

# **SHANNON VALLEY HOMES ASSOCIATION**



## **LONG TERM PLANNING COMMITTEE REPORT**

### **ROLLING MASTER PLAN**

**2004**

Approved by SVHA Board - September 30, 2004  
Approved by SVHA Membership – November 9, 2004

Tim Elliott  
LTPC Chair

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## **EXECUTIVE SUMMARY**

Our neighborhood is where we spend a large percentage of our time, has an impact on who will be our friends, determines where our children attend school, and, for most of us, contains our largest financial investment. So, it seems to make sense to have a “business plan” for how to maximize the use and value of our neighborhood.

The following is Shannon Valley’s 2004 Rolling Master Plan. The Board appointed a committee chairman who formed a committee. The Association’s Membership was surveyed, and input was solicited from the committee and all Association Members. The Committee’s Report was presented to the Board and modified based upon feedback from Board Members. Upon presentation to the Association’s Membership at the Annual Meeting, and upon approval, this Rolling Master Plan should provide a valuable resource for the Association and future Boards, and should be followed until modified in accordance with the procedure outlined below.

The General Recommendations provide instructions and guidelines for each Board to follow. The Specific Recommendations provide suggestions and ideas on how to improve Shannon Valley and address issues identified as most important on the Survey responses. Each Board will determine its One-Year Plan by setting objectives and following a course to implement such objectives.

The Rolling Master Plan is subject to modification and revision pursuant to the outlined planning process that requires study, recommendations, Board approval, and approval at the Annual Meeting of Members.

## **BACKGROUND**

**Legal** Shannon Valley Estates (“SV,” “Shannon Valley,” or “Subdivision”) is a residential community of 561 homes located between College Boulevard and 115<sup>th</sup> Terrace and between Antioch Road and Indian Creek in Overland Park, Kansas. The initial plat for the Subdivision was filed in the office of the Register of Deeds of Johnson County, Kansas on April 12, 1977. A current map of SV is attached as Appendix 1 and can be found at <http://www.shannonvalley.org/maps.htm>.

On August 18, 1977, a Declaration of Restrictions (“Restrictions”) and Homes Association Declaration (“Declaration”) were executed by Shannon Valley Developments for Shannon Valley Estates and filed with the Register of Deeds at Vol. 1259, Page 92.

On March 15, 1979, Amendment 1 to the Declaration of Restrictions and Restated Declarations of Restrictions To Shannon Valley Developments was executed and filed with the Register of Deeds at Vol. 1442, Page 979.

Shannon Valley Homes Association (“SVHA” or “Association”) was incorporated in Kansas on April 16, 1980, and filed with the Register of Deeds. Bylaws were adopted for SVHA on April 30, 1980.

The Bylaws were amended in February of 1988 to provide the Members of the Board of Directors shall be elected annually at the General Meeting for a term of fourteen months serving the last two (2) months of the term as non-voting advisors to the newly elected members of the Board. In February of 1989, the Bylaws were amended to specify the annual meeting of the Membership for the purpose of electing Directors and for the transaction of such other business as may come before the meeting shall be held in the 2<sup>nd</sup> week of the month of November and the day selected shall not be a legal holiday.

On April 4, 1991, an Assignment of Declarant’s Rights and Obligations was executed by Shannon Valley Developments and SVHA, transferring to SVHA all of Shannon Valley Developments’ rights and obligations under the Declaration, and filed with the Register of Deeds at Vol. 3371, Page 692. SVHA is governed by a board of five (5) directors (“Board”), which are elected by the SVHA members each year at the annual meeting in November.

Each member is encouraged to review and be familiar with these documents, which are available at [http://www.shannonvalley.org/pdf/svha\\_bylaws.pdf](http://www.shannonvalley.org/pdf/svha_bylaws.pdf).

**Maximum Annual Assessment** One of the significant challenges facing the Association, and need for advanced planning results from the maximum annual assessment set forth in the Declaration. Section 7(1) of the Declaration authorizes a general fund to enable the Association to exercise the powers, and maintain the improvements and render the services in the Declaration. Section 7(1) states: “The Association may from year to year fix and determine the total amount required in this general fund and may levy and collect an annual assessment **not exceeding \$150.00 for each lot within the district as now or hereafter established.**” (Emphasis added.)

Section 7(2) of the Declaration relates to increases in the annual assessment. The first sentence limits such increase to either 50% or 100% of the \$150.00 maximum annual assessment upon authorization of 51% of the members present at a duly called meeting for that purpose. It appears the only difference between the 50% limitation and the 100% limitation is the insertion of the phrase “which the Association may levy and collect from year to year” in the proviso relating to the 50% limitation. This may imply a “special assessment” of up to \$150.00 may levied, although such an interpretation conflicts with the language quoted above in Section 7(1) relating to the maximum annual assessment of \$150.00.

Section 9 limits the amount the Association may expend within any one year to the total amount of the assessment for that particular year, or any surplus that it may have on hand from previous assessments. The Association is also prohibited from entering into any contracts binding the assessment of any future year except for contracts for utilities.

Section 13 authorizes amendment to the Declaration upon “written consent of the owners of **three-fourths** of the area of the land within the district as then constituted, evidenced by a Declaration duly executed and acknowledged by such owners and recorded in the office of the Register of Deeds of Johnson County, Kansas.” This Section also states: “no right to exceed the maximum annual assessment herein provided for may be given.” Therefore, approval of an amendment by “negative response” does not appear to be authorized, and such amendment, if properly approved, could not raise the maximum annual assessment.

Section 14 authorizes termination of the Declaration “by owners of **two-thirds** of the area then subject thereto executing and acknowledging an appropriate agreement or agreements for that purpose and filing the same for record in the office of the Register of Deeds of Johnson County, Kansas.” In the event a two-thirds majority could be obtained, the Declaration could be terminated and a new declaration could be proposed which does not have a limitation on the maximum annual assessment or a larger limitation. Obviously, there are practical difficulties in obtaining approval of this approach, in addition to the risk of terminating the existing Declaration, and not being able to adopt a new declaration.

**Fiscal Policy** For several years prior to 2000, the annual assessments were insufficient to cover the Association’s operating expenses. This reduced the surplus to an amount that was insufficient to cover certain proposed capital improvement projects such as repair of the tennis court and replacement of trees along College Boulevard. The board recognized at that time that with the rising cost of maintenance and trash services, maintaining the same level of services would eventually exhaust the surplus, and it further anticipated that there would be no way to perform any capital improvements, in view of the \$150.00 maximum annual assessment. Such limit would eventually lead to the reduction of services provided by the Association under the current Declaration, as the optional services will need to be reduced and eliminated; and, eventually, a reduction and elimination of the mandatory services. Obviously, such reduction and elimination of services could lead to negative impact on the aesthetics of Shannon Valley, and values of the properties located in Shannon Valley.

In order to deal with this dilemma, and upon advise of counsel, the Board decided to terminate the trash removal services, which reduced the annual assessment to well below the \$150.00 maximum. Members would then have the option, on an individual basis, to participate in a “purchasing group” managed by the Association, for the provision of trash removal services. Since the Association is able to obtain trash removal services on a much more favorable basis than individuals, most, if not all, of the members have elected to participate in the purchasing

group. The funds collected and disbursed for such purchasing group are accounted for separately, although the billing and bank account are included with the general fund.

Any member could opt not to participate in the trash-removal purchasing group and pay the general fund assessment only and obtain their trash removal services on their own. Although this approach does not necessarily provide a permanent solution, it did provide the Association some room to operate without a deficit, and build a capital improvement surplus over the next several years.

