



## **Short Form: PTAA's Mission, Vision and Goals with their Strategies** *revised 1/22/08*

**Identity and Purpose:** The Piedmont Triad Apartment Association (PTAA) is the leading multi-family housing organization serving the Piedmont Triad region. Originally organized by apartment owners and operators, today PTAA constituencies also include Vendor Partners, residents, and the community-at-large. It is an advocate for the industry in local, regional, and national legislative issues. PTAA provides leadership and resources to its members in order to create and operate apartment communities Piedmont Triad residents can trust to meet their housing needs. In concert with AANC and NAA, its principal programs address industry standards and best practices in providing continuing education and professional development.

**Mission:** PTAA brings its constituencies together to improve apartment living in the Piedmont Triad.

**Vision:** PTAA apartment communities will be recognized as quality housing choices and valuable resources throughout the Piedmont Triad.

### **Core Values:**

- Honesty
- Integrity
- Professionalism
- Accountability
- Inclusiveness

### **PTAA Goals with Strategies:**

1. **Advocate** for balanced, practical solutions to issues affecting multi-family communities.
  - A. Anticipate, frame, and help members understand legislative and regulatory issues. Lead in shaping advanced strategies for managing these issues.
  - B. Foster and nurture relationships with governmental officials in all counties served by PTAA.
  - C. Leverage relationships with other organizations with common interests.
  - D. On all issues, pursue a consensus approach by considering the interests of all PTAA constituencies, AANC, and NAA.
2. **Educate** PTAA constituencies\* to embrace the highest standards of professionalism and utilize best practices.
  - A. Provide consistently outstanding programming.
  - B. Create effective venues for sharing experiences and knowledge among industry professionals.
  - C. Advance industry standards, values, and best practices.

- D. Communicate effectively with all constituencies\*.
3. ***Promote*** apartment communities as a preferred choice for Piedmont Triad living and working.
    - A. Convey the value, benefits, and advantages of apartment living.
    - B. Raise public awareness of professional career opportunities in the apartment business.
    - C. Encourage and publicize good corporate citizenship and community involvement.
  4. ***Build*** a mission-centered community of engaged, motivated constituents\*.
    - A. Develop and offer meaningful opportunities to contribute to PTAA's health and well-being.
    - B. Ensure that programming centers on meaningful subjects and topics.
    - C. Provide opportunities for developing vital connections and networking.
    - D. Request and respond to on-going feedback from all constituencies\*.
    - E. Make PTAA enjoyable.
  5. ***Develop***, provide, and be responsible stewards of the resources required to advance PTAA's mission.
    - A. Create an Oversight and Implementation Committee, chaired by the Past President.
    - B. Develop a long-range funding plan.
    - C. Continually strengthen the staff and volunteer leadership of the Association.
    - D. Develop and employ association best practices to enhance the value of PTAA to members.
    - E. Develop and articulate the PTAA brand.
    - F. Respect all levels of volunteer service and recognize that the cycle of volunteer commitment includes rest.
    - G. Appreciate and celebrate volunteers.

\*Owners, Developers, Site and Multi-Site personnel, Vendors, Residents, Community-at-large

## **Long Form: PTAA's Vision, Mission, Goals, Strategies, and Action Items**

*revised 1/22/08*

**Identity and Purpose:** The Piedmont Triad Apartment Association (PTAA) is the leading multi-family housing organization serving the Piedmont Triad region. Originally organized by apartment owners and operators, today PTAA constituencies also include Vendor Partners, residents, and the community-at-large. It is an advocate for the industry in local, regional, and national legislative issues. PTAA provides leadership and resources to its members in order to create and operate apartment communities Piedmont Triad residents can trust to meet their housing needs. In concert with AANC and NAA, its principal programs address industry standards and best practices in providing continuing education and professional development.

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### **Core Values:**

- Honesty
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### **PTAA Goals with Strategies and Action Items:**

#### **1. Advocate for balanced, practical solutions to issues affecting multi-family communities.**

*Rationale: Balanced and practical solutions emerge from an ongoing, proactive, comprehensive public education and lobbying program most commonly called advocacy. Issues can be addressed early, and legislation can be avoided or shaped in the best interest of all constituencies with an association's collective approach.*

- A. Anticipate, frame, and help members understand legislative and regulatory issues. Lead in shaping advanced strategies for managing these issues.
  - i. Annually identify, prioritize, and focus on those issues where our efforts will achieve the greatest impact.
  - ii. Develop an annual member report containing information about local, state, and national legislative efforts and accomplishments and the economic benefits of same.
  - iii. Develop an effective avenue of communicating regularly with owner executives on legislative and regulatory issues and factors impacting our market/local economy.
- B. Foster and nurture relationships with governmental officials in all counties served by PTAA.

