



# **PCVA PROPERTY**

# **STRATEGIC PLAN**

## **2020-2025**

SEPTEMBER 2019

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**Version 1.0**

**Updated September 18, 2019**

**Approved September 24, 2019**

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# Pine Creek Village Association

## Property Strategic Plan

This six-year Strategic Plan documents and guides the objectives of the Pine Creek Village Association (PCVA) Board of Directors in the planning and execution its Real-Property Fiduciary Duties to the Homeowners of PCVA.

As a living document, this Strategic Plan provides *PCVA Homeowners* an outline of the objectives and tasks required by the Association for the maintenance and improvements to the real property owned jointly by the Homeowners of PCVA.

As a guide, this Strategic Plan provides the changing membership of the *PCVA Board* a reference regarding the agreed-to objectives and necessary spending to fulfill its duties in the oversight of the Association.

This Strategic Plan was prepared and is maintained by the PCVA Grounds Committee in its advisory role to the Board.

PCVA Board of Directors

***The Goal of the PCVA Board of Directors is to ensure Pine Creek Village Homeowners retain the quality of life and enhanced property values provided by the Association through thoughtful and responsible management, budgeting, contracting, and spending using Homeowner Assessments.***

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## Areas Covered by the Strategic Plan

### Real Property

**Steel Fences.** The Association owns several linear miles of steel “view” fencing within and on the perimeter of Pine Creek Village. Occasional spot repair and recurring maintenance is required to ensure the maximum life and appearance of this fencing. Replacement of fencing is a reserve item, but recurring maintenance is generally an annual budget expense.

**Wood Fences.** The Association owns thousands of feet of wood fencing within and on the perimeter of Pine Creek Village. Occasional spot repair and recurring maintenance is required to ensure the maximum life and appearance of this fencing. Replacement of fencing is a reserve item, but recurring maintenance is generally an annual budget expense.

**Stucco Walls.** The Association owns several linear miles of stucco walls within and on the perimeter of Pine Creek Village. Occasional spot repair and recurring maintenance is required to ensure the maximum life and appearance of the walls. Replacement of stucco walls is a reserve item, but recurring maintenance is generally an annual budget expense.

**Sidewalks.** The Association owns several linear miles of sidewalks within and on the perimeter of Pine Creek Village. Repairs of sidewalks are as needed, with replacement of larger areas done only when age and condition make large-scale repairs necessary. Replacement of sidewalks is a reserve item due to their expected long life and high cost; repairs are generally a budgeted maintenance expense.

**Electrical Systems.** Electrical systems within the Association feed power to lights on monuments and at mailbox enclosures. Those same systems provide power to irrigation controllers and park structures. Repairs are as needed, but there isn’t a way to “maintain” the buried electrical system in order to extend its life. Major

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replacement of buried cable is a reserve item, but solar alternatives are appropriate, were possible.

Mailbox Enclosures. Mailbox enclosures are repaired as required and receive routine maintenance to extend life.

Irrigation Systems. Irrigation systems are repaired as necessary; maintenance includes periodic (required) checks of backflow components and adjustment, updates, or replacement of irrigation controllers. Irrigation systems are a reserve item, since major replacement of buried supply lines could be a large expense.

Neighborhood and Entry Monuments. Monuments include hardscape, electrical, and landscaping components. Hardscape and electrical systems are repaired as needed; landscaping is a part of the Association landscaping plan.

Driveways. There are three shared driveways maintained by the Association, with special assessments of the homeowners served by those driveways. Repair of driveways are as-needed, with routine maintenance (sealing) done based on the evaluation of an expert. Sealing and replacement are a reserve expense (a separate reserve for each driveway).

Private Neighborhood Park. The private neighborhood park includes sidewalks, landscaping, irrigation, and electrical (all separate elements within this Plan). Additionally, the Private Park includes shelter structures, playground equipment, tables and benches. Repairs of those elements will be as-needed, with recurring maintenance unique to each element. The reserve includes the unique equipment at the Private Park.

Entry Park (Briargate Blvd and Chapel Hills Dr). The “Entry Park” includes two monuments and a large landscaped area. Associated electrical, irrigation, and landscaping will all be documented within those areas.

