

Pecan Plantation  
Long Range Planning

# Pecan Plantation

## Long Range Planning Document

Prepared by



**CLUB MARK**  
C O R P O R A T I O N

The Membership Marketing Experts

November, 2006

## Table of Contents

<b>The Long Range or Strategic Planning Process .....</b>	<b>4</b>
Key Elements of the Strategic Plan .....	4
Building the Plan... ..	6
Historical Analysis – Examine the Past .....	6
Situation Analysis – Study the Present .....	6
Goal Setting – Designing the Future .....	7
Aligning Goals with community strategies and core strengths .....	7
Plan Summary .....	8
Community Vision .....	8
Critical Success Factors .....	8
SWOT Analysis .....	9
Operational Overview .....	9
Facilities Analysis .....	9
Strategic Community Objectives .....	9
Communications Program .....	9
Member Survey or Focus Groups .....	9
Master Planning .....	10
Financial Plan .....	10
<b>Industry Trends .....</b>	<b>11</b>
Economy .....	11
Growth of the Game of Golf .....	12
Competition .....	13
New Attitudes .....	14
Graying Population .....	15
Summary .....	15
<b>Historical Analysis &amp; Demographic Data .....</b>	<b>17</b>
Community Demographics .....	17
Table 1 – Community Demographics .....	18
Chart 1 – Households by Age .....	19
Chart 2 - Average Annual Income .....	19
Chart 3 – Median Annual Income by Age .....	20
Chart 4 – New House Permits .....	20
Chart 5 – Age of New Buyers .....	21
Chart 6 – Trends in New Buyers by Age .....	21
Chart 7 Golf Rounds – Member Course .....	22
<b>Vision Statement .....</b>	<b>23</b>
<b>Mission Statement .....</b>	<b>26</b>
Mission Statement .....	26
Sample Vision .....	26
Sample Mission .....	26
Sample Core Values .....	26
<b>Focus Group Summaries .....</b>	<b>28</b>
<b>SWOT Analysis Guidelines .....</b>	<b>58</b>

Pecan Plantation  
Long Range Planning

Strength & Weaknesses Evaluation .....	58
Financial Strength .....	58
Operational Strength .....	58
Membership .....	58
Facilities .....	58
Golf Course (s) .....	59
Governance .....	59
Strengths .....	60
Weaknesses .....	61
Opportunities .....	62
Threats .....	63
<b>The Final Document .....</b>	<b>64</b>
Pecan Plantation Strategic Planning Committee .....	64
Suggested Format for Submissions .....	64
SAMPLE SUB-COMMITTEE REPORT – GOLF SUBCOMMITTEE .....	67
General Position Statement .....	67
General Vision Statement .....	67
Summary of Goals .....	67
<b>Worksheets .....</b>	<b>73</b>

## ***The Long Range or Strategic Planning Process***

---

### ***Key Elements of the Strategic Plan***

As Pecan Plantation continues in the direction of creating a Long Range Plan or Strategic Plan, CMC, in the interest of providing it's expertise and experience to the process, has herein provided several sets of guidelines that may be of interest as the process continues.

Strategic planning establishes the direction of the community, adds consistency to the decision-making process, aids in the communication of goals, and provides the "how to's" of achieving the goals.

An effective planning process should achieve the following supporting goals:

- Provide direction.
- Educate and coordinate the General Manager, Board of Directors and key employees on the "Big Picture".
- Ensure continuity and consistency.
- Enhance accountability, clarify expectations and gain commitment.
- Enhance decision-making (for internal and external marketing purposes).
- Organize follow-through.
- Encourage involvement and buy-in of key employees.
- Enhance understanding of value creation.
- Develop long term goals.
- Create a capital plan to achieve your objectives

The plan should consist of some basic elements. Each of these elements is designed to provide key information regarding your community's direction.

#### **Where is Pecan Plantation today?**

You should evaluate the current position of your community and each department within the community to determine where you are today. A SWOT Analysis will determine the strengths, weaknesses, opportunities and threats that exist at Pecan Plantation and in the various departments. Key elements that impact the community's business and ability to succeed will be highlighted. We have provided information generated from an internal analysis and in-depth market study which identifies the demographic make-up of the Pecan Plantation community (Member focus group sessions are also included).

