Assist in the clarification of community goals, objectives and policies in plan-making.
- Ensure that reports, records and any other non-confidential information which is, or will be, available to decision makers is made available to the SVCA membership and staff in a convenient format in advance of any decision;
- Strive to protect the integrity of the natural environment and the heritage of the built environment;
- Pay special attention to the long-range consequences of present actions.
- Exercise fair, honest and independent judgment;
- Make public disclosure of any and all actual or potential benefits or advantages that they, a spouse, family member or person living in their household might directly or indirectly obtain from a planning decision;
- Abstain completely from direct or indirect participation in which such a matter is under deliberation, unless their personal interest has been made a matter of public record and the SVCA Board has expressly authorized their participation;
- Seek no gifts or favors under circumstances in which it might reasonably be inferred that the gifts or favors were intended or expected to influence a participant's objectivity in the planning process;
- Not disclose confidential information acquired in the course of their planning duties;
- Not misrepresent facts or distort information for the purpose of achieving a desired outcome;
- Not participate in any matter unless adequately prepared to render thorough and diligent consideration;
- Respect the rights of all persons and not discriminate against or harass others, adhering to the standards set for in the SVCA Anti-Harassment Policy.

***Sudden Valley encourages members, staff, and volunteers to report suspected unethical behavior.***



# Building on Prior Planning Efforts

The Guidebook recommends a planning process that will build on the prior year's planning effort. It is important that the strategic planning process is iterative and maps a clear path between existing conditions and a vision for the future. Revisiting the strategic plan yearly to review accomplishments against documented goals establishes both a feedback loop that can then influence future planning and decision making, and a basis for performance measurement. The Community Plan must be a working document, requiring ongoing collaborative input and effort by the entire SVCA organizational structure and other relevant stakeholders



# Chapter 1: Introduction to Planning

Local cities and counties, regional organizations, and statewide entities all recognize the need for communities to clearly state their purpose, mission and vision, establishing core values and setting goals for the future. Community planning is the process of coming together to agree on a future direction and gathering momentum to carry it forward. A united community, regardless of size or location, can achieve its goals through building consensus and clearly pursuing a direction that community members support. This is the key to self-sufficiency, self-governance, and sustainability for our community.

Community residents, property owners, staff, and other stakeholders can use this Guidebook to develop a community comprehensive plan. While this Guidebook is focused on developing a comprehensive community plan, the same planning framework, guidelines, and processes should be utilized by all SVCA Departments and Committees to ensure their planning and goals are in alignment with the Community Plan. It is a practical, community-based model for planning that is member driven.

## What is Planning?

Planning is the systematic process of establishing a need and then working out the best way to meet the need, within a strategic framework that enables you to identify priorities and determines your operational principles. Planning means thinking about the future so that you can do something about it now. This doesn't necessarily mean that everything will go according to plan. It probably won't. But if you have planned properly, your ability to adjust, without compromising your overall purpose, will be that much greater.