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## **Landscaping**

PCVA Monuments

Neighborhood Monuments

Street Islands (cul de sacs and lane dividers)

Trees

Planted areas

Natural areas

Turf areas

Briargate Boulevard (PCVA maintained but city owned)

Chapel Hills Drive (PCVA maintained but city owned)

Royal Pine Drive (PCVA maintained but city owned)

Drainage Ponds

## **Contracts**

Painting

Tree maintenance

Landscape maintenance

Landscape upgrade

Electrical

Fence repair

Wall repair

Concrete repair

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## ACTIONS REQUIRED FOR SUCCESS

**1) Pre-qualify vendors and contractors.** PCVA must seek out and pre-qualify interested contractors, and maintain that list over time. In order for PCVA to transmit a Request For Proposal (RFP), a list of appropriate pre-qualified companies must be available. Many small companies would be interested in doing work for the association, but might not be able to meet the requirements of the Association on short notice (in order to make a timely Proposal). By communicating with vendors/contractors, sharing the insurance, compliance and billing requirements, and giving time for the company to establish a relationship with Hammersmith, PCVA can take advantage of available small business for many of the smaller and/or short-term tasks. PCVA needs a list of:

- Landscape contractors for modifications and xeriscape upgrades
- Electrical contractors
- Fence repair companies able to properly repair steel fence and wood fence
- Concrete repair contractors
- Stucco repair and maintenance contractors
- Playground equipment maintenance companies
- Painting contractors for steel and wood fence

**2) Catalog PCVA Property.** In order to schedule and track recurring maintenance, as well as oversee landscape upgrades, the Association needs a list of every maintainable piece of property. Linear systems, such as fences, walls, and sidewalks, should be divided into identifiable lengths or units. The catalog should include:

- Separate lengths of steel fence, including unique location description
- Separate lengths of wood fence, including unique location description
- Separate lengths of stucco wall, including unique location description
- Monuments
- Islands
- Mailboxes
- Landscape areas, including the type of landscaping and qualification for upgrade
- Park property and equipment

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**3) Recurring maintenance schedule.** The Association needs a schedule of (ideally) equal maintenance tasks for each type of property [equal to smooth the annual budget for each system]. The schedule would apply maintenance to each Association asset at the appropriate schedule for that asset. The schedule would include:

- Steel Fences
- Wood Fences
- Stucco Walls
- Mailboxes
- Park structures
- Playground equipment
- Private driveways

**4) Landscape upgrade and maintenance priorities.** The Association needs a prioritized list of landscape upgrades and maintenance to enable RFPs at the appropriate time. This list would draw from the catalog, and should be long enough to extend beyond one budget year.

- Prioritized Landscape Upgrade List

**5) Tree maintenance and replacement.** The Association needs to identify and track trees needing care, trees needing removal, absent trees (that have been removed), and trees proposed for installation. The installation list should be sufficient to allow spring planting for one budget year. Removed trees should be added to the “absent tree” list.

- “Sick tree” list
- Tree removal list, to include follow-on stump removal
- Absent tree list
- Tree Installation list (location by the Association, species selection by arborist).

**6) PCVA Landscaping Contract “maintenance.”** The Grounds Committee and Board should track Landscaper success, questions, and shortfalls that can be corrected by a contract clarification, change or replacement.

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## 2019 End-Of-Year/2020 Pre-Season Goals and Actions

**Goal 1--December 31, 2019:** Establish a pool of pre-qualified contractors.

**Action 1.** The Board will work with Hammersmith in soliciting potential contractors in the categories described in the previous section. The pool must be created prior to sending RFPs for 2020 work.

**Goal 2—November 30, 2019:** Identify recurring maintenance items for 2020 contracts.

**Action 2.** The Committee will complete the *PCVA Property Catalog and Recurring Maintenance Schedule* sufficient to identify items for maintenance in 2020.

**Goal 3—December 31, 2019:** Prepare RFPs for 2020 recurring maintenance items

**Action 3.** The committee will draft RFPs for all 2020 recurring maintenance items and present to the Board for approval.

**Goal 4—December 31, 2019:** Draft RFP for PCVA Landscaping Contract

**Action 4.** The committee will work with available experts in drafting a Request for Proposal, a Contract, and Proposal evaluation guidelines for PCVA Landscaping. The RFP will be presented to the Board for approval.