If the Association does make any changes in its fiscal policy, it is reasonable to presume maintenance costs will increase. At some point in time the mandatory obligations of the Association will consume all of the annual general fund assessments, any surplus becomes exhausted, and the limitation on the maximum annual assessment will prohibit the Association from performing its mandatory obligations.

Therefore, it appears necessary to modify the fiscal policy and consider alternatives such as: (i) reduction of non-mandatory services; (ii) cost savings; (iii) non-assessment fundraising; (iv) sale of assets; (v) other approach; or (vi) combination of these alternatives. The sooner we can develop additional cost savings and/or income, the longer time we will have to build a surplus to cushion the impact of the maximum annual assessment.

**Previous Boards** The need for a business plan for the Association has been the topic of discussion for several previous Boards. In August of 2002, the Board held a planning meeting and discussed ideas on how to develop a strong sense of community pride. Various activities and ideas were proposed, and some of them were implemented. It became apparent, however, that a comprehensive plan should be developed, and a separate committee could be more effective than the Board itself to prepare such plan, since the Board members have other responsibilities and commitments, and a separate committee would involve other Association Members.

**Long Term Planning Committee** At SVHA's 2003 Annual Meeting, the Board announced it would be creating a Long Term Planning Committee ("LTPC" or "Committee"). The mission of the LTPC was to study a wide variety of issues including finance, facilities, activities, aesthetics, government and neighbor relations, and other issues important to the vitality of our neighborhood. The Committee's objectives are to develop one-year and five-year rolling plans, that provide continuity and long-term focus, while recognizing the need for flexibility, to be presented to the Board and ultimately, the Association's membership. The Board elected Tim Elliott as Chairman of the LTPC on February 12, 2004, at a Special Meeting.

Board Member and Past President Rich Triola presented a draft proposal at the March 4, 2004, Board Meeting. Such draft proposal provided a synopsis and described an annual process

and proposed composition of the planning committee. It also identified a wide variety of numerous issues that should be addressed by the committee.

### **LTPC MEMBERSHIP & ORGANIZATION**

The Chairman, and others, contacted various homeowners to request their participation on the LTPC, and all SVHA members were invited to participate on SVHA's new website at <http://www.shannonvalley.org>. The Chairman's objective in obtaining members of the LTPC was to compile a working group of homeowners, representing a variety of demographic backgrounds, to participate by attending monthly meetings and provide advice and assistance to the LTPC to realize its mission and objectives.

The LTPC held its Organizational Meeting on April 29, 2004. The Agenda for the Organizational Meeting is attached as Appendix 2, and the Minutes to such meeting are attached as Appendix 3 (<http://www.shannonvalley.org/pdf/LTP%20Meeting%20minutes%204-29-04.pdf>). The Committee discussed various topics, established a meeting schedule, and publish its agendas and minutes on the Association's website.

### **SURVEY**

At the Committee's initial meeting, there was general agreement that a questionnaire or survey would be useful to the Committee in focusing its efforts and developing effective one-year and five-year plans. The primary purposes of the Neighborhood Survey were as follows:

1. Develop neighborhood demographics
2. Identify participation information and areas
3. Identify and prioritize issues

The initial draft of the survey was developed by LTPC member Matthew Elyachar, and reviewed and revised by various Committee members prior to and during the May 20, 2004, meeting. The Agenda for such meeting is attached as Appendix 4, and the Minutes are attached as Appendix 5 and available at <http://www.shannonvalley.org/pdf/LTPC%20Meeting%20minutes%206-24-04.pdf>.

The final version of the Survey was placed on the Association's website the first week of June, and distributed with the Summer Newsletter in mid-June. The Survey is attached as Appendix 6. The newsletter article that related to the Survey is attached as Appendix 7. The Survey and newsletter article are available at <http://www.shannonvalley.org/pdf/nl0604.pdf>.

Approximately 52 surveys were returned by mail, and approximately 62 surveys were returned by e-mail, by July 21, 2004, for a total sample size of 114.

The initial responses were compiled at the Committee's June 24, 2004, meeting. The Agenda for such meeting is attached as Appendix 8, and the Minutes to such meeting are attached as Appendix 9 and available at <http://www.shannonvalley.org/pdf/LTPC%20Meeting%20minutes%206-24-04.pdf>.

**Master Compilation** A Preliminary Master Compilation was prepared and presented to the Board at its July 22, 2004, meeting. A final Master Compilation is attached as Appendix 10 and available at <http://www.shannonvalley.org/pdf/Master%20Compilation.pdf>. The LTPC e-mail distribution list was updated to include those homeowners who had expressed an interest in being included on such list, and the Compilation was distributed to such persons prior to the Committee's July 29, 2004, meeting. The Agenda for such meeting is attached as Appendix 11, and the Minutes to such meeting is attached as Appendix 12 and can be found at <http://www.shannonvalley.org/pdf/LTPC%20Meeting%20minutes%207-29-04.pdf>. The Preliminary Compilation was published on the Association's website on July 30, 2004.

**General Observations** As with any document written by an attorney, there is typically a disclaimer, and this is no exception. With that in mind, the Committee recognizes the Survey was not scientifically designed or administrated. Moreover, responses were submitted by only about 20% of members. However, from a statistical standpoint, this sample size indicates we can be about 95% sure the response percentages fall within about 8 points plus or minus the actual percentages had all members responded. Stated differently, it appears the responses should be interpreted to provide rough indications, with the understanding there is no statistical difference between areas with similar responses.

The primary purposes of Questions 2 and 3 were to identify issues most important to those who responded to the Survey. (An additional survey response was received on August 27, 2004, and is included in the results below.)

Question 2 stated: "What do you like most about living in Shannon Valley? (Please mark as many as you like.)" Ten factors were listed, with space for "other." In other words, the committee was attempting to identify the neighborhood's perceived assets with this question. Nearly all respondents listed "Location" (113). The second factor was "Quality of neighbors and/or neighborhood" (78). Two factors, "School District" and "Proximity to the store(s) you frequent" (69) were tied for third. The fifth factor was "Value of property" (61). "Proximity to work" (46) had the sixth most marks; followed by "Newsletter" (20), "Garage sale (11), "Block captains" (9) and "Holiday events" (8).

Question 3 stated: “What concerns you most? (1=most important, 2=less important, 3=not concerned).” Eighteen factors were listed, with space for “other.” This question was intended to prioritize importance of issues. The most frequent factor marked with a “1” was “Property values” (69). Second was “Rental properties in Shannon Valley” (48). Third was “The quantity and speed of automobile traffic” (47). The fourth item marked most important was “Possible loss of Indian Valley Elementary” (45); followed by “Door to door solicitors” (43) as fifth. The next five were “Vandalism” and “Wastewater treatment facility” (37), “Appearance of property next to College Boulevard” (36), “Quality of road conditions” (32), and “Frequency of Patrolling by police” (30).

So, can we draw any conclusions from this information? If so, what conclusions? Even with a 100% accurate database, different reasonable people can come up with different conclusions. The likelihood of differing opinions would seem to increase with data less than 100% accurate. Therefore, each person reviewing the Compilation is invited to develop his or her own conclusions and share them with future long term planning committees for consideration in developing revisions of the Association's long term plans.