#### **Where is Pecan Plantation going?**

The first key element in determining the direction for Pecan Plantation is your "vision" of success. You must work on a community positioning analysis which will

## Pecan Plantation Long Range Planning

ultimately determine your community's vision statement. This statement should effectively communicate what you are trying to accomplish and become. Elements included in this process are your market positioning, financial goals and desired level of service and quality.

In conjunction with the development of community goals, we should also determine your critical success factors. These are the few things that absolutely must occur in order for your community to achieve success. Critical success factors may be service related, people related, asset related or financial in nature. Typically, a community or department will have no more than a few true critical success factors. These will be key drivers in living the vision that is established through this strategic planning process.

With your community's vision of success and critical success factors clearly identified, you should then begin to formulate your short term and long term goals. These goals should again be aligned with the community's business philosophies, community vision and critical success factors. The goals should be key objectives within the community or departments that will drive success. The list of goals can be as long or short as necessary in each department depending upon the level of improvement desired. Key elements to the development of such goals are that they should be specific, measurable, have a timeline and accountability for their achievement.

### **How will the community get there?**

Once the vision, goals and critical success factors have been established, specific action plans should be developed that will support the effort to achieve your objectives. Each action plan should call for a specific action that supports a specified goal. All action plans should include a timeline. The action plans may need to be modified as we proceed into implementing the plan and should be reviewed regularly.

### **What team do we need to get us there?**

The importance of having the right team in place cannot be overemphasized. This is particularly true for Pecan Plantation as the level of mistrust among some members of the community is extraordinary. While the Long Range Planning Committee is currently populated by only a few members, it might be wise to reexamine the best practices of recreating this Committee to include Sub-Committees to examine various elements or departments within the club or community. In so doing you will be providing a venue for more members to engage in the hard and real data, thus creating consensus building in the process. Key staff must be a part of the Long Range Planning process. These are trained and professional individuals that will see the issues more clearly than the typical volunteer member and whose insights, experience and vision should also be tapped as part of the planning program. CMC

## Pecan Plantation Long Range Planning

would therefore recommend that various Sub-Committees be established in order to involve more of the membership capable of contributing specific areas of expertise and to assist in the consensus building process and to include key staff on each Sub-Committee.

In CMC's experience no plan can be effective without providing the tools for implementation. The final plan must take into consideration the level of service that is appropriate to your community, and staffing requirements to achieve those levels all balanced with your financial abilities and objectives.

### ***Building the Plan...***

#### **Historical Analysis – Examine the Past**

Trends over the past several years have been analyzed with particular emphasis on the most recent five year results. In this facet of planning, you should gain a clear understanding of how successfully the community has met its objectives in the past. Past performance is a predictor for the future only to the extent that we continue to do the same things but expect different results. The past does, however, illustrate trends that the community may want to either continue or change. By gaining a good grasp on historical trends, it can better understand what has caused these trends and what may be necessary to turn those that are not desirable.

- Review historical trends and results
- Review focus group results
- Review member opinion surveys
- Review member usage reports
- Review financial history

#### **Situation Analysis – Study the Present**

With an effective grasp on past performance you can begin to identify the community's current position. This should begin with a SWOT analysis. Another aspect of the situation analysis is to establish the level of satisfaction among the membership. Focus groups, usage trends, absorption rates in real estate and general reaction from your members are among the tools that should be utilized to determine the current level of satisfaction.

In addition, gaining an understanding of the community's future market is vital. Within this document you will find a thorough examination of the demographics of the Pecan Plantation community, a review of industry trends and some important

## Pecan Plantation Long Range Planning

trending information both in terms of usage of current facilities and the demographics of the buyers over the past five years.

It is important to note that the present establishes the foundation for the future and the elements that must be modified in order to produce the desired outcomes, i.e. building what is necessary for both current members and the next generation of community members.