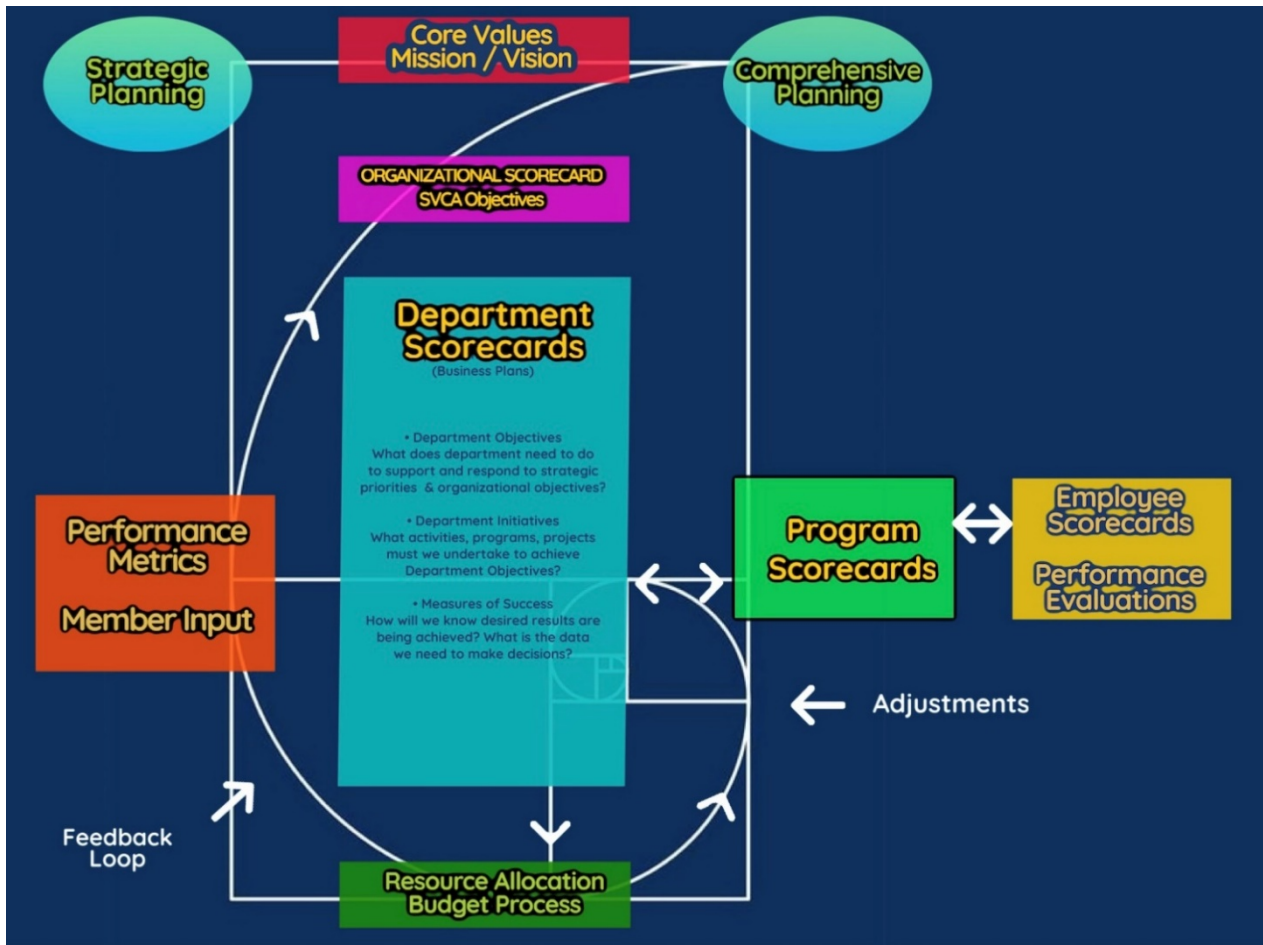
## Why Is Planning Important to the Sudden Valley?

Planning allows available resources to be focused on the actions that will benefit the SVCA and membership the most. Planning provides a coherent guide for day-to-day implementation. Just as each community has a unique set of strengths, weaknesses, opportunities, and challenges, each community should have a unique plan. Solutions need to be developed through collaborative, community-based approaches that involve an expanding leadership base and actively seeks input from all members and other stakeholders. The community planning process needs to look impartially at the past, assess the present, and visualize the desired future, helping the membership, the Board, management, staff, and volunteers, individually and collectively, see where we want to go and make appropriate decisions on how to get there.

Sudden Valley's comprehensive community planning framework has the ability to empower our membership by inviting and encouraging active participation throughout the planning process, creating and maintaining a sense of community and belonging. Planning also ensures resiliency during times of economic challenges, while providing flexibility to take advantage of opportunities or respond to changing needs of the community. Planning also increases our members' and residents' sense of security. A plan helps the membership and the SVCA staff and volunteers, individually and collectively, see where we want to go and make appropriate decisions on how to get there.



# Chapter 2: Sudden Valley Planning Process



In 2020, the SVCA Long-Range Planning Committee (LRPC) began developing the Framework necessary to allow the Association to begin to build consistency throughout the SVCA Organizational Structure, and continuity in the Budget and Planning process. The objective of this effort is to ensure consistent strategic and comprehensive planning processes are implemented Association-wide, not only facilitating coordination with Whatcom County and other agencies but minimizing the influence any one individual or special interest group can have on Sudden Valley's planning processes.

## The SVCA Planning Bodies

### SVCA Members

It is essential that members are involved in developing the Community plan to ensure legitimacy, ownership and commitment to the plan. The Planning Team and membership must build consensus around program priorities. This validates the situation analysis and the priorities identified by the planning team.

### Association Staff

Association Staff provide support and technical expertise throughout all aspects of the planning process.