***It is rather safe to say that the Association’s members enjoy the location of the subdivision, and are very concerned with the value of their property. They appreciate their neighbors and the school system, and are concerned with safety and privacy.***

It also appears a significant portion of our neighborhood members are willing to give their time and attention to others. For example, over half of the respondents indicated they and/or their spouses would volunteer to improve Shannon Valley (Questions 4A). The most frequently marked areas to volunteer (Questions 4B) were “Public relations” (29), “Website assistance” (28), “Neighbor assistance” (26), “Furnish treats for neighborhood gatherings” (25), and “Long Term Planning Committee” (20).

As we consider what we can do to improve our neighborhood and address the items identified in the Survey responses, it appears clear that we need to develop ways to encourage *greater interaction between the Association's members*, and *greater participation in Association activities*. With greater interaction and participation, our members will have a deeper feeling of pride and ownership in their properties, the Association, and its property and activities.

With a greater feeling of pride and ownership, Shannon Valley will be an even more desirable place to live. This should translate into strong property values and attract people to live in Shannon Valley, including young families, especially when combined with marketing the various assets of the Association. Attracting young families is important to maintaining and preserving Indian Valley Elementary. A tighter connected community will also provide additional security and safety for the residents of Shannon Valley.

Greater interaction and participation should also provide budgetary relief and assistance in dealing with the anticipated future challenge presented by the \$150 maximum annual assessment discussed above. By focusing on how to develop a sense of community in the neighborhood, and utilizing various resources within the Association to emphasize its assets, this Rolling Master Plan will address the primary concerns of its Members, and provide a course for long-term improvement, security, and stability in Shannon Valley.

**Initial Feedback** As indicated in the Committee's July 29, 2004, minutes, the Committee and Association's Members were invited and encouraged to submit suggestions on how to improve Shannon Valley to the Committee's e-mail address prior to the August Committee meeting. On August 3, 2004, an e-mail message was sent to the LTPC's e-mail list requesting comments, suggestions and feedback for the purpose of preparing the LTPC's report and recommendations. A copy of this e-mail message is attached as Appendix 13. A link to a request for suggestions from the Association's Members was posted on the LTPC website shortly thereafter. A copy of such link is attached as Appendix 14 and available at <http://www.shannonvalley.org/pdf/Shannon%20Valley%20Long%20Term%20Planning%20Committee%20Seeks%20Suggestions.pdf>.

There was discussion on the need to preserve Indian Valley Elementary School and what could be done in that regard. Ideas included:

1. Designation of an Association member to attend and promote Indian Valley at Blue Valley School District meetings and Facilities Usage Planning Committee meetings.
2. Network and coordinate with other neighborhood associations that feed, or may feed Indian Valley.
3. Promote Shannon Valley to real estate agents and others for the purpose of attracting families likely to have young children.
4. Establish and develop a relationship with Indian Valley's principal, Dr. Sportsman.
5. Increase participation in Indian Valley's organizations, including the Parent Teacher Organization ("PTO"), School Based Leadership Council ("SBLC"), Cub Scouts, Girl Scouts, and others.

There was discussion on the topic of a neighborhood swimming pool. Although the survey did not appear to indicate strong support for a pool, there is some interest that may merit further investigation into the anticipated construction and maintenance costs, and whether the Association's property is suitable for a pool. Investigation into whether we could enter into an

arrangement with another neighborhood association for the use of their pool may also be appropriate.

Other areas discussed in response to the August 3<sup>rd</sup> e-mail message included:

1. Modification or transformation of the **tennis courts** into a facility that gets greater use such as a covered picnic area.
2. **Volunteer Neighborhood Service Days** that would provide several benefits, including: (i) property improvement; (ii) social interaction; (iii) setting good examples for our children; and (iv) save money.
3. Restricting and limiting the ability of Members to **rent** their property in the future.
4. Better utilization of **Block Captains**.
5. Monitoring activities of the **wastewater treatment facility**.
6. Enhancement of the **entrances** to the neighborhood.

A copy of the Agenda for the LTPC August Meeting is attached hereto as Appendix 15. On August 26, 2004, the LTPC Chair outlined the sections of the preliminary draft of the LTPC Report. and the Committee discussed the following:

1. Ideas submitted by e-mail since the July meeting.
2. Degree of detail of recommendations.
3. Discussion of the Association's assets in the report.
4. Specific ideas on the items listed in the agenda.
5. Rentals and appearance of property.
6. Rezoning of property next to Indian Valley.
7. Time-frame for submission and revision of the draft of the Report.
8. Opportunity for additional suggestions to be submitted by e-mail for content of the Report.

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2004 Rolling Master Plan  
November 11, 2004

A copy of the Minutes to the August 26, 2004, is attached as Appendix 16 and can be found at [http://www.shannonvalley.org/pdf/ltpc\\_meeting\\_minutes\\_8-26-04.pdf](http://www.shannonvalley.org/pdf/ltpc_meeting_minutes_8-26-04.pdf). An article providing the general observations set forth above and requesting suggestions was distributed to the Association's Membership in the Fall *Shannon Valley Voice*, the Association's quarterly newsletter. A copy of such article is attached as Appendix 17.

**General Conclusions** By focusing on ways to develop a stronger sense of community and encourage greater interaction and participation of the Association's membership, and utilizing various resources within the Association to emphasize its assets, the Rolling Master Plan will address the primary concerns of its Members and provide a roadmap for long term improvement, safety, and stability in our neighborhood.

## SHANNON VALLEY'S ASSETS

There is a tendency to take familiar things for granted. Marketing Shannon Valley promotes strong property values. Therefore, it is important to identify and find ways to appreciate the existing assets of the neighborhood.

**Location** Nearly 100% of the survey responses indicated location as something we like about living in Shannon Valley. This really should not be that surprising when you consider:

1. **Kansas City** is a major metropolitan area with professional sports, arts, recreation, and other attractions. Additional information can be found at <http://www.kansascity.com/>.

2. **Johnson County** lies in the southwest quadrant of the Kansas City Metropolitan area, with a population of nearly half a million people. Even with half of its 500 square miles in agricultural land use, the County still represents roughly one-third of the total real estate value for the entire state of Kansas (<http://www.archibus.com/success/johnsoncounty.htm>). Additional information can be found at <http://www.jocoks.com/>.

3. **Overland Park** is generally considered a well-operated, properly zoned suburban city, with a low rate of crime and adequate supply of City services. Overland Park is usually rated as one of the top cities in which to live by various rating services and publications. Overland Park has the second highest percentage in the country of residents age 25 and over with four-year college degrees ([http://www.fact-index.com/o/ov/overland\\_park\\_kansas.html](http://www.fact-index.com/o/ov/overland_park_kansas.html)). Additional information is available at <http://www.opkansas.org/>.

4. **Blue Valley School District** is considered to one of the best in the nation. See <http://www.bluevalleyk12.org/GI/facts.cfm> for a list of recent accomplishments.

**Indian Valley Elementary** is located adjacent to the Shannon Valley. It currently serves approximately 400 students (K through 5<sup>th</sup> Grade). Indian Valley opened its doors in August of 1982, and additions were added in 1985 and 1995. Its website address is <http://www.bv229.k12.ks.us/IVE/>.



**Oxford Middle School** opened in 1988, and serves approximately 500 students (6<sup>th</sup> through 8<sup>th</sup> Grade). Recognitions are listed at <http://www.bluevalleyk12.org/schools/middle/oxford/> and its website address is <http://www.bv229.k12.ks.us/OMS/>.