- i. Identify and apply those best practices employed in the lobbying efforts of recognized and influential associations.
  - ii. Set regular meetings with elected officials in areas served by PTAA. Ensure that our legislative efforts, including developing relationships, are geographically equitable based on PTAA membership by developing volunteer resources in areas beyond Guilford County.
  - iii. Continue to participate in AANC and NAA legislative activities.
  - iv. Educate elected officials on the cost-benefits and importance of quality multi-family housing.
- C. Leverage relationships with other organizations with common interests.
  - i. Foster voter registration among PTAA members' staff and residents. Educate this base on industry-related issues affecting them. Motivate them to vote accordingly.
  - ii. Determine PTAA's role in TREBIC and its function within PTAA's advocacy strategy.
  - iii. Build on PTAA's leadership position within AANC and its Board of Directors.
  - iv. Ensure that PTAA has engaged and informed delegates at the three major NAA meetings by using pre-conference briefings at a minimum.
  - v. Determine other organizations with which PTAA has common interests and what resources to devote to them.
- D. On issues, pursue a consensus approach by considering the interests of all PTAA constituencies, AANC, and NAA.
  - i. Equip PTAA leaders with consensus building skills.
  - ii. Provide forums for thorough discussion and consensus building on issues where the membership may be divided.
  - iii. Publish those consensus positions promptly.

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**2. Educate PTAA constituencies\* to embrace the highest standards of professionalism and utilize best practices.**

*Rationale: Education is a process of learning, growing and improving in order to best serve owners, community, and residents. Members, who embrace the highest professional standards, not only improve their communities, but their community at large.*

- A. Provide consistently outstanding programming.
  - i. Collaborate with NAA and AANC affiliates and other organizations on joint programs, products, and services to further our ability to meet the educational needs of all multi-family industry professionals.
  - ii. Conduct ongoing evaluations of PTAA's publications, websites, seminars, education, and other resources to ensure their quality and relevancy in meeting the needs of the association members.
  - iii. Identify under-served groups and develop resources to meet their programming needs.
  - iv. Investigate methods of non-traditional delivery of programs.
  - v. Develop, conduct, and evaluate training programs for all those delivering PTAA/NAA curriculum to ensure both the quality and quantity of instructors.
- B. Create effective venues for sharing experiences and knowledge among industry professionals.

- i. Refine PTAA's traditional program of broad industry networking events such as its trade show, golf outing, meal meetings to enhance opportunities for sharing solutions and insights.
  - ii. Develop, conduct, and promote forums and panel discussions which stimulate participant interaction. Expand PTAA'S website capabilities to incorporate items such as, member-submitted articles of interest, question and answer forums and list serves.
- C. Advance industry standards, values and best practices.
  - i. Explore the feasibility of identifying, publishing, and collecting articles on and statements of best practices and industry standards.
  - ii. Develop and promote a code of ethics for PTAA members.
- D. Communicate effectively with all constituencies\*.
  - i. Refine PTAA's publication and develop appropriate delivery methods to meet the needs of its diverse constituencies.
  - ii. Research the effectiveness of PTAA's infrastructure (i.e. professional staff, facilities, equipment, training, seminars, and technology) to ensure it is capable of meeting the requirements of current and future demands.
  - iii. Determining the long-term location of PTAA's office(s) in order to have the greatest positive impact on needs of its members in the most cost-effective manner.