# The Long-Range Planning Committee

The Long-Range Planning Committee (LRPC) is mandated by the SVCA Bylaws to *“continually maintain a comprehensive, relevant and vital Sudden Valley Community Plan, covering the next three (3), five (5), and ten (10) years, including a formal assessment of community membership needs, with annual updates, and a major review at least every three (3) years.”*

The LRPC determined that the SVCA would be better served with new comprehensive planning framework focused on consistency of planning priorities throughout the SVCA organizational structure. In summary, the LRPC follows the directives outlined in the SVCA Bylaws to deliver an achievable Community Plan and ongoing planning process that supports successful implementation and encourages membership and other stakeholder involvement.

## Planning Task Force

The Planning Task Force (PTF) members are the “Project Managers” of the LRPC, playing a key role in the planning, executing, and monitoring of each phase of the long-range planning process, and ensures milestones and goals set in the 3-yr planning calendar are met or amended when appropriate.

PTF is a standing work group of the LRPC. The PTF will assist and support all work groups, ensuring consistency and alignment in the planning process. The PTF consists of the Chair of LRPC, and a minimum of 2 members and no more than 3. All PTF members are also members of the LRPC.

## Strategic Planning Team

The Strategic Planning Team (Planning Team) guides the strategic planning process, identifies priorities to deliver a planning roadmap. The Planning Team consists of the current members of the SVCA Board and LRPC, and key SVCA management and staff. The Planning Team strategy workshops are not intended to solve every planning problem. Additional work by the planning bodies is necessary to successfully integrate and implement the Planning Team’s priority goals and action strategies community wide.

The Planning Team is responsible for a “Road Map” \* of specific goals, along with detailed objectives of how to achieve the identified goals. The 2021 strategic planning workshops will offer the Planning Team the guidance and tools required to deliver a strategic planning roadmap by the end of Q1 2021.

## Strategic Planning Facilitator

The facilitator manages or the group discussion, the Planning Team participants provide the content. The facilitator has no particular stake or interest in the issues being discussed. The facilitator’s role and sole interest is a successful strategic planning workshop.



# Chapter 3: Comprehensive Planning

Comprehensive Planning identifies priorities such as “Safe Communities”, and “Fiscal Responsibility” to provide a broad umbrella under which all aspects of the SVCA organizational structure can align and contribute. The comprehensive planning process should be informed about and build on goals and action strategies identified in the strategic plan, allowing all activities of the Association to align to the strategic plan, priorities, and goals.

## What Is a Comprehensive Plan?

A comprehensive Community Plan provides a clear record of the community's goals and visions, providing guidance for future decisions. Comprehensive Planning is firmly grounded in assessments of the existing natural, physical, social, and economic conditions of the community. Member input, comments, and support will be gathered at each stage of the planning process, in order to inform the Community, foster leadership, and ensure that the Community Plan is representative of the will of the people. Individual plan elements reflect these inputs and create coordinated directives for the future.

The Community Plan will be an expression of the community's vision for the future, providing a strategic map to reach that vision.

## Comprehensive Planning Framework

The LRPC elected to organize the Community Plan similar to that of the Whatcom County Comprehensive Plan whenever possible. Like Whatcom County's Comprehensive Plan, the fundamental purpose of Sudden Valley's Comprehensive Community Plan is to establish a framework of goals, policies and action items for the more detailed planning and implementation actions which will occur in the near future.

As this is a new planning framework, the LRPC is finalizing a 3-year cyclical planning calendar to ensure a consistent planning and implementation process to successfully deliver the 1, 3, 5, and 10-year components of the Sudden Valley Comprehensive Community Plan as mandated by the SVCA Bylaws.

The planning process encompasses the following Time Horizons:

Near-Term: 1 year horizon - Focuses on operational challenges or specific initiatives

Mid-Term: 1–3-year horizon – Addresses large organizational goals

Long-Term: 3+ years

The key difference between short term planning and long-term planning is that the short-term planning focuses on immediate actions, whereas long term planning focuses on the expected outcome for the projected future. Meeting short term goals contributes to achieving long term objectives.