**Blue Valley Northwest High School** opened in 1993, and an addition added in 2002-03. Total enrollment is approximately 1500 students (9<sup>th</sup> Grade through Senior). Recognitions are listed at <http://www.bluevalleyk12.org/schools/high/bvnwhs/> and its website address is <http://www.bv229.k12.ks.us/BVNW/>. BVNW was built with a capacity range of 1,600 to 1,800 students with a total of 77 classrooms. 86 percent of the faculty has advanced degrees above baccalaureate. The athletic facilities include a swimming pool, two practice football fields, two practice soccer fields, one practice softball field, one practice baseball field, two gymnasiums, four tennis courts, one weight room and two varsity locker rooms. The capacities of the facilities include: the gym (1,600), commons (430), performing arts centers (806) and the stadium (4,000-5,000).



Shannon Valley is close to many outstanding **private schools** and **Johnson County Community College** (<http://www.johnco.cc.ks.us/home/index.php>).

5. Shannon Valley is very close to nearly every type of **retail store**, including Shannon Valley Shopping Center, Corporate Woods Shopping Center, and Highland Plaza.

6. Shannon Valley is surrounded by a variety of churches, banks, and nearly every type of commonly used **services** such as medical, dental, legal, insurance, and real estate.

7. We have immediate access to **four-lane divided highways** in all directions.

8. Many properties have aesthetic elevated **views** of Corporate Woods buildings and Johnson County Community College.

**Facilities** A variety of athletic and other facilities are locate in or very close to Shannon Valley, including:

1. Basketball
2. Tennis
3. Hiking
4. Roller Blade
5. Bicycling
6. Softball/Baseball
7. Soccer
8. Football
9. Roller Hockey
10. Bowling
11. Play grounds



12. Entrances
13. Picnic grounds
14. Two Parks
15. Indian Creek
16. 23 cul-de-sacs and many homes with walkout lots.
17. Most properties are aesthetically pleasing and properly maintained.



***Personnel*** As indicated above, the responses to Questions 4A and 4B of the Survey indicates over half of the respondents were willing to volunteer to improve Shannon Valley. The demographic information harvested by the Survey indicated a wide variety of areas of employment. Shannon Valley has always had people willing to volunteer a substantial amount of time to serve on the Board and in various officer positions over the years.

***The LTPC believes a key to implementing this Rolling Master Plan will be accessing the internal resources of Shannon Valley's Members, finding ways to encourage broader participation to enhance our neighborhood, further developing our sense of community, and conserving our financial resources.***

***Legal*** The Homes Association Declaration, Shannon Valley Declaration of Restrictions, Shannon Valley Homes Association, and Shannon Valley Bylaws are assets to the neighborhood, because they provide a mechanism to enforce restrictions on use and appearance of property. As indicated above, these documents are available on the web at [http://www.shannonvalley.org/pdf/svha\\_bylaws.pdf](http://www.shannonvalley.org/pdf/svha_bylaws.pdf).

The purpose of the restrictions is to improve general appearance of the property in Shannon Valley and, ultimately, the value of each Member's property. Subsection 2(a) of Section 6 of the Declaration authorizes the Association to enforce the building restrictions, and the Article 7.1(c) of the Bylaws state the Board has the power to "exercise for the Association all powers, duties and authority vested in or delegated to this Association and not reserved to the Membership by other provisions of these By-Laws, the Articles of Incorporation, the Restrictions of the Declaration."

## GENERAL RECOMMENDATIONS

These General Recommendations represent the substantive structure of this Rolling Master Plan, and should be followed by each Board. The LTPC believes the process of goal setting, implementation, delegation, and communication will greatly increase the Board's effectiveness.

**Goal Setting** Each Board shall establish its One-Year Plan, with the advice and counsel of the previous Board Members. The LTPC believes it is not realistic to implement all the suggestions in this Report in a one-year period. Rather, each Board should prioritize, establish and publicize its objectives, goals and plans at the beginning of its term as its One-Year Plan. Each Board should then review the extent to which it achieved its objectives, goals and plans at the end of the year, and provide a report outlining suggestions for the next Board. Feedback should be solicited from the Association Membership and discussed at the Annual Meeting.

**Implementation** There was substantial discussion among the LTPC Members on ways to improve the likelihood that a particular board objective would be achieved. In that regard, the following guidelines were developed:

1. There should be adequate **research** prior to setting a possible objective to determine whether it has support among the Association's Membership and is consistent with the then existing Five-Year Plan.
2. If the Board decides to adopt an objective, it should be **stated clearly and publicized** as a stated objective.
3. Investigate and appoint the **best officer or chair** who is qualified, motivated and assumes ownership and responsibility for the project. This decision may very well make the difference between success and failure. The Survey responses should be a great resource for this task, at least for the next few years. For many leaders, however, there will need to be a personal request for assistance, either in person, or by letter or e-mail, outlining the objective and requesting assistance. Simply announcing the position on the website and/or newsletter may not be effective in recruiting the best person for the project.
4. The Board needs to **support the officer's/chair's efforts**.
5. The officer or chair should make reasonable efforts to **recruit interested Association Members** for the project or committee. The President of the Association shall be an *ex officio* (by virtue of the office) member, pursuant to Article IX of the Bylaws, of each such committee.

6. The officer or chair should make reasonable efforts to keep such Members, the Board, and the Association Membership **informed** of their progress. Use of the Association's website can be particularly useful for this purpose.

7. The Board should periodically **evaluate** whether or not the objective is being achieved, and take appropriate action, if necessary, but not micro-manage the project.

8. The officer or chair should be open to **feedback and modification** if additional information developed during the course of the project so indicates.

9. The Association Membership should have an opportunity to **evaluate the success** of the project by reports through newsletter and website.

10. **Recommendations** should be made to the planning committee for purposes of future planning.

11. The participants should receive some type of **recognition** for their time and effort.

We have three (3) examples of recent projects successfully undertaken by our current Board, which essentially followed the above outlined process.

One is the Community Emergency Response Team ("**CERT**"), which was organized by Rich Triola, and mentioned above. Approximately twenty (20) Shannon Valley Residents have received CERT training, and our sense of security is increased because of Rich and these volunteers and their efforts to receive this training. Additional information on CERT can be found at <http://www.shannonvalley.org/cert.htm>.

Another example is the efforts to improve the Association's ability to **communicate** with its Members, and the ability of the Members to communicate with each other. Such efforts include: (i) our new website, [www.shannonvalley.org](http://www.shannonvalley.org), which was developed and is being maintained by Dave Eslinger and Paul Wildgen; and (ii) the development of e-mail address lists from the sign in at the last Annual Meeting, annual registration forms, and (iii) Survey responses. The Board has indicated its commitment to honor the privacy desires of its Members, but the development and use of a comprehensive listing of e-mail addresses can be a valuable tool to improve our neighborhood. This website may also develop into a future revenue source, which is important as we consider ways to deal with the maximum annual assessment discussed above. Over half of the Survey responses were sent over the web and nearly two-thirds of the Survey respondents had visited the website.

The third example is the work of the **LTPC**. At the risk of sounding immodest, the LTPC has already accomplished much with its Survey, exchange of ideas, recommendations, and

involvement of people who want to improve our neighborhood. We believe there will be positive results flowing from the LTPC's efforts, and additional ideas will be developed on how to make Shannon Valley an even better place to live.

**Delegation** It is important to remember that the Board Members serve as volunteers, without any compensation. No Board Member should be expected to devote an extraordinary amount of time to implementing the Board's objectives. Moreover, the size of Shannon Valley, with 562 Members, suggests there should be intermediaries between the Board and Association Members.