**Goal 5—January 31, 2020:** Draft RFP for PCVA landscape improvement

**Action 5.** The committee will complete the *PCVA Property Catalog* sufficient to create the *Landscape Upgrade List* to identify and rank landscape improvement sections for 2020. The committee will then draft an RFP for those improvements and present it to the Board for approval.

**Goal 6—January 31, 2020:** Draft RFP for PCVA tree replacement

**Action 6.** The committee will create the *Absent Tree List* for attachment to an RFP for tree replacement and present the RFP for Board approval. The committee will also draft the *Tree Installation List* and prioritize the locations (not shared in the RFP). The RFP will require the contractor to propose a species and price for each location, and that information will populate the prioritized *Tree Installation List* and establish the plantings for 2020 based on available funds.



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## 2020 Goals and Actions

2020 will recover from 2019, complete the support documentation, establish a new Landscaping Contract, and lay out the cycle for following years.

**Recovery.** 2019 included a change in Grounds Committee membership and loss of continuity, clarification of Board guidelines for the Grounds Committee, a major storm that damaged many trees within the Association, and an extension—rather than replacement—of the PCVA Landscaping Contract. Additionally, many modifications and xeriscape upgrades were not completed, requiring 2020 to include delayed 2019 work.

**Goal 1—Early 2020:** Evaluate proposals and recommend contractors to the Board

**Action 1.** Late 2019 actions will generate several proposals to the Association. The committee will review each and transmit recommendations to the Board.

**Goal 2—March 30, 2020:** Complete PCVA Property Catalog

**Action 2.** The Committee will complete the PCVA Property Catalog

**Goal 3—Throughout 2020:** Complete and/or update required lists

**Action 3.** The Committee will complete and/or update the following lists:

- Sick Tree List
- Tree Removal List
- Absent Tree List
- Landscape Upgrade List

**Goal 4—Early 2020:** Complete the Recurring Maintenance Schedule

**Action 4.** The Committee will establish the schedule for touch-maintenance on all PCVA property. Items identified for 2020 action should be placed on an RFP or maintenance task

**Goal 5—Late 2020:** Prepare RFPs for 2021

**Action 5.** The Committee will examine upgrade and maintenance lists and draft RFPs for approval by the Board.

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## 2021 Goals and Actions

**Assessment.** The Committee will evaluate 2020, reconfirm or adjust goals for 2021 and beyond, make corrections to Landscaper guidelines (adjust contract, if necessary), and map out 2021 efforts.

**Goal 1—Early 2021:** Evaluate proposals and recommend contractors to the Board

**Action 1.** Late 2020 work will generate several proposals to the Association. The committee will review each and transmit recommendations to the Board.

**Goal 2—March 30, 2021:** Update PCVA Property Catalog and Strategic Plan

**Action 2.** The Committee will update the PCVA Property Catalog and 6-year Strategic Plan.

**Goal 3—Throughout 2021:** Update required lists

**Action 3.** The Committee will update the following lists:

- Sick Tree List
- Tree Removal List
- Absent Tree List
- Tree Replacement List
- Landscape Upgrade List

**Goal 4—Early 2021:** Complete the Recurring Maintenance Schedule

**Action 4.** The Committee will review (and update) the schedule for touch-maintenance on all PCVA property. Items identified for 2021 action should be placed on an RFP or maintenance task

**Goal 5—Late 2021:** Prepare RFPs for 2022

**Action 5.** The Committee will compare upgrade and maintenance lists and draft RFPs for approval by the Board.

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## 2022 Goals and Actions

**Assessment.** The Committee will evaluate 2021, reconfirm or adjust goals for 2022 and beyond, make corrections to Landscaper guidelines (adjust contract, if necessary), and map out 2022 efforts.

**Goal 1—Early 2022:** Evaluate proposals and recommend contractors to the Board

**Action 1.** Late 2021 work will generate several proposals to the Association. The committee will review each and transmit recommendations to the Board.