# Chapter 4: The Plan Elements

## Community Plan Organization and Purpose

After much review and careful examination of Sudden Valley’s past planning practices and the planning directives for the committee outlined in the SVCA Bylaws, the LRPC determined the well- researched approach outlined in the Growth Management Act (GMA) should serve as the guideline for the Sudden Valley planning process where possible and appropriate. This will allow the SVCA to begin to build consistency throughout the SVCA organizational structure, and provide continuity in the Budget and Planning process. Additionally, because SVCA must routinely work with Whatcom County, other Lake Whatcom stakeholders, the LRPC has determined that using similar Comprehensive Planning requirements as outlined in the GMA allows the SVCA to be more consistent and efficient.

The Community Plan Elements will now be organized similar to that of the Whatcom County Comprehensive Plan, as outlined in the GMA, whenever possible. Like Whatcom County’s Comprehensive Plan, the fundamental purpose of Sudden Valley’s Comprehensive Community Plan is to establish a framework of goals, policies and action items for the more detailed planning and implementation actions which will occur in the near future.

**The Growth Management Act (GMA):** A series of state statutes, first adopted in 1990, that requires fast-growing cities and counties to develop a comprehensive plan to manage their community. It is primarily codified under Chapter 36.70A RCW, although it has been amended and added to in several other parts of the RCW.

**Comprehensive Plan:** An integrated policy planning document that is the centerpiece of our community planning and articulates a series of goals, objectives, actions, policies, and standards that are intended to guide day-to-day decisions by elected board members and association staff.

## Elements of the Plan

The Sudden Valley Comprehensive Community Plan will focus on the following elements:





# Community Development

Consists of a public participatory and usually interactive form of town or neighborhood planning and design in which diverse community members / “stakeholders” contribute toward formulation of the goals, objectives, planning, fund/resource identification and direction, planned project implementations and reevaluation of documented local planning policy. It is a logical “bottom-up” evolution of (formerly “top-down”) regional, city and urban planning. At a minimum, it seeks community consensus for proposed allocations of scarce resources among competing demands.

## Land Use

Includes adopted land use designations which combine the predicted needs of future populations with the availability of land and the desires of residents. These needs and desires are expressed through the goals and policies included in the comp plan.

## Housing

The purpose of this housing element is to consider existing housing patterns, projected population growth, and most-likely build-out scenarios to address community needs and desires in realistic ways. The housing element should not only focus on potential build-out but weigh cost of additional services with any increase in revenues and impact on home values, and resident’s quality of life.

*Sudden Valley, CDP census demographic information will be included in this chapter.*

## Facilities

### SVCA-owned Facilities

The purpose of the SVCA facilities element is to guide the SVCA in providing adequate facilities and services for residents within the Association’s financial capability and provides a unifying framework for facilities planning. It also establishes levels of service for certain capital facilities. This chapter includes near and long-term capital improvement projects/programs.

### Third-party Capital Facilities

Under the GMA, planned developments may make use of capital facilities, utilities, and services provided by outside providers, and may enter into agreements with such providers. This chapter will include details of all third-party Capital Facilities located within the boundaries of the SVCA along with any associated agreements.

## Utilities

The purpose of the utilities element is to provide a location for utility specific comprehensive plans prepared by entities other than SVCA. It is the intent of this plan to support utility providers in fulfilling their public service obligations required by state law to provide service on demand to existing and future customers. It is also the intent of this plan to minimize any negative effects resulting from provisions of that service on the residents, infrastructure, and environment of the SVCA.



# Transportation

The purpose of the transportation element is to set goals and priorities for Sudden Valley’s transportation facilities. It inventories current facilities, projects future needs, and guides the planning and implementation of projects and programs to meet those needs. Its overall purpose is to ensure that Sudden Valley’s transportation system continues to allow for the movement of people and goods throughout the boundaries of Sudden Valley in a way that is safe, efficient, environmentally responsible, accessible to all users, and cost effective.

# Economic Development

The purpose of the economic development element is to set goals and establish policies which promote the economic vitality and sustainability of SVCA. These goals and policies should reflect the desires of the membership and ensure property values are not negatively impacted. This chapter will be developed to include analysis of Sudden Valley’s current financial position – looking at businesses, residents, and governance. As a part of this analysis the plan would define all sources of non-dues revenue and explore options to increase our non-dues revenue.

# Parks and Recreation

The primary focus of this chapter is on goals and policies that support parks and recreation facilities, amenities, and programs designed to serve the Sudden Valley community as a whole. The chapter will include historical information on Sudden Valley, Lake Whatcom, and the Lookout Mountain and Stimpson Nature Reserve areas, and Whatcom County’s Comprehensive Parks and Recreation Open Space Plan. Current and projected usage of existing facilities, amenities, and programs will also be addressed. The chapter will outline standards for parks and trails development.