The development of enhanced community and neighborhood cohesiveness can be better achieved on a block-by-block level, rather than by the whole neighborhood, because it is more manageable at the block-by-block level. Simply scheduling and holding social events will not be effective if attendance is low. Attendance will probably be low if Members do not anticipate their friends will attend. On the other hand, the likelihood that the event will be a success should increase if Members know their friends will attend.

Properly utilized and motivated Block Captains can fulfill these, and other valuable functions, including development and enhancement of relationships among our immediate neighbors. Strong and active Block Captain Areas should increase attendance and participation in Association events. Block Captain Areas have been determined and many of such Areas already have Block Captains. See Appendix 1 or <http://www.shannonvalley.org/maps.htm> for a map of the Block Captain Areas.

Currently, there are several Block Captain Areas that do not have Block Captains. The LTPC discussed possible reasons people do not volunteer to be Block Captains, including the following:

1. They do not know about Block Captains.
2. They do not know their area does not have a Block Captain.
3. They have not been asked to be a Block Captain.
4. They are reluctant to volunteer because they do not know what to do.
5. They are reluctant to volunteer because they are concerned about the possible time commitment.

Many of these reasons can easily be addressed with newsletter articles, e-mail messages, and web links. A listing of Responsibilities and Other Possible Activities for Block Captains was obtained and attached as Appendix 18. The LTPC suggests the development of a link to a Block Captain website page that provides: (i) a listing of Block Captains, (ii) map of areas, (iii) calendar of activities, (iv) description of successful events; (v) discussion bulletin board; (vi) links to other sites of interest to Block Captains; and (vi) a Block Captain Training Manual.

Such resources should clear up some questions and reluctance of potential volunteers, and a tool to help Block Captains be more effective.

Recruiting and training Block Captains should be an immediate and prime objective of the Board. The responses to Survey Question 4B indicated 20 volunteers for Block Captains. The Survey responses should be reviewed to identify such volunteers, and the Block Captain chair should contact those located in areas in which we currently have no Block Captain. Perhaps a get-acquainted pizza party with the Board would assist in obtaining attendance, and generating excitement and ideas.

The Block Captain should be an inspiration and coordinator for a block to develop an identity or sense of community, which demonstrates to others that we care about our property and each other. The demonstrated sense of community deters crime because it provides notice that we look out for each other and our property. Perhaps some friendly competition would develop between blocks such as which block: (i) has the best holiday decorations; (ii) throws the best party; or (iii) has the best golf foursome. Other ideas include landscaping, flower boxes, matching flags, holiday decorations, progressive dinners, block parties, and others.

The Block Captains can be an important resource for tapping the numerous ways that we can become better friends with our neighbors, and secure the many benefits of developing close relationships with our neighbors. The Block Captain Chair should attend Board Meetings, provide reports to Block Captains, and be a central source of input and communication on what is occurring in the neighborhood.

The Board should consider studying ways to better utilize the Block Captain system. Research on the Internet and discussion with other neighborhood associations may provide proven ideas in this regard. Perhaps the Board should consider a contest for ideas on how to better utilize Block Captains, by offering recognition (website/annual meeting) and/or monetary reward.

The red holiday lights on Grant Street last year was the result of the efforts of a Block Captain. That display appeared to have an immediate impact on the participating block members, and, to some extent, the whole neighborhood.

**Communication** All Association Members should be made to feel welcome to participate in the Association's activities, and should not be discriminated against because of race, age, sex, marital status, duration in Shannon Valley, or any other factor. Secrecy tends to generate mistrust and misunderstandings, neither of which is conducive to building solid relationships.

The message of inclusion should be constant and ongoing for the Board and all task forces and committees, unless a compelling reason exists for acting in an executive session such

as attorney- client communications and personnel matters. An “Open Door Policy” will help remind Association Members of their opportunity and obligation to contribute to their community. As our occupational and family situations change from time to time, so does our availability to make such contributions. Therefore, a Member’s an initial refusal to participate should not be interpreted to mean that the Member will never have any interest in participating in the future.

Involvement in Association projects and activities can have many benefits, including meeting new friends, business networking opportunities, exercise, and others. Active Members should tell others what benefits they have obtained by being better informed and connected to neighborhood activities. It should occur to each member to ask: **“How can I contribute my time and talent to better my neighborhood?”**

The *Shannon Valley Voice*, website, e-mail, and directory are valuable mediums for communication. Each Board should continue to explore and utilize ways to communicate with the Block Captains and the Association’s Members.

One of the most valuable areas of communication will be the feedback from the Board on the results of the One-Year Plan. Such feedback should be provided to the next LTPC and Board Members and officers of the following year, and should provide valuable information for the purpose of improving the Rolling Master Plan.

## **SPECIFIC RECOMMENDATIONS**

In addition to the General Recommendations set forth above, a portion of the LTPC, including its Chair, believes it is important to provide specific ideas for the Board and others to consider. When, and even whether, to implement these Specific Recommendations should be a decision of the Board in planning its annual objectives and developing its One-Year Plan as discussed above. However, we see value in presenting some ideas for future discussion, and as an aid to develop other ideas for future Long Term Planning Committees and Boards. We have roughly categorized these suggestions according to function.

**Annual Board Objectives** Immediately after the election of the Board of Directors at the annual meeting in November, the Board should elect its officers in accordance with Section 8.2 of the Bylaws. The President should review the current version of the Rolling Master Plan, consult with the Directors who served on the previous Board during their two-month “lame duck” period, and propose to the Board at the next Board Meeting what objectives from the Rolling Master Plan it should place on its **One-Year Plan**. The Board should then establish its One-Year Plan and publicize it on the web and in the newsletter.

The Board should **not establish objectives that are not included in the Rolling Master Plan**, unless there are exceptional circumstances. Such objectives should be referred to the LTPC to study for the purpose of including them on the next Rolling Master Plan. This is important in order for the Rolling Master Plan concept to be effective.

**Facilities Maintenance** Facilities maintenance represents approximately **one-half of the Association’s budget**, excluding the trash-removal purchasing group. Therefore, considerable attention should be devoted to area, and ideas explored in regard to possible improvements on how Shannon Valley maintains its common and easement property.

Probably the most obvious suggestion developed by the Survey responses is to revitalize the **Gardening Club** and give them the right and resources to maintain the Grant and 115<sup>th</sup> Street entrances. As with any objective, the LTPC recommends the Board to appoint an interested and motivated chair to recruit, organize, and take ownership in the program, and thereby ensure its success. In response to Question 4B, 18 Members indicated a willingness to volunteer for landscaping, and in response to Question 5, 29 indicated an interest in Gardening Club. (See Appendix 10 or <http://www.shannonvalley.org/pdf/Master%20Compilation.pdf> for the Master Compilation.) If organized properly, the Association should save about \$1,500 per year, minus cost of materials, and would have better maintained and more attractive entrances. The Garden Club could also assume the responsibility of maintaining the beds along Antioch. This could save in excess of \$3,000 per year, minus cost of materials.

Another cost savings opportunity would be to investigate not maintaining the **grassy area north of the sports court**, since this is City property, not Association property. The trees along Grant and lower level of this property make it less apparent, and this expense is nearly \$2,000 per year. A copy of Grounds Maintenance Comparison is attached as Appendix 19.

As mentioned above, **Volunteer Neighborhood Service Days** would provide several benefits, including: (i) property improvement; (ii) social interaction; (iii) setting good examples for our children; and (iv) cost savings. Many Members have expressed interest to the LTPC in participating in volunteer workdays to improve the appearance of our neighborhood.