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### **3. Promote apartment communities as a preferred choice for Piedmont Triad living and working.**

*Rationale: We believe that apartment living is the best choice for a significant and growing segment of the Piedmont Triad. We want the public to be informed of the housing options that are available. We want to promote apartment living, not only as one choice, but as a reputable and often preferred choice.*

- A. Convey the value, benefits, and advantages of apartment living.
  - i. Consider developing an apartment industry orientation which equips all new PTAA members to be ambassadors for apartment living.
  - ii. Promote to local governments the advantages of higher density and mixed-use developments which include apartments.
  - iii. Explore the feasibility and the value of having a Parade of Apartment Homes.
  - iv. Research and implement the best marketing opportunities to promote the industry as a whole (e.g.; billboards, radio spots, newspaper ads, op-ed pieces, letters to the editor, website enhancement).
- B. Raise public awareness of professional career opportunities in the apartment business.
  - i. Regularly participate in local job fairs and career days.
  - ii. Encourage local newspapers to commonly profile the apartment industry careers as they do others.
  - iii. Explore the feasibility of a PTAA-sponsored career day or job fair.
- C. Encourage and publicize good corporate citizenship and community involvement.
  - i. Broadly communicate acts of exemplary charity and community involvement within the association.
  - ii. Determine whether PTAA should support multiple charities, a new charity each year, or develop a long-term relationship with a single charity.

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4. ***Build*** a mission-centered community of engaged, motivated constituents\*.

*Rationale: Members of any organization become engaged and motivated if they understand what they are working for and how it benefits them. Work centered on a common mission, vision, set of core values, and plan connects people and calls them to action. This does not happen accidentally. It is a process that builds over time by commitment and deliberation on the part of the leaders of the organization.*

- A. Develop and offer meaningful opportunities to contribute to PTAA's health and well-being.
  - i. Require all committee and Board meetings to have a specific agenda with a brief statement of purpose. Committee chairs will recognize the importance of adhering to the agenda and being respectful of the committee member's time.
  - ii. Require that PTAA's mission be read by Board and committee members at each meeting.
  - iii. All Board and committee members shall be familiar with the strategic plan and will be required to ask themselves, in making any decision, if that decision aligns with the strategic plan.
  - iv. The Board shall perform a quarterly self-evaluation and develop action steps for continued improvement. Semi-annually, the Board shall review the strategic plan and actions, amending the action steps as they deem necessary to meet the goals.
- B. Ensure that programming centers on meaningful subjects and topics.
  - i. Develop a periodic method of surveying PTAA's constituents concerning subject matters of interest.
- C. Provide opportunities for developing vital connections and networking.
  - i. Ensure that every committee publishes and keeps an updated member list with phone numbers and e-mail addresses. Consider using name tags in committee meetings.
  - ii. Allow a brief time at every meeting for social interaction.
  - iii. At larger meetings and events, provide ice-breakers that encourage social interaction.
- D. Request and respond to on-going feedback from all constituencies\*.
  - i. Consider assigning a committee or task force to develop an evaluation plan, ensuring that the evaluations recommended throughout the strategic plan are effective.
  - ii. Develop a standard for evaluations (5 point scale, 10 point scale, open-ended questions, etc.) and develop a method of reporting the results. (What should each report look like? Should there be a standardized format of reporting results?).
  - iii. Execute an annual PTAA-wide survey as part of the annual report.
  - iv. Decide who is responsible for responding to feedback in each instance, and have this clearly written in the evaluation plan.
  - v. Report results and proposed actions in newsletters.
  - vi. Write an Annual Report to Members, part of which will focus on what PTAA has heard from its membership during the year and how PTAA plans to respond.
- E. Make PTAA enjoyable.
  - i. Listen to constituents\*.
  - ii. Encourage personal connections at all meetings, events, and classes.

- iii. Regularly celebrate and thank volunteers.
- iv. Celebrate PTAA's accomplishments.
- v. Respect the time of all volunteers and staff.

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**5. Develop, provide, and be responsible stewards of the resources required to advance PTAA's mission.**

*Rationale: Resources, broadly defined, are required of any organization to realize its purpose. PTAA's mission and plan is ambitious. For the organization to have any hope of succeeding in reaching its goals, human as well as monetary resources are needed.*

- A. Create an Oversight and Implementation Committee, chaired by the Past President, which would:
  - i. recommend to the Board the assignment of each action item to the proper PTAA committee, volunteer, or staff,
  - ii. recommend to the Board the assignment of a realistic time for completion of each action item,
  - iii. monitor and report, at least semi-annually, to the Board on the progress toward each action item, and
  - iv. work with the Board to develop a process by which the Board will begin to oversee the Strategic Plan.
  