# Environment

This chapter addresses general environmental goals and policies. The chapter will include natural hazards, water resources, and ecosystems, providing the direction necessary to ensure and promote long-term sustainability of the environment in Sudden Valley.

Sudden Valley’s natural environment, its beauty, and its other natural resources, has attracted people to our community for generations. This setting is important to our sense of well-being, to our health, and to our future. Sustaining our natural assets in the face of increasingly intense human activity becomes more difficult each year. The challenge of protecting this environment while accommodating growth not only within Sudden Valley, but in the surrounding areas. It requires maintaining guidelines so that growth does not ultimately overrun the very assets that brought most of us here. The purpose of this chapter is to create such guidelines.

# Planning Policies

This chapter includes SVCA Policies that impact the Community Plan, and City and Countywide Planning Policies (CWPP) impacting Sudden Valley. Planning Policies provide a framework intended to guide the development and implementation of the Community Plan.



# 30-year Reserve Studies

This chapter includes the SVCA Reserve Studies. This is a planning and budgeting tool that includes an inventory of existing facilities and projected 30-year maintenance expenses.

# Capital Improvement Program

The SVCA shall perform its activities and make capital budget decisions in conformity with the Sudden Valley Comprehensive Community Plan.

## SVCA Bylaws - Mandated Focus Areas

- Community Development
- Association Services
- Parks and Recreation
- Infrastructure
- Facilities
- Non-dues revenue
- Policies

**The SVCA mandated planning focus areas will be addressed under the appropriate Element of the Sudden Valley Comprehensive Community Plan.**



# Comprehensive Planning Processes

While the Community Plan will follow the guidelines outlined in the GMA and processes similar to those of Whatcom County, it is important to recognize that as we move along in this new planning framework, we anticipate certain processes and procedures will require amending to better implement the Community Plan.

## Relationship to the Strategic Plan

The Strategic Plan and the Community Plan serve many of the same ideals, but from different perspectives. The Strategic Plan provides a short-term framework for the SVCA to pursue objectives that support high-quality operational outcomes, assisting the Association by setting priority objectives and goals which focus its operational efforts, objectives and goals provide clear action steps that align with the Association's purpose, vision, and the Plan Elements of the Community Plan. While the Comprehensive Plan translates a long-term vision into targeted objectives for overall planning and community development. Both are based on unifying values.

Sudden Valley's comprehensive planning process is developed around the Strategic Plan. The LRPC oversees the development and implementation of the Sudden Valley Comprehensive Community Plan, ensuring membership and relevant stakeholders are involved with developing the plan to ensure legitimacy, ownership and commitment to the plan.



# Chapter 5: Strategic Planning

Strategic planning provides a road map for the SVCA, setting priorities and providing guidance on how best to address the Elements of the Community Plan. Strategic planning also sets action steps and strategies with performance targets so the Planning Team, membership, and staff can track successful achievement of the priority goals identified during the strategy planning sessions.

Strategic planning is also an ongoing operational process, where management continuously reappropriates resources to initiatives that need to be prioritized, and coordinating departments so that they're in sync with the identified strategic goals. It does not spell out specific activities.

Strategy is based on an understanding of the broader context in which the SVCA operates, its strengths and weaknesses, and the issues / problem(s) the planning team has identified.

## The Strategic Planning Process



## Where are we now?

Strategic planning requires we look honestly at where the SVCA and our community is today. What do we do well? What do we do wrong? What can we control? What can't we control that impacts the association?



Strategic planning helps determine priorities and the strategies that are likely to help achieve the identified vision. Strategic planning provides a framework to:

- analyze the external and internal environment of the SVCA (social, political and economic) to aid in the formulation of the vision
- identify the problem or problems which the SVCA believes it is well-placed to address
- reflect on the community's value system in order to create parameters (a frame) for the SVCA's activities
- set priorities
- set goals
- formulate a vision and mission statement
- analyze strengths and weaknesses when addressing identified problems
- identify opportunities and threats in the environment that may impact the Association's ability to achieve its Purpose and Vision
- review strategic options for achieving goals and select the most appropriate
- build the organizational structure accordingly

The values, vision, mission, priorities and goals identified in the strategic planning process form the foundation for SVCA Operational Planning, turning a strategy into implementation.