Since our days of good weather are limited, the LTPC suggests we schedule a **“trial neighborhood service day”** for Saturday, October 2, 2004, starting at 8:00 a.m. The primary focus of this project would be to trim the dead limbs off the bottom few feet of the junipers trees on College Boulevard, trim trees, and rake the rocks under the junipers. About the only expense would be trash bags, refreshments, and the expense associated with the hauling of debris. Appropriate safety measures and equipment would be utilized, and there would be no material impact to the buffer created by the junipers for the adjoining properties. The LTPC Chair will volunteer to head up this initial trial workday. The newsletter article relating to the trial neighborhood service day is attached as Appendix 20 and flyer with the details and sign-up sheet is attached as Appendix 21. If successful, the Board may wish to consider appointing a **Service Day Chair** to report to the office in charge of Grounds Maintenance.

**Capital Improvements** In response to Question 4B, 8 volunteered for **designing, architecture and planning future amenities**, 17 volunteered to make phone calls to volunteers, and 16 volunteered to offer their field of expertise toward making improvements at Shannon Valley. Therefore, the Survey responses would appear to be a wonderful resource for utilizing volunteers to analyze potential capital improvements.

Most everyone believes the **tennis courts** are not being utilized very much, and only about a half dozen Members even have keys. Although Vern Koeppen, our Vice President of Grounds Maintenance, has made temporary repairs to the Courts, they are in need of permanent repair. Due to the lack of funding, the Association does not appear to be in a position to make any major modifications to this property at this time. Consideration should be given to removing the lock to encourage greater use of this facility.

Probably the most controversial issue regarding capital improvements to the Subdivision is whether or not Shannon Valley should have a **swimming pool**. As indicated above, Question 3 of the Survey inquired: “What concerns you most?” Item J states: “No swimming pool is available.” (See Appendix 10, Question 3.J) Twenty-two (22) respondents marked “most important,” nineteen (19) marked “less important,” forty-one (41) marked “not concerned,” and five (5) made checkmarks for this item. If the checkmarks are counted as “most important” only

31% of the respondents indicated this is a high priority at this time. Almost half of the respondents (47%) indicated they were “not concerned” that no pool was available. Of the eighteen (18) items listed in Question 3, only six (6) of such items had fewer marks in the “most important” category, even with the checkmarks counted as “most important.” Again, although reasonable minds can interpret this data differently, this appears to indicate a rather low level of current interest in developing a swimming pool.

Factors **in favor** of a neighborhood pool include: (i) attracting families with children; (ii) helping to retain Indian Valley; (iii) developing community within the neighborhood; (iv) possible increase in home values, depending on the financing mechanism; and (v) possibly others. Factors **against** a neighborhood pool include: (i) initial costs in view of the maximum annual assessment (Declaration, Section 7) and prohibition on borrowing (Declaration, Section 9) mentioned above; (ii) maintenance costs in view of the maximum annual assessment; (iii) utilization by a portion of the membership; (iv) proximity of Tomahawk Ridge Aquatic Center [https://www.opkansas.org/ Res/Parks\\_ & Recreation/Places/Pool/trac.cfm](https://www.opkansas.org/Res/Parks_&Recreation/Places/Pool/trac.cfm); (v) possible negative impact on home values, depending on the financing mechanism, and (vi) possibly others.

The **LTPC is not making any recommendation** at this time on whether or not Shannon Valley should have a pool. However, a pool does not appear to be feasible at this time due to apparent lack of interest, lack of cost information, lack of surplus, and limits presented by Sections 7 and 9 of the Declaration. Should a future board determine to make investigation of a pool a priority, additional study should be conducted on these, and other, issues, and a specific proposal developed for consideration.

In that regard and in regard to any proposed capital improvement, it would seem appropriate to utilize **volunteer resources** in Shannon Valley to develop ideas, cost estimates, anticipated utilization of various alternative uses. This would involve a task force or study committee to research potential alternative uses, reviewing the Survey responses for volunteers with the appropriate fields of expertise, obtaining advice and cost information from such persons, and developing specific proposals for consideration by the Board and Membership. Of course, funding would most likely be an issue, so a plan would need to be developed to address funding.

Another area of potential capital improvements would be the replacement and/or addition of the **entrance monuments**. Again, it would seem appropriate to find out what interest and resources we have internally, before employing outside contractors.

**Social** Further enhancing participation in neighborhood social activities appears to be a key to developing a sense of community and neighborhood cohesiveness. In that regard, the social program should be **communicated** to the Association’s Members in as many ways as

possible, including the website, newsletter, signs, word-of-mouth, Block Captains, e-mail messages, and even phone calls. In addition, social page should be added to the Associations website and periodically updated.

The existing social events, including Easter Egg Hunt, 4<sup>th</sup> of July Parade, and Octoberfest should be continued, and other events should be investigated. However, as indicated above the LTPC believes that simply scheduling more social events will not necessarily be effective. Identifying, motivating, and training the right **Block Captains** should go a long way toward making the social program more successful. The Board may want to consider and publicize some type of budget and/or contest for block parties, if it has not already, to encourage neighborhood block parties.

Question 5 of the Survey attempts to identify interest in various social activities. The Board may wish to solicit and appoint a person in each activity to **personally contact** the persons who have indicated an interest, and develop a social program for that activity. Again, the website and e-mail lists can be valuable mediums to communicate information on activities and events.

The two activities with the **highest responses** were Royals/Chiefs game (60), and dinner club (40). Other activities with high interest were golf tourney (34), gardening club (29), aerobics/exercise (29), biking/hiking/roller blade (29), Bunco (28), Monday Night Football (21) (Chiefs play Baltimore on October 4, 2004, and New England on November 22, 2004), bowling league (20), and softball team (16).

Perhaps a tailgate/tent party to watch a Chiefs game on a big screen on the tennis courts, with refreshments, would be successful. There appears to be continued interest in Octoberfest with neighboring Associations, and a wine tasting event. A home tour or lawn tour could be a fun event. Any of these ideas could even be used as fundraisers for the neighborhood or other worthy cause.

The possibilities are endless, but the likelihood of success seems to depend on:

1. Commitment from the Board.
2. Recruiting and appointing a chair.
3. Adequate communication.
4. Identifying interested persons.
5. Promotion of the event.
6. Recognition.
7. Feedback.

The LTPC believes further development of a viable social program is an **important element** toward addressing the goal of developing an increased sense of community and greater participation of the Association's Members.

**Communication** The primary **existing mediums** for communication in Shannon Valley appear to be the following:

1. The Shannon Valley Newsletter, *The Shannon Valley Voice*
2. The Shannon Valley Website, [www.shannonvalley.org](http://www.shannonvalley.org).
3. E-mail lists:
  - a. Shannon Valley Membership
  - b. Shannon Valley Board
  - c. LTPC
4. Shannon Valley Directory
5. Mail
6. Signs
7. Block Captains and word-of-mouth
8. Phone calls

Advances in **technology** allow us to communicate more efficiently and effectively. The responses to Question 7B of the Survey indicates over 96% of the respondents indicated they have an e-mail account that they access regularly. Nearly two-thirds of the respondents indicated they had visited [www.shannonvalley.org](http://www.shannonvalley.org). Twenty-eight respondents volunteered to provide website assistance (Question 4B).

The question here seems to be “**How can we make better use of existing and future technology?**” One way would be to encourage all Members to disclose their e-mail addresses. Perhaps the Board should look at adopting a written privacy policy to provide assurance that such addresses will not be sold or used for purposes other than Association communications. Perhaps each Member should receive his or her own shannonvalley.org address. In any event, e-mail and the website are currently rather instant and very low cost forms of communication, which can be useful tools to meet Association goals.