- Study Internal and External Market and the perceptions of the community
- Identify what the community's position within the marketplace
- Identify SWOT Analysis for the community
- Identify Critical Success Factors for the community
- Benchmark and identify key elements of competition
- Establish the level of satisfaction the community is seeking with:
  - Members/Community
  - Employees
  - Financial Partners
- Education on industry and economic conditions
- Complete understanding of your market and future growth of that market

### **Goal Setting – Designing the Future**

- Establish a vision statement for the community
  - Create a clear vision of success understood and communicated to all concerned
  - Ensure that vision is aligned with market demographics and growth expectations, financial responsibilities, member satisfaction, and employee satisfaction
- Create goals that are aligned with the community values
  - Personal integrity and character
  - Member and Guest service quality
  - Develop and implement win-win relationships
  - Strive for continuous growth

### **Aligning Goals with community strategies and core strengths**

- Service
  - Create systems to enhance member recognition and uphold membership values
  - Create pride in the community
  - Know your members and their desires in order to exceed expectations
- Community

## Pecan Plantation Long Range Planning

- Create ambassadors to welcome new community members and create positive perceptions
- Align programming with overall community strategy and timing
- Educate and consistently communicate strategy
- Continuous Growth
  - Align established goals with financial and qualitative expectations
  - Identify areas of technology that can impact community growth
  - Identify new growth and utilization opportunities and create marketing plan to achieve desired results
  - Identify options for the community moving forward relative to governance
  - Identify capital repair and replacement priorities
- Operating Productivity
  - Identify systems and standards for operating productivity
  - Determine whether cost structure enhances member value
  - Identify ways of improving efficiency and effectiveness
- Action Plans
  - Ensure that action plans support specific goals and values
  - Identify ways to ensure quality
  - Identify ways of impacting retention, pride, leadership and membership growth
  - Identify any capital needs and the means to achieve them
  - Identify staffing needs
  - Establish accountability for action plans
  - Establish programming, marketing strategies and timelines

### ***Plan Summary***

In order for the plan to become a live management tool, it must be easily referenced throughout the business cycle. To facilitate this use of the plan, you should develop a summary format including recommendations.

### **Community Vision**

- All perceptions, historical facts and current market position considered in determining community's positioning and vision

### **Critical Success Factors**

- Vital factors identified for community's success



### **SWOT Analysis**

- Each department's strengths, weaknesses, opportunities and threats summarized into Community SWOT

### **Operational Overview**

- Departmental Efficiencies
- Accounting Practices
- Governance

### **Facilities Analysis**

- Capital Plan

### **Strategic Community Objectives**

- Utilization of facilities
- Fee structures for usage
- Competitive analysis
- Demographic analysis – Fitting the programs to the demographic of the community
- Internal usage analysis – Tracking usage
- Profile of membership

### **Communications Program**

- Quarterly State of the Club Meetings
- Annual meetings
- Town Hall / Fireside Chat opportunities

### **Member Survey or Focus Groups**

- Report card of current operations
- Perception of specific facilities and services
- Renovation issues

Pecan Plantation  
Long Range Planning

### **Master Planning**

- Compilation of information from all sources
- Concept of design plan for renovation, if appropriate

### **Financial Plan**

- Means to accomplish goals

## ***Industry Trends***

---

The following is a generic narrative of the overall state of the industry and may or may not have relevance to the community concept at Pecan Plantation. It is presented here simply as a reference and to help the reader understand that many of the issues that Pecan Plantation is facing are externally generated and effect many clubs throughout the country.

### **Economy**

In the last two decades, our country has experienced a remarkable economic process. The S&L and banking industry failures, plunging interest rates, rising costs, lay-offs, stock market losses and a near freeze in earning levels then leveling off to the current level of uncertainty. In addition, while economic issues tend generally to be cyclical, what the consumer has experienced has left somewhat of a stigma on our collective spending habits. The mid to late 90's brought unprecedented prosperity; many clubs regardless of their location, felt very comfortable and ignored the real signs of concern. Now, with the longest expansion in our economy's history gone and an uncertain economy facing us, clubs finally realize that market conditions have a definite affect on operations and the ability to matriculate new members.

Whether in agreement with the synopsis or not, the fact is we have all experienced the belt tightening syndrome of the early 90's and the stock market uncertainty of 2000 to date. Corporations have and still are cutting perquisites and expenses, downsizing employee strength, and even consolidating and merging. The result is fewer corporate executives available for membership. In fact, unlike generations past, today's member is likely the one responsible for the initiation fee payment, which historically was paid by the company. This sets up new considerations in how the initiation fee is charged.

Consider the older, retired members. Many are content to live off their interest and investments. With stock market and other investments just now beginning to perform at expectations older members are spending less and participating less. Our older members are simply not maintaining the spending pace of their younger years.