# Updating the Strategic Plan

Updating a strategic plan involves several crucial steps. Let's break it down!

## 1. Evaluate

- Before you can define where you're going, you need to understand where you are. Evaluate your existing strategy, including the SVCA's Mission, Vision, and Goals.
- Analyze the external environment.

## 2. Look at the Accomplishments

- Reflect on what worked well with the most recent strategic planning process and what didn't. Learn from experiences and adjust the Planning Team's approach accordingly.
- Consider both achievements and areas where improvements are needed.

## 3. Update the Association's Current State

- Take stock of the organization's current situation. What are the SVCA's strengths, weaknesses, opportunities, and threats (SWOT analysis)?
- Understand the Association's finances, operational efficiency, and overall performance.

## 4. Update Goals and Priorities

- Revisit the 2021 Strategic Priorities and identified Goals. What Goals are not achieved? Are they still relevant? Are they achievable?
- Set clear, measurable goals for the next planning cycle. Prioritize them based on their impact and feasibility.

## 5. Define Responsibilities

- Identify roles and responsibilities for executing the updated strategic plan.
- Ensure everyone understands their part in implementing and successfully achieving the Strategic Goals.



# Strategic Planning Worksheets

The Sudden Valley Community Association's strategic planning process involves creating a roadmap to guide the association toward its long-term goals and objectives while ensuring community and financial stability.

The Association's planning model involves the following key components:

1. Sudden Valley's purpose, its mission, the shared vision, and strategic priorities.
2. An internal analysis of the current state of the organization and community, identifying what is working well and any issues preventing the organization from performing efficiently. (Efficiency is the ability to minimize waste while increasing results.)
3. A strategic analysis of the external environment and the opportunities and obstacles existing there.
4. Prioritization tools to identify multi-year goals that align with our Vision and Mission, and strategies to achieve the identified objectives. When reviewing community facilities / amenities and infrastructure sustainability, always consider health and safety and Goal alignment with the SVCA's Purpose.
5. A roadmap of the strategic plan's implementation and timeline.
6. Regular Review and Updating of the Plan. Both Strategic and Long-range Planning planning are ongoing processes. Adapt to changing needs and circumstances to ensure the long-term sustainability and success of the Sudden Valley organization and community.



## OUR STRATEGIC PRIORITIES

Successful long-term organizational sustainability requires a planning process that identifies vital and measurable goals. Sudden Valley's Strategic Priorities are taken from our mission and vision, and act as the guiding principles for Association decisions and actions by both the Board and staff. These identified priorities are the overarching strategies and values that will help us to achieve the Sudden Valley we envision:

**SUSTAINABILITY.** We are a sustainable community, managing our human, natural, and financial capital to meet current needs while ensuring that adequate resources are available for future generations. We conduct our business in a socially and fiscally responsible manner. We consider the true costs of our decisions and actions.

**COLLABORATION.** We are a collaborative community, and our members are its heart and soul. We continually strive to build collaborative and ethical decision-making into our budgeting and planning processes. We are a compassionate Community where the well-being of everyone is a top priority, and all people and living things are treated with respect.

**NATURAL BEAUTY.** It is both our duty and, in our self-interest, to be strong guardians of the quality of Sudden Valley's built and natural environment. We are conscious of the human impacts our community has on our surroundings. We also recognize the effects our natural environment has on the lives of our residents and employees.

**RECREATION.** With our parks, trails, greenspace, pools, lakes, golf course, disc golf course, recreation center, and rec programs, the Sudden Valley community enjoys a variety of recreational opportunities. Sudden Valley provides recreational opportunities that are accessible and inclusive because we believe all our residents should have access to recreation and leisure opportunities.

**CIVIC ENGAGEMENT.** Through civic participation, our community works together to protect our shared Values. Our engaged and informed membership and employees actively contribute to the community decision-making processes. Community feedback is embraced and considered, allowing the SVCA Board and management to best meet the needs of the community.

**QUALITY OF LIFE.** We value the quality of life in our community and protect it through our relationships, bylaws, policies, and procedures. Livability (social, economic, ecological) and a sense of belonging are required elements of a sustainable community and a successful, collaborative planning process. Fiscal soundness and prudence enable us to deliver the services and maintain the resources our community needs and desires.