As indicated above, the **current Board's focus on communication**, and efforts of Paul Wildgen and Dave Eslinger, have produced significant and meaningful results. Publication of the Association's legal documents, calendars, agendas, and minutes are all ways to keep the Membership better informed. It is believed that publication of liens probably assists in collection of assessments.

The website can also be a great way to **recognize** Members, whether they are winning a Seasonal Home Award, scholarship pageant, Board Member, officer, committee chair, or other contributor.

Question 7C inquired whether the respondent would be interested in helping to **reduce SVHA's costs** by receiving newsletters via e-mail instead of hard copy. Over 75% of respondents answered "yes." Obviously, this is another potential area for costs savings, and the LTPC recommends that the Board continue to support harvesting of e-mail addresses and permission to save costs using such e-mail addresses.

The website should not be overlooked as a **potential income source**. Although there is currently a sponsor page, further study may be appropriate on how to get more sponsors to participate. Ultimately, any advertising revenue will depend on frequency of activity, which depends on the quality and freshness of the content. Nearly half of the Survey respondents indicated interest in using or participating in a vendor list or cooperative buying arrangement for home and lawn services (Question 6). This may lend itself to the development of additional income. Therefore, it would appear additional focus on how to develop income from the website may be an appropriate Board objective.

**Additional e-mail lists** should be developed for Block Captains, individual blocks, and each committee or task force. There should probably be research on whether the Shannon Valley directory should be placed on line.

We must keep in mind, however, that nearly half of the Surveys returned were distributed with the newsletter. Therefore, it appears a large portion of our neighborhood is not relying totally on electronic communication. So, at least at this time, **traditional communication means should continue** to be used so such persons are not excluded. Efforts should be made to encourage broad participation in development of content for the newsletter.

**Marketing** As indicated above, the Survey respondents were most concerned with **property values** (Question 3). The basic economical law of supply and demand indicates prices will increase if demand exceeds supply. As also indicated above, the likelihood of keeping **Indian Valley Elementary** open increases if Shannon Valley and surrounding neighborhoods are able to attract families with young children. Therefore, it appears the Association, and its members, have a vested interest in marketing Shannon Valley to potential purchasers of property in our neighborhood.

The obvious way to market Shannon Valley is to make it **aesthetically pleasing**. This includes proper maintenance of the common ground, facilities, individual properties, and surrounding area. Additional discussion on ways to enhance appearance of individual properties

appears below. Perhaps a call to the City would get new paint on the metal railing on the bridge of College Boulevard, or at least permission for a workgroup to paint such railing.

Development of a **multi-media presentation**, available on the web, would appear to have substantial value in promoting Shannon Valley's assets and people. Efforts would need to be made to inform real estate agents of the existence of such presentation, and it would need to be kept up to date. But it could probably be done internally, without significant expense.

Likewise, a **commercial locator service**, which identifies various retail and services in the area, would appear to have value, both to Members and potential purchasers. Perhaps the Board should see if anyone would be willing to design a logo, for use on the web and possibly in other places. In any event, there are numerous other ways to market Shannon Valley, and perhaps the Board may want to appoint a Member to be responsible for investigating and implementing our marketing efforts.

**Individual Property Maintenance** This was another topic that received considerable discussion from the LTPC Members, and is vitally **important** to maintaining all of our property values. Although there is general agreement that individual property maintenance is very important, there was disagreement on how to accomplish such objective. Some members were advocating review and modification of the Bylaws to strengthen the restrictions, and a more aggressive approach to enforcement. Others, believe voluntary compliance due to pride of ownership will produce better results.

Probably the best approach is a combination, where the vast majority of Members maintain their property because they understand it is **in their own best interest**. For those members who, because of health and/or finances, are unable to maintain their property, perhaps a volunteer **Property Assistance Bureau** would be appropriate. After all, 26 Survey respondents volunteered in response to Question 4B that they would be interested in "neighbor assistance."

For those properties where the owner or occupier are able, but not willing to provide adequate maintenance of their properties, the **restrictions enforcement** route may be necessary. However, due to the expense of legal action to enforce restrictions, the LTPC recommends exhausting alternative means, including notification and City codes enforcement.

Another idea for enhancing individual properties includes obtaining and publishing **sample landscaping plans**. This could probably be done internally, without substantial expense, or through the Gardening Club. Additional suggestions are discussed above under General Recommendations, Delegation section.

The LTPC believes the Board should investigate **prohibiting or restricting owners from renting their property in the future**. Forty-eight (48) of the Survey respondents

indicated gave top priority to rental properties in response to Question 3. This was the second highest item to receive a “1 - most important” response. We have obtained the documents from another Association that has done so, and it appears it could possibly be done by amending the Bylaws pursuant to Article XIV, 14.1 by two-thirds of a quorum of Members present in person or by proxy at a regular or special meeting of the Members. An amendment of the Homes Association Declaration may be required for such restrictions to be enforceable, and this would require written consent of the owners of three-fourths of the area of the land within the District as then constituted, pursuant to Section 13. Additional legal research would be necessary in order to obtain a better opinion on whether the amendment to the Bylaws would be sufficient.

The **Seasonal Home Award** should be continued and expanded to the Block Captain Areas. Perhaps the Association should develop signs or markers for Block Seasonal Awards, with the Block winners eligible for the Association Award.

**Health and Safety** Another very important topic is maintaining and improving the health and the safety of Shannon Valley’s residents. Number 1’s were assigned in response to **Survey** Questions 3 for “Quantity and speed of automobile traffic” (47), “Vandalism” (37), and “Quality of road conditions (32).

Shannon Valley is better prepared for a natural disaster or terrorist attack due to the largest Community Emergency Response Team (“**CERT**”) in Johnson County. Additional information on CERT can be found at <http://www.shannonvalley.org/cert.htm>. Shannon Valley’s involvement in the CERT program should be continued and enhanced.

The Association should continue to have a **Health and Safety** officer with the duties to recruit, inform and maintain the CERT program, and other duties relating to health and safety, and coordinate with Government Relations, School Relations, and Public Relations on such matters.

**Budget and Fiscal Policy** As indicated above, the \$150 maximum annual assessment, and prohibition on borrowing set forth in the Declarations present significant **challenges** and merit further planning.

The LTPC favors development of a **surplus or capital reserve** through cost-savings and reasonable dues increases, to provide additional options for capital improvements and a “security blanket” for the future. The LTPC believes the Association it is certainly reasonable to add \$5,000 to \$10,000 each year to surplus.

As further indicated above, it appears Shannon Valley’s **fiscal policy will need to be modified** and alternatives considered such as: (i) reduction of non-mandatory services; (ii) cost savings; (iii) non-assessment fundraising; (iv) sale of assets; (v) other approach; or (vi)

combination of these alternatives. The sooner we can develop additional cost savings and/or income, the longer time we will have to build a surplus to cushion the impact of the maximum annual assessment.

Additional **suggestions** relating to finances:

1. The Annual Budget should be **publicized** on the Association's website.
2. The treasurer should implement recommendations from the **annual audit** required pursuant to Section 8.8(d) of the Bylaws.
3. An amount equal to the **pro-rata assessment** due to the increase in fiscal year from moving the due date for assessments to June 1 should be added to each annual assessment, since it will cover a period greater than one year during the transition period. This change was made in view of Section 7(3) of the Declaration. Article XV of the Bylaws should be amended to reflect a fiscal year of the Association of June 1 to May 31.
4. Continue **collection efforts** and utilization of trash suspension, liens, and lawsuits to collect assessments.
5. Specify in the **assessment notice** that the Member will be deemed to have elected to participate for a full year in the Trash-Removal Purchasing Group unless such Member provides written notice of their election not to participate prior to the due date of such assessment, and evidence of an arrangement for disposal of trash.