**Goal 2—March 30, 2022:** Update PCVA Property Catalog and Strategic Plan

**Action 2.** The Committee will update the PCVA Property Catalog and 6-year Strategic Plan.

**Goal 3—Throughout 2022:** Update required lists

**Action 3.** The Committee will update the following lists:

- Sick Tree List
- Tree Removal List
- Absent Tree List
- Tree Replacement List
- Landscape Upgrade List

**Goal 4—Early 2022:** Complete the Recurring Maintenance Schedule

**Action 4.** The Committee will review (and update) the schedule for touch-maintenance on all PCVA property. Items identified for 2022 action should be placed on an RFP or maintenance task

**Goal 5—Late 2022:** Prepare RFPs for 2023

**Action 5.** The Committee will compare upgrade and maintenance lists and draft RFPs for approval by the Board.

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## 2023 Goals and Actions

**Assessment.** The Committee will evaluate 2022, reconfirm or adjust goals for 2023 and beyond, make corrections to Landscaper guidelines (adjust contract, if necessary), and map out 2023 efforts.

**Goal 1—Early 2023:** Evaluate proposals and recommend contractors to the Board

**Action 1.** Late 2022 work will generate several proposals to the Association. The committee will review each and transmit recommendations to the Board.

**Goal 2—March 30, 2023:** Update PCVA Property Catalog and Strategic Plan

**Action 2.** The Committee will update the PCVA Property Catalog and 6-year Strategic Plan.

**Goal 3—Throughout 2023:** Update required lists

**Action 3.** The Committee will update the following lists:

- Sick Tree List
- Tree Removal List
- Absent Tree List
- Tree Replacement List
- Landscape Upgrade List

**Goal 4—Early 2023:** Complete the Recurring Maintenance Schedule

**Action 4.** The Committee will review (and update) the schedule for touch-maintenance on all PCVA property. Items identified for 2023 action should be placed on an RFP or maintenance task

**Goal 5—Late 2023:** Prepare RFPs for 2024

**Action 5.** The Committee will compare upgrade and maintenance lists and draft RFPs for approval by the Board.

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## 2024 Goals and Actions

**Assessment.** The Committee will evaluate 2023, reconfirm or adjust goals for 2024 and beyond, make corrections to Landscaper guidelines (adjust contract, if necessary), and map out 2024 efforts.

**Goal 1—Early 2024:** Evaluate proposals and recommend contractors to the Board

**Action 1.** Late 2023 work will generate several proposals to the Association. The committee will review each and transmit recommendations to the Board.

**Goal 2—March 30, 2024:** Update PCVA Property Catalog and Strategic Plan

**Action 2.** The Committee will update the PCVA Property Catalog and 6-year Strategic Plan.

**Goal 3—Throughout 2024:** Update required lists

**Action 3.** The Committee will update the following lists:

- Sick Tree List
- Absent Tree List
- Tree Replacement List
- Tree Removal List
- Landscape Upgrade List

**Goal 4—Early 2024:** Complete the Recurring Maintenance Schedule

**Action 4.** The Committee will review (and update) the schedule for touch-maintenance on all PCVA property. Items identified for 2024 action should be placed on an RFP or maintenance task

**Goal 5—Late 2024:** Prepare RFPs for 2025

**Action 5.** The Committee will compare upgrade and maintenance lists and draft RFPs for approval by the Board.

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## 2025 Goals and Actions

**Assessment.** The Committee will evaluate 2024, reconfirm or adjust goals for 2025 and beyond, make corrections to Landscaper guidelines (adjust contract, if necessary), and map out 2025 efforts.

**Goal 1—Early 2025:** Evaluate proposals and recommend contractors to the Board

**Action 1.** Late 2024 work will generate several proposals to the Association. The committee will review each and transmit recommendations to the Board.

**Goal 2—March 30, 2025:** Update PCVA Property Catalog and Strategic Plan

**Action 2.** The Committee will update the PCVA Property Catalog and 6-year Strategic Plan.

**Goal 3—Throughout 2025:** Update required lists

**Action 3.** The Committee will update the following lists:

- Sick Tree List
- Absent Tree List
- Tree Replacement List
- Tree Removal List
- Landscape Upgrade List

**Goal 4—Early 2025:** Complete the Recurring Maintenance Schedule

**Action 4.** The Committee will review (and update) the schedule for touch-maintenance on all PCVA property. Items identified for 2025 action should be placed on an RFP or maintenance task

**Goal 5—Late 2025:** Prepare RFPs for 2025

**Action 5.** The Committee will compare upgrade and maintenance lists and draft RFPs for approval by the Board.