The middle age consumer is also affected by today's economy. Consider the forty-five year old couple, with two college-aged children. Even with an income of \$150,000 per year, this family is only on the edge of being a potential candidate for Membership. Even if they can afford membership, the demands on time are such that it is often difficult to justify the cost of membership weighed against the lack of leisure time to devote to the Community. Once the kids are out of school, this family may be a candidate, but it is nearly as likely that they will begin considering retirement and the savings necessary to make retirement possible. This is why some of the more mid-market clubs have adopted fees to meet the needs of this specific younger to middle-aged market.

In any community situation, there are those members who believe the community can withstand any economic pressures, including significant attrition, and pay whatever it takes to keep the Community open. The realities are that when the fees

## Pecan Plantation Long Range Planning

become excessive and non-competitive, these members will leave in search of a more value oriented community. Even the wealthier soon recognize the inequity of remaining members at outrageously high fees.

Historical economic issues, and anxiety of the future not only changed people's attitudes; it has changed their lifestyle as well. The dynamics of these changes affect clubs substantially. As corporations scale back, individuals are dropping memberships rather than pay personally for the privileges of membership. Additionally, lack of confidence in the economy, growing competition and the lack of tax deductibility for memberships and dining continues to dampen many clubs' efforts to sell memberships.

Member spending is reduced, as corporations are stricter in the amounts and kinds of charges that are deemed reimbursable to the individual. The key word today is value. Today's Community must recognize these issues and provide a consistent reason for members to retain membership, as well as to provide the kinds of activities to attract new members. In addition, the perquisites of community membership must be provided in an atmosphere of relative value. The bottom line on the economy is this. Economic factors and consumer fears have created an atmosphere which is non-conducive, except for approximately 3% or so of the population, to pay high initiation fees, high dues and still maintain a relatively high rate of member spending. This means that Clubs must be more focused on the membership issues, become aggressive as the case may dictate, and they must provide an atmosphere conducive to complete and total catering to each and every member's need.

Over the last several years, we have found that many clubs continue to raise initiation fees artificially. They do so with no understanding of their market and no comprehension of the impact to member sales. It is not so much that a Community must react to this crisis by lowering initiation fees, but Clubs, like all businesses, must recognize that initiation fees should not be ego driven to create prestige or credibility. Like all products, the costs must be weighed against the local market's ability and willingness to pay. It is the market that must lead the decision to raise or lower fees.

In addition, under the heading of economic reasons to replenish membership proactively, the current tax treatment of Community dues and business entertainment expense has created yet another impact to our industry. Because of legislation enacted in 1993, many corporations and members were forced to reconsider their use of clubs and justify the number of memberships held. This has affected city clubs largely, causing the premature departure of many from their respective markets.

### **Growth of the Game of Golf**

According to a recently published study sponsored by the National Golf Foundation and McKinsey & Company, *A Strategic Perspective on the Future of Golf*,<sup>1</sup> the golf industry has grown enormously over the past 50 years. The total number of golfers

---

<sup>1</sup> Courtesy of the National Golf Foundation, with permission.

## Pecan Plantation Long Range Planning

has increased sevenfold. The game has broadened from a sport for the elite to one enjoyed by many, growing faster than many other leisure activities.

The strong growth through the mid-1990's was driven more by increased spending than increased participation or increased frequency. Over the next 12 years, demand will increase at 1.5-2.0% per year as Baby Boomers age, but supply is increasing somewhat more rapidly. The game is at a crossroads. It can successfully tap into 40+ million highly interested golfers/potential golfers and convert a percentage of them to committed golfers or it can settle into a steady but low-growth, somewhat more mature and cyclical, industry.

Creating golfers that are more committed requires an understanding of who they are, what their barriers to increased play are, and taking action both at the facility and industry levels. More frequently, clubs are recognizing the need to not only look to the outside in terms of who their market is, but also to the internal demographics of the current membership. Through judicious use of usage data tracking, member surveys and other devices, we begin to understand more of who these people are. By applying broader information about generational tendencies, we begin to see where they may be headed in the future.

### **Competition**

Competition comes in many sizes, shapes and forms. We cannot be so naive as to believe that new restaurants, outdoor activities, social events and other clubs, regardless of their configuration or cost, are not competition. We likewise must be aware that as the number of new clubs being developed continues to reach record numbers, while there may be no competition today, there may be tomorrow.

