

VISION, MISSION AND CORE VALUES

Approved by Del Mesa Carmel's Board of Directors

On 2/27/2020, the Board approved the Strategic Planning Committee (SPC) as an ad hoc committee, their Charter for 1 year and appointed Patti & Tom Mallett as co-chairs. The Committee consists of 20 members (Board of Directors, General Manager, co-chairs and 10 additional members). Per the Charter, the purpose of the Strategic Planning Committee is to establish the core values, vision, mission and strategic plan (the "Plan") for Del Mesa Carmel in collaboration with the Board of Directors and other Stakeholders.

In conjunction with the governing documents: Declaration (CC&R's), Bylaws and Ground Rules, the core values, vision, mission and Plan provide the direction and pillars for Del Mesa Carmel (DMC).

Throughout 2020, SPC met 10 times (meeting/Zoom information was posted on the bulletin board), published seven articles and four calendar dates in the Mesa newsletter, and provided minutes in six Vice-President Reports.

PURPOSE OF VISION, MISSION & CORE VALUES:

To provide direction and define expectations for all and explain how DMC expects staff to work. Similar to an orchestra's conductor and baton, the vision, mission and values are the baton for DMC. Senior leaders (Board/GM) are the keepers of the baton and responsible for leading and supporting the vision and mission each day.

Based on 12 months of assessments, SWOT (Strengths, Weaknesses, Opportunities & Threats) analysis, external professional presentations (Insurance, Reserve Study, Business Continuity), realtor surveys (both realtors living in and outside DMC), and sessions facilitated by Marketing & Strategic Planning professionals, SPC has completed the first two steps of the four step Strategic Planning Process.

STRATEGIC PLANNING PROCESS

Completed

1. Strategic Assessment: Where are we now?
 - SWOT Analysis: Strengths, Weaknesses, Opportunities, Threats
 - Value Proposition
2. Values Based Vision and Future Model: Where do we want to be?
 - Vision, Mission, Values and Culture

Not completed

3. Integrated High-Level Plan: How do we get there?
 - Determine goals/objectives and strategies
4. Tactical Planning: Communication, Implementation, and Evaluation

Del Mesa Carmel Community Association, Inc.
VISION, MISSION & CORE VALUES

Effective, January 28, 2021

Del Mesa Carmel Vision

How are we going to be viewed in the world?

To be an innovative aspirational community for the active 55+ of every generation.

Del Mesa Carmel Mission

What are we going to do now and into the future?

We seek to provide the highest level of vibrant living and inspire a strong sense of leadership, pride and responsible homeownership by providing ethical and fiscally responsible solutions, promoting a strong sense of community, focusing on excellence in amenities and activities, and being good stewards of our natural environment.

Del Mesa Carmel Core Values

- **Integrity** - A constant and absolute commitment to trust through honesty and transparency.
- **Accountability** - the obligation of each of us to be realistic, to carry out our mission, and to achieve our vision, day to day and on an ongoing basis.
- **Fiscal Responsibility** – For Del Mesa Carmel and each community member to promote and ensure a strong financial foundation in order to maintain and invest in our shared areas, now and into the future.
- **Community** – We seek to foster an esprit de corps and an enriched quality of life while strengthening the bonds that exist between each of us, built upon trust, stewardship and respect. Our goal is to build meaningful relationships with all those whose lives we touch ... our neighbors, staff, guests, vendors and partners.
- **Environmental Sustainability**— Caring for, optimizing and honoring the abode and our collective surroundings upon which we reside.
- **Safety**- to minimize the risk of danger.