

**HERONS GLEN RECREATION DISTRICT
FOCUS GROUPS FOR STRATEGIC PLANNING
JANUARY 14 AND 15, 2014**

FOCUS GROUPS' RECOMMENDATIONS/COMMENTS

There were eight focus groups held on January 14 and 15, 2014 for the purpose of obtaining residents' input on the draft core values, mission statement, vision statement, strengths, weaknesses, key strategic issues and any other general comments on the strategic planning process. The attendance at each group was as follows: Group 1 - 16 on list, 16 attended; Group 2 – 16 on list, 12 attended; Group 3 – 11 on list; 11 attended; Group 4 – 16 on list; 13 attended; Group 5 – 16 on list; 13 attended; Group 6 – 14 on list; 10 attended; Group 7 – 16 on list; 11 attended; Group 8 – 17 on list; 18 attended.

The following report shows the changes or additions suggested by residents for each of those topics (typed in **green bold italics**), and also listed are the other comments made that were related to each topic.

CORE VALUES

- *Providing the best value for our residents at a reasonable cost
- *Honesty & integrity of board & management
- *Financial responsibility
- *Well maintained facilities for all residents to enjoy and encourages an active adult lifestyle
- Friendly, caring community
- Make decisions that best serve the **majority residents**
- A good place to live and work
- Keep up with emerging trends in technology, recreation & social experience
- Transparency/**communication**
- **Employ the best possible management staff**
- **Offer continuing education**
- **Make decisions that enhance property values**
- **Provide a secure & safe community**
- **Provide measurements for core values**

Other Comments on Core Values

- * Must have an evaluation system for measuring staff performance regarding the core values.
- * Need to determine demographics of community.
- * The HOA should have been included in this strategic planning process.

MISSION STATEMENT

- Herons Glen Recreation District is a Florida Special District, **a community** that provides quality recreation, activities, and programs for all residents. We strive to provide **good excellent** financial value and well-maintained facilities to satisfy varied interest groups and **promote healthy** lifestyles.

Other Comments on Mission Statement

- * Many in the groups indicated they did not know exactly what a “Special Florida District” was, and that was explained in each session by the GM.
- * The phrase “provide excellent financial value” is ambivalent.
- * HGRD and HOA should share some responsibilities.
- * How do you measure “quality” in first sentence?

VISION STATEMENT

- Continue to be one of the premier **retirement active adult** communities in Southwest Florida, that provides an excellent value for our **current and future** residents.

Other Comments on Vision Statement

- * There were some comments regarding how to define “premier”.
- * Adding “sound investment” was discussed but it was not added.
- * Shorten both Mission and Vision Statements.
- * The phrase “provides an excellent value” is repetitive as it was also in the Mission Statement.
- * Vision Statement was not necessary as the Mission Statement was enough.

STRENGTHS

- Fiscal soundness & responsibility
- Resident owned common facilities
- Active lifestyle (~~tons~~ *an abundance & variety* of amenities)
- Strong management team
- *Longevity Sustainability* as a viable, well managed community
- *Security & safety*
- *Distance from population centers & retail stores (all groups thought this statement belonged under Strengths rather than where it was, under Weaknesses)*

Other Comments on Strengths

- * Several long-time residents commented that they have seen many positive changes during their years here.
- * “Resident owned common facilities” were explained to mean not developer owned.

WEAKNESSES

- Aging infrastructure
- Limited means for increasing *outside* revenues
- Lack of land for expansion of HGRD activities
- Split management of community
- ~~*Distance from population centers & retail stores (all groups thought this statement belonged under Strengths rather than under Weaknesses)*~~
- *Lack of consistent enforcement of rules*
- *Lack of public transportation*

Other Comments on Weaknesses

- * Good maintenance prevents aging infrastructure to be a weakness.
- * More advertising might increase outside revenues and cooperative efforts between restaurant, golf & tennis could increase both resident and outside revenues.
- * Land expansion might be possible if adjacent farmland could be purchased.
- * Split management of community caused a lot of discussion in every group. Most believe it should be merged as much as legally possible.
- * Lack of enforcement of the speed limit and ignoring stop signs were the biggest complaints about enforcement of rules. Some others were not enforcing the dining room dress code for everyone and abuse of amenities’ rules by outside users or guests.
- * Comments were again made in this category that the HOA should have been included in this strategic planning process.
- * There is too many different communications now coming out from both HGRD & HOA – all that information should be combined together into one issuance.

KEY STRATEGIC ISSUES

- Getting residents *more* involved
- Matching residents’ desires with resources
- Increase revenues from resident and outside sources
- Maintain *and expand* quality facilities, amenities, activities & staff within a value-based budget
- Funding for improvements & projects
- Completion & implementation of the Strategic Plan

- *Continuous review of Policies & Procedures and Rules & Regulations*
- *Develop an overall master plan for amenities*
- *Greater efficiencies between HGRD and HOA*
- *Safety and security*

Other Comments on Key Strategic Issues

- * Have someone at Activities Fair to talk about “Volunteering in Herons Glen”.
- * Board Workshops and Meetings take place during other community activities.
- * Continue to look for cost-saving possibilities, including preventative maintenance.
- * Hire an Activities Director to remove some burden from committees.
- * Lounge is too small for number of residents that would like to attend the Thursday night entertainment; need to add another entertainment night or expand Lounge area which would increase revenue.
- *Re the safety and security issue, entry to Herons Glen through Magnolia Landing is a problem.

GENERAL DISCUSSION

- *Ask specific questions on the survey, e.g., “Do you want horseshoes, basketball court, more bocce courts, etc.?”
- * Find out if HGRD can sell small interest-bearing bonds to residents.
- * Find out if HGRD can generate revenue from recycling.
- *There was a discussion re the golf fees for non-member residents being more than outside member guest fees.
- *Methods for reaching out to possible future residents.
- *Need to communicate importance of survey and also the results of survey to the residents.
- *Need signs on golf course re “Golfers Only, no joggers, dogs, etc.” in order to prevent lawsuits.
- *Need room where ping-pong tables can be permanently set up – they are not used often because they have to be assembled or the room where they are located (Card Room C) is being used for other activities.
- * Many would like to use the pool and spa in the evenings, but currently that is prohibited.
- *Amenities should include activities for both younger and older residents. Some thought there should be activities for visiting children/teen family members.
- *Veterans of the Glen would like to have a count of the number of veterans living in Herons Glen.
- *Some issues are never resolved, e.g., problems with the multi-use path.
- *Town Hall Meeting (Dec. 4) led some to believe that they could list things needed in the community during these Focus Groups, but that was not the case. The response to this statement was that residents can list those items on the survey.
- * There was a comment made that how each of the Board members vote on issues is not made public, and that statement was corrected by advising that person that the Board meeting minutes (on the website) specify how each member voted.
- *And again, under this category, many brought up the issue of needing more coordination between HGRD and HOA.
- *A comment made by many residents at various times during each of the group sessions was: “GM JOSH HALL IS DOING AN EXCELLENT JOB.”

Respectfully submitted,
Mary Ellen Marvin
HGRD Board Assistant