City Clubs are perhaps the worst hit of any Community in today's economy. Once the bastion of elitism and "good ol' boys" politics, today's economy being more global, more competitive and faster paced, eliminates some of the best reasons to have been a member years ago. Today's consumer has a wealth of restaurants to choose from with diverse atmospheres and fabulous service without having to pay an initiation fee or monthly dues for the privilege. This trend likewise affects social memberships at the country community.

Today, the predominant community being developed is the "high end daily fee". This new breed of community is designed to give the participants the "feel" and service of the private community without the encumbrance of an initiation fee, monthly dues and/or food minimums. Participants choose when they play and hence how much or how little they will spend. If the respective "high end daily fee" community accomplishes its objective to provide the private community or resort atmosphere, the participant may feel they are giving up nothing available to them at the private community. Hawks

The natural question asked in rebuttal to this is, "Yes, but where will the discriminating consumer find adequate fine dining?" For dining or social interaction, most areas have an abundance of great restaurants and social events. So clearly, this type of facility will become serious competition for membership in the private country clubs.

## Pecan Plantation Long Range Planning

Today, while facility growth has slowed, there are still hundreds of new courses that open each year.

### **New Attitudes**

The attitude toward private community membership has changed dramatically in just one generation. Private clubs were once the bastions of social and business networking. Acceptance into membership was considered a benchmark signaling one's success. Private clubs were also a center for family, social and recreational activities. There are many reasons for this change.

First, many of the old-line reasons for joining a private community are no longer valid. Competition from public and resort courses has caused many potential members to think twice about giving up this variety to become locked into playing just one course. The same holds true for dining and socializing. Even access to tennis and swim facilities no longer provides strong motivation, as most new residential developments offer both of these amenities.

We are looking at three distinct groups as potential members. They are defined by the times in which they were raised and have separate reasons for considering (or not) whether to join a community. According to Dr. Bonnie Knutson of Michigan State University's School of Hospitality Business, these groups are the "*Matures*, *Boomers* and *Xers*". Each has its own psycho-graphic profile that can help us understand their particular needs and motivations.

The "*Matures*" are defined by duty. They celebrate victory and prefer a team player style. Education is a dream to be attained and the future is a rainy day toward which to work. For these folks, many of whom survived the Great Depression, work is an obligation and life's rewards are to be earned.

The "*Boomers*", the product of the post-WWII baby boom are defined by individuality. They celebrate youth and tend toward a self-absorbed style. They feel that education is a "birthright" and the future is "now". For the Boomer, who saw his parents spend their entire life often working for the same company, work is an adventure. Life's rewards are deserved because of who they are.

Generation X, also known as "*Xers*" is defined by diversity. They celebrate savvy and prefer an entrepreneurial style. Education is a way to get where they want to be, but their future is uncertain. Work is a difficult challenge, to be overcome. Rewards for this group are needed as they appreciate their "play" time.

Today's potential member is more family-oriented. The days when Dad played golf while Mom tended the kids are gone forever. In fact, today the inverse may be a more accurate portrayal of reality. Consider the fact that women hold nearly 50% of all new management jobs in the U.S. and you will see one of the most significant changes affecting the private community industry. Couples and families look for social and recreational opportunities that they can enjoy together, or separately but equally.

The new generation has interests that are more diverse. They do not tend to be joiners, because joining tends to focus one's interests in one direction. Many in this

## Pecan Plantation Long Range Planning

category enjoy the diversity of playing different courses instead of being tied to one course week after week. Most cannot afford to enjoy the best of both worlds and are choosing the diversity offered by high-end daily fee and resort courses.

Once private community Membership was considered a necessity. Today, it is considered a maybe. The clubs that are prospering are the ones that have addressed these changing consumer attitudes and addressed the specific needs of each of these diverse cultures.

Culturally, clubs are in a dynamic refocusing stage. Look at formal dining, once the norm for private community dining; it is now the exception. Other changes will come as well. The term, "it's not your daddy's community anymore" was never truer than in today's culture. Twenty years ago, to join a community, you became part of and adhered to a mainstream culture, or you were not accepted. Today's diverse member brings their own culture, their own wants and needs and their own attitude to the private community. The result is an atmosphere of dynamic and sometimes difficult change as well as a need to look deeper at determining how the Community must be postured to ensure its continued viability within its marketplace.