**DIVERSITY & INCLUSIVENESS.** We are a community that values differences and creates a welcoming, inclusive, environment that encourages innovation, increased participation and an elevated sense of community and belonging for all.



# SWOT Analysis

SWOT analysis interprets the strengths, weaknesses, opportunities, and threats of an organization, and is a highly effective tool when utilized during the strategic planning process.



The success of any analysis depends on the strategic planning team's ability to identify factors that can impact Sudden Valley. The involvement and input of the entire Planning Team is crucial to a credible SWOT analysis. You are a member of Sudden Valley's Strategic Planning Team because of your leadership and/or planning roles. Your ability to offer honest insight as you look across the SVCA organizational structure ensures a SWOT analysis that has the credibility to be used constructively in the strategic planning process.

This is the time for honesty. In order to develop the Strategic Plan and the goals needed to achieve the shared Vision for Sudden Valley, you must be able to identify what the organization and community are doing right, where there is room for improvement, and what should change or stop entirely.

It is important, as a part of the internal focus, to conduct the SWOT analysis prior to completing your draft Strategic Plan. It is a critical part of the risk management process. *Strengths* and *Weaknesses* are your internal factors, and *Opportunities* and *Threats* are the external factors that impact Sudden Valley. By analyzing both internal and external factors, the internal strategies can be strengthened, and the SVCA will be better prepared and responsive to external issues.

## The SWOT Analysis Worksheets

Using your SWOT worksheets, focus on the *Strengths* and *Weaknesses* that come up the most or stand out to you, as these are likely to be the most true and have the greatest impact on the SVCA. And focus your *Opportunities* and *Threats* on those that have the highest potential impact on the Sudden Valley Community Association.



## **Exercise #1: SWOT Analysis Worksheet.**

Here are some questions to ask yourself as you visualize the Sudden Valley Community Association and perform your own SWOT analysis:

### **Strengths**

- What does Sudden Valley do well?
- What unique resources can you draw upon?
- What do the members perceive are Sudden Valley's strengths?
- What do SVCA employees perceive are Sudden Valley's strengths?
- What do non-residents and outside organizations perceive are Sudden Valley's strengths?
- What makes Sudden Valley Unique?

### **Weaknesses**

- What could Sudden Valley do better?
- What should Sudden Valley change or stop?
- What are people outside of Sudden Valley likely to perceive as our weaknesses?
- What factors cause the SVCA to lose non-dues related revenue?
- What factors cause the SVCA members to feel disenfranchised?
- What factors cause the SVCA to lose staff?
- What factors cause the SVCA to lose volunteers?

### **Opportunities**

- What potential opportunities have you identified that may be beneficial to the SVCA?
- What interesting trends are you aware of?
- What are other similar communities doing?
- Useful opportunities can come from such things as:
  - Changes in technology and markets on both, broad and narrow scales.
  - Changes in government policies related to your field.
  - Changes in social patterns, population profiles, lifestyle changes, and so on.
- Local events.

### **Threats**

- What obstacles does Sudden Valley face?
- Are quality standards, compliance requirements, member needs, or services changing?
- Is changing technology a concern?
- What are the limitations on revenue-producing opportunities?



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**ASSETS AND STRENGTHS:**  
what we do well

Strengths

**AREAS FOR IMPROVEMENT:**  
challenges, resource limitations

Weaknesses

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**OPPORTUNITIES:**  
emerging needs, new trends

Opportunities

**ISSUES AND CONCERNS:**  
obstacles, laws, changing attitudes

Threats



# Top Three GOALS Worksheet

Strategic GOALS are a critical part of the Strategic Planning Process. A GOAL is what you want to have achieved at the end of the 3-year Plan.

Thinking of the each **Strategic Priorities**, identify 3 GOALS you would like the SVCA to achieve within the next 3 years.

## SUSTAINABILITY

- 1.
- 2.
- 3.

## COLLABORATION

- 1.
- 2.
- 3.

## NATURAL BEAUTY

- 1.
- 2.
- 3.



# Top Three GOALS Worksheet

## RECREATION

- 1.
- 2.
- 3.

## CIVIC ENGAGEMENT

- 1.
- 2.
- 3.

## QUALITY OF LIFE

- 1.
- 2.
- 3.



# Top Three GOALS Worksheet

**DIVERSITY &  
INCLUSIVENESS**

1.

2.

3.



Ensure each Goal is **SMART**  
and **CARES** about Sudden Valley's core values