- B. Develop a long-range funding plan.
  - i. Develop and track relevant metrics to measure the success of this strategic plan, report quarterly to the Board on those metrics with recommendations as needed.
  - ii. Establish a Finance Committee, chaired by the Treasurer, which would:
    - a. execute item i. above,
    - b. take primary responsibility for reviewing monthly financial statements,
    - c. provide guidance in pricing current PTAA products and services to maximize revenue and continued customer satisfaction,
    - d. recommend dues structures to the Board which reflect the focus of the organization's resources among its various constituencies, and
    - e. design and maintain a detailed budget forecast model for PTAA operations.
  
- C. Continually strengthen the staff and volunteer leadership of the Association.
  - i. The Board of Directors to adopt, as soon as possible, a permanent standing committee called the Governance Committee that would be charged with the broad responsibility of board development. Its primary areas of responsibility would be for:
    - a. board composition, and
    - b. direction on how the board does its work.
  - ii. Consider developing a PTAA Leadership Curriculum which might include:
    - a. free orientations for those new to the owner and/or vendor-partner staff, offering skills & insights needed to enhance the overall value of their membership,

- b. offering a recognized leadership development tool (e.g., Toastmasters International, Dale Carnegie, etc.) which will give members a personal and career development resource and which will enhance PTAA's leadership pool,
    - c. defining a clear path to PTAA leadership,
    - d. develop a written Board orientation, and
    - e. develop a written orientation for committees and workgroups.
  - iii. Evaluate and address strengths and weaknesses of staff through formal and informal training/education.
- D. Develop and employ association best practices to enhance the value of PTAA to its members.
  - i. Continue close relationships and involvement with networks of similarly oriented associations (AANC & NAA and their affiliates, ASAE & AENC and their local members, etc.).
  - ii. Consider deeper involvement by staff in ASAE, perhaps alternating the AE's attendance between NAA's and ASAE's Ed Conf/Exhibition/Trade Show.
  - iii. Consider devoting significant resources to develop PTAA's technological abilities to track, serve, and communicate with members.
- E. Develop and articulate the PTAA brand.
  - i. Identify what differentiates PTAA members from the rest of the multi-family industry.
  - ii. Determine which of these differences could be used to position PTAA strategically within its broadest constituencies\*.
  - iii. Coordinate all PTAA communications and symbols to be consistent with the brand.
  - iv. Consider an advertising or public information campaign which reaches potential and current members with PTAA's strategic position.
- F. Respect all levels of volunteer service and recognize that the cycle of volunteer commitment includes rest.
  - i. Develop strategies to increase the pool of well-equipped volunteers available to PTAA.
  - ii. Consider formalizing term limits on the PTAA Board.
- G. Appreciate and celebrate volunteers.
  - i. Consider developing a formal system of recognition for association volunteers.
  - ii. Consider developing a system of rewarding committee volunteers for participation, (e.g., PTAA Buck\$ which are transferable, dollar-for-dollar discounts for PTAA training).

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## **Oversight and Implementation of the Strategic Plan**

The Board of Directors authorized the development of this strategic plan for the Piedmont Triad Apartment Association. With its adoption of the plan, the Board will assume primary responsibility for overseeing its implementation.

Working under the guidance of a strategic plan will require that the Board regularly review and monitor PTAA's progress toward achieving the plan's five (5) major goals. The Board shall maintain responsibility for oversight of progress on the goals. Work on the plan's strategies and action items will be assigned to committees or sub-committees, and/or staff, in collaboration with the Board of Directors. All groups would report to the Board on progress made toward achievement of the action items.

The strategic plan should be the centerpiece of the Board's and staff's work annually. It should frame PTAA's communication throughout the year. Achievement of particular action items should be communicated throughout the year when appropriate and cited as progress towards carrying out the strategic plan. Review of the plan should be on the agenda of the Board of Directors when goals are set for the year. In recognition of its accountability to the membership of the Piedmont Triad Apartment Association, the Board should make an annual report to the membership, outlining progress toward achieving the plan's goals.

The plan is expected to evolve as PTAA works, accomplishes goals, and sees the future, perhaps differently, in light of achievements and new or shifting needs or priorities. There will be a need for flexibility in implementing the plan. Changes in objectives and strategies are to be expected and should be approved by the Board.

Being guided in mission and work by a strategic plan will require changes in the way PTAA works as an Association - work that will be creative, unifying, and purposeful.

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