### **Graying Population**

Another factor affecting memberships is the aging population in the United States. In the golf industry, particularly the private community industry, golf participation has typically been higher in the older age groups, with less spending. Most clubs, in fact, demonstrate that the younger members have higher member spending averages than their older counterparts.

Older, and perhaps somewhat wiser members, drink less and, because they are typically at or near retirement, bring fewer guests to the community. While having a large number of older members around to use the community is great for the other senior members, if their spending habits decrease; the community may be forced to infuse younger members. Additionally, as a membership ages, it becomes increasingly more likely that the community must recruit new, younger members, or risk the almost certain eventuality of major attrition, as seniors reach an age that membership is no longer viable. Every community in the country with an aging membership faces the same situation daily, morbidity, mortality and moving away.

### **Summary**

Several factors are at work simultaneously to create what very well may be one of the most difficult periods in recent history to matriculate new members. Clubs today are faced with two choices; either they adapt to these existing factors and become proactive, or, do not adapt and wait to see if a correction takes place. It is CMC's opinion that the more passive response will likely lead the Community in the wrong economic and financial direction.

Strategic planning plays an incredibly important role in shaping the future of the private community. Strategic planning is not necessarily where you may *want* the

Pecan Plantation  
Long Range Planning

community to be five or ten years from so much as it is where the community needs to be five or ten years from now.





Pecan Plantation  
Long Range Planning

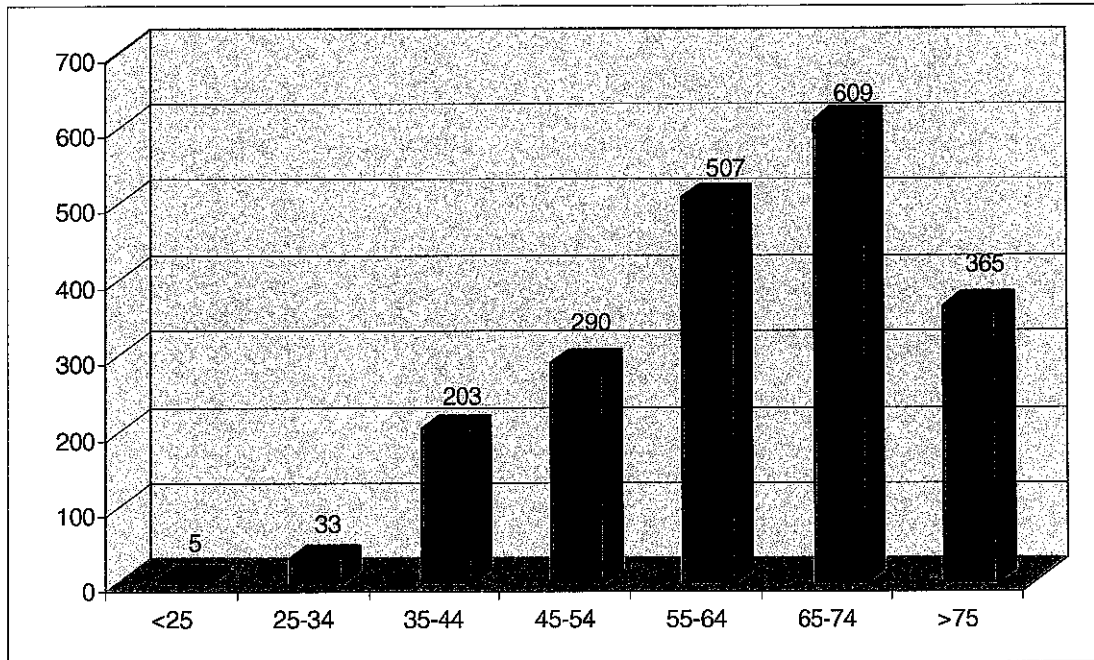
The following tables will provide a more detailed overview of the market area demographics including the number of households by age and income.