**School Relations** As indicated above, the Survey responses indicated retention of Indian Valley Elementary was a major concern, and believed to be important to maintaining property values. Libby Hayes has agreed to act as liaison between the LTPC and Indian Valley and gather information on how to increase communication between the school and the Association, and work on ways the Association can benefit the school.

In addition, the LTPC believes we should have a person with the responsibility to:

1. Attend Blue Valley School District and Facilities Usage Planning Committee **meetings** to promote Indian Valley, and keep the Association apprised of material decisions.
2. Network and coordinate with **other neighborhood associations** that feed, or may feed Indian Valley.
3. Coordinate with **marketing efforts** to promote Shannon Valley to real estate agents and others for the purpose of attracting families likely to have young children.

4. Establish and develop a relationship with **Indian Valley's principal**, Dr. Sportsman.

5. Promote increased participation in **Indian Valley's organizations**, including the Parent Teacher Organization ("PTO"), School Based Leadership Council ("SBLC"), Cub Scouts, Girl Scouts, and others.

Similar activities and responsibilities should be maintained for Oxford Middle School and Blue Valley Northwest High School.

**Government Relations** Shannon Valley has traditionally had a Vice President/Political Liaison in charge of governmental relations. Street maintenance, the waste treatment plant, Indian Creek, crime prevention, and others are important areas that deserve attention. Therefore, the Association should continue to have a **Government Relations officer**. However, such officer does not necessarily need to be a Vice President.

Possible activities and responsibilities for such officer include:

1. Monitoring activities and decisions of **planning committee and City Council** and reporting on governmental matters that may have an impact on Shannon Valley.

2. Investigating, reporting and accessing **resources** available from government sources to assist in the development and maintenance of strong neighborhoods. A few of such resources are found at <http://www.opkansas.org/Res/Neighborhoods/index.cfm>. An example is the Heartland Area Neighborhood Development Symposium ("H.A.N.D.S.") (<http://www.marc.org/hands/>.)

3. Investigation and participation in **Neighborhood Watch and Crime Prevention Program**. ([http://www.opkansas.org/Res/Neighborhoods/Assistance\\_&Resources/nwatch.cfm](http://www.opkansas.org/Res/Neighborhoods/Assistance_&Resources/nwatch.cfm)).

4. Investigation and participation in the **Neighborhood Conservation Program**. ([http://www.opkansas.org/Res/Neighborhoods/Neighborhood\\_Preservation/Neighborhood\\_Conservation/index.cfm](http://www.opkansas.org/Res/Neighborhoods/Neighborhood_Preservation/Neighborhood_Conservation/index.cfm).)

5. Investigation and participation in the **Neighborhood Preservation Program**. ([http://www.opkansas.org/Res/Neighborhoods/Neighborhood\\_Preservation/index.cfm](http://www.opkansas.org/Res/Neighborhoods/Neighborhood_Preservation/index.cfm).)

6. Monitoring **other governmental matters** that may have an impact on Shannon Valley.

**Public Relations** An officer should be in charge of public relations between the Subdivision and the public. This person could be responsible for the **marketing** Shannon Valley as discussed above. Possible ideas for the officer could include issuing press releases about the Neighbor Assistance Program, working with other neighborhood associations, working with scouting organizations, coordination of school and government concerns, etc.

**Board Composition** Although the Board Members are elected each year, a **succession program** would appear to provide additional stability and consistency to the Association. The Vice President should ordinarily become the President the next year (provided he or she is re-elected to the Board) and should be involved and very familiar with the Rolling Master Plan and planning process in order to make recommendations to the Board the following year for the One-Year Plan.

Prior to the Annual Meeting, the Board should encourage Members to express an interest in participating as Board Members via the newsletter, web, phone calls, and personal letters. Section 5.1 of the Bylaws provides for a **Nominating Committee**, with the Chairman being a Board Member and two or more Members of the Association. Interested persons should contact the Administrative Assistant prior to the meeting of the Nominating Committee. Nomination can also be made from the floor at the Annual Meeting. Secret written ballots for Board Members should be used at the Annual Meeting pursuant to Section 5.2 of the Bylaws.

Persons who indicated an interest in serving on the Board but were not elected should be **recruited** as officers. Involvement in the LTPC, or other objective established by the Board could provide a rewarding opportunity for that person to contribute to Shannon Valley.

**Youth Involvement** Although the Association is not a youth organization, the youth are a vital component of our neighborhood. **Recognizing and including youth** could have many potential benefits, including teaching responsibility, what it is like to be a good neighbor, service hours, and income opportunities. We should maintain and expand the lists for childcare, lawn mowing, snow shoveling, house sitting, pet care, etc. This may be a good area for further investigation and study.

**Recognition of Volunteers and Contributors** We need to continue to recognize those who contribute to Shannon Valley, including Board Members, officers, and other volunteers, in all forms of communication. A simple “**Thank You**” can be a powerful motivator. On the other hand, a failure to provide recognition has the opposite effect. For example, if the Annual Meeting degenerate into a complaint session, who would want to volunteer their efforts and be subject to abuse? Reasonable minds can differ, but simply disagreeing with the volunteer does not diminish their effort.

Serving the Association should be viewed as a position of **honor and respect**. This will attract Members to contribute their time and talent. A sufficient number of volunteers will not only enhance the effectiveness of the Association, it will also make each task more manageable. There are plenty of possible positions, and each Member should feel an obligation to do their part. Perhaps a Long Time Service Award, or other type of recognition should be considered.

**Recommendations to Planning Committee** As indicated under Communications in General Recommendations above, one of the most valuable areas of communication will be the **feedback** from the Board on the results of the One-Year Plan. Such feedback should be provided to the next LTPC and Board Members and officers of the following year, and should provide valuable information for the purpose of improving the Rolling Master Plan.

### **CONCLUSION**

The General Recommendations provide a framework for the Board to effectively address the concerns of the Association's Members. The Specific Recommendations provide a roadmap of ideas for the Board to determine its impact on improving our neighborhood.

The LTPC believes this Rolling Master Plan will enhance our community, assist our volunteers, and ultimately, be used as a tool to enrich our lives.

## APPENDIXES

1. Block Captain Map
2. LTPC Organizational Meeting Agenda, April 29, 2004
3. LTPC Organizational Meeting Minutes, April 29, 2004
4. LTPC Meeting Agenda, May 20, 2004
5. LTPC Meeting Minutes, May 20, 2004
6. Long Term Planning Committee Neighborhood Survey
7. Summer *Shannon Valley Voice* newsletter article from the LTPC
8. LTPC Meeting Agenda, June 24, 2004
9. LTPC Meeting Minutes, June 24, 2004
10. Neighborhood Survey Master Compilation
11. LTPC Meeting Agenda, July 29, 2004
12. LTPC Meeting Minutes, July 29, 2004
13. E-mail message to the LTPC e-mail list of August 3, 2004
14. Web link requesting suggestions
15. LTPC Meeting Agenda, August 26, 2004
16. LTPC Meeting Minutes, August 26, 2004
17. Fall *Shannon Valley Voice* newsletter article from the LTPC
18. List of Suggestions for Block Captains
19. 2004 Grounds Maintenance Comparison
20. Fall *Shannon Valley Voice* newsletter article and flyer on the Neighborhood Service Day