**Table 1 – Community Demographics**

0	0	0	21	0	0	1
1	1	0	0	10	9	27
0	0	0	0	6	33	38
0	0	27	4	40	39	64
0	5	36	21	107	144	155
2	7	16	35	84	119	67
1	6	103	88	168	143	4
0	14	21	48	13	86	3
1	0	0	32	42	19	4
0	0	0	28	30	16	1
0	0	0	13	7	1	1

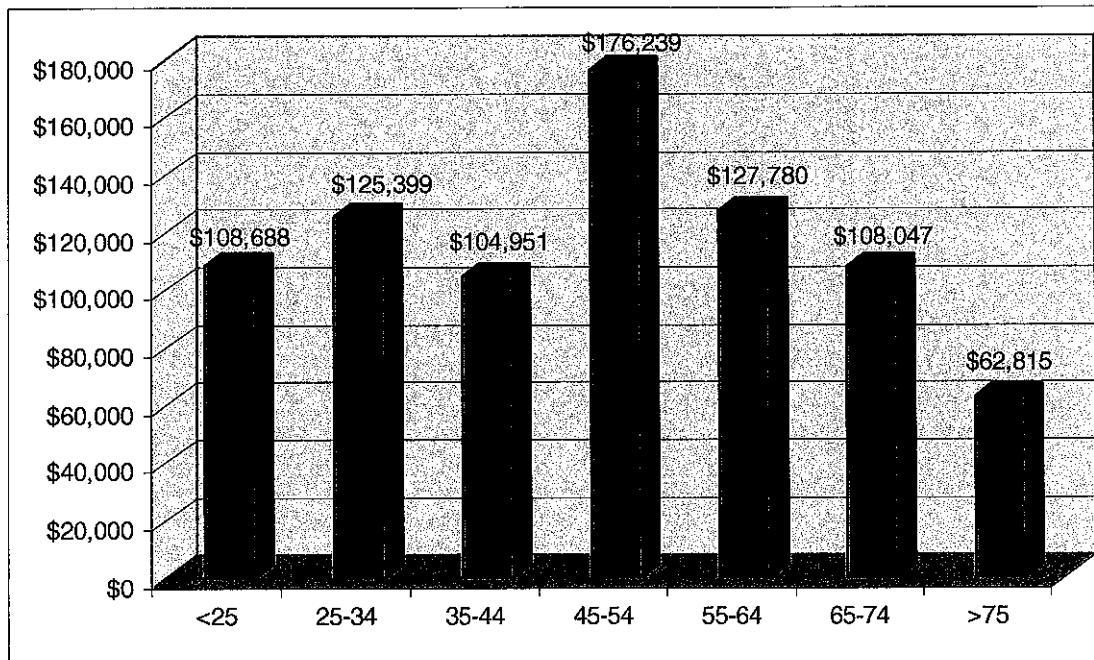
As this chart illustrates, Pecan Plantation is not a wealthy community. Essentially the information in the charts provides an opportunity to preview number of households within the community by income and by age. The charts on the following pages will provide number of households by age and median and average annual income for the community by age group..

**Chart 1 – Households by Age**



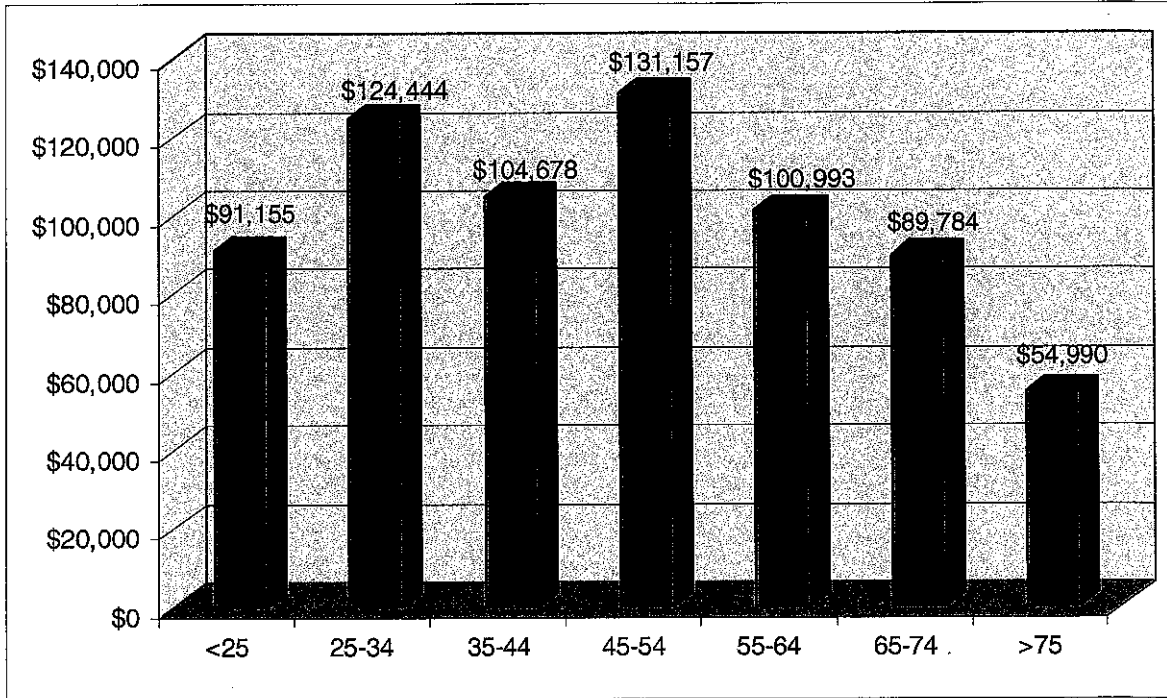
As the chart indicates, the largest concentration of households is in the 65-74 year old age range, with the 55-64 age group the second highest demographic group.

**Chart 2 - Average Annual Income**

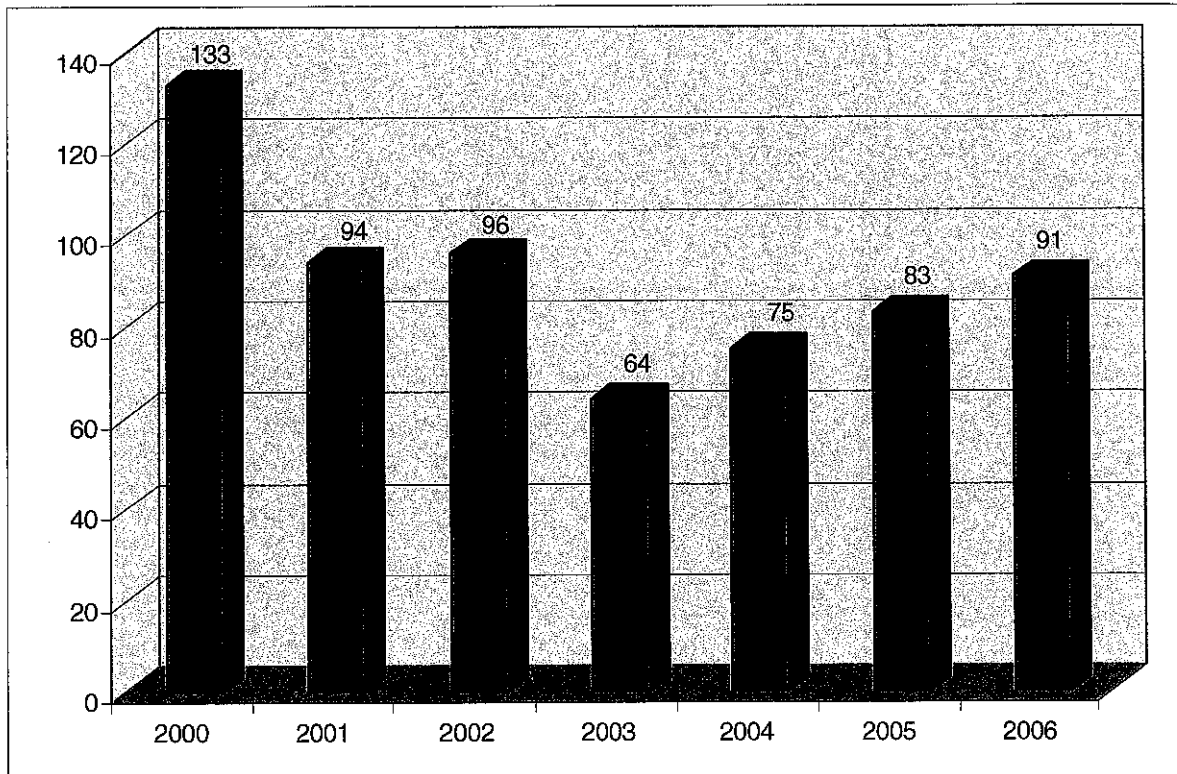


Pecan Plantation  
Long Range Planning

**Chart 3 – Median Annual Income by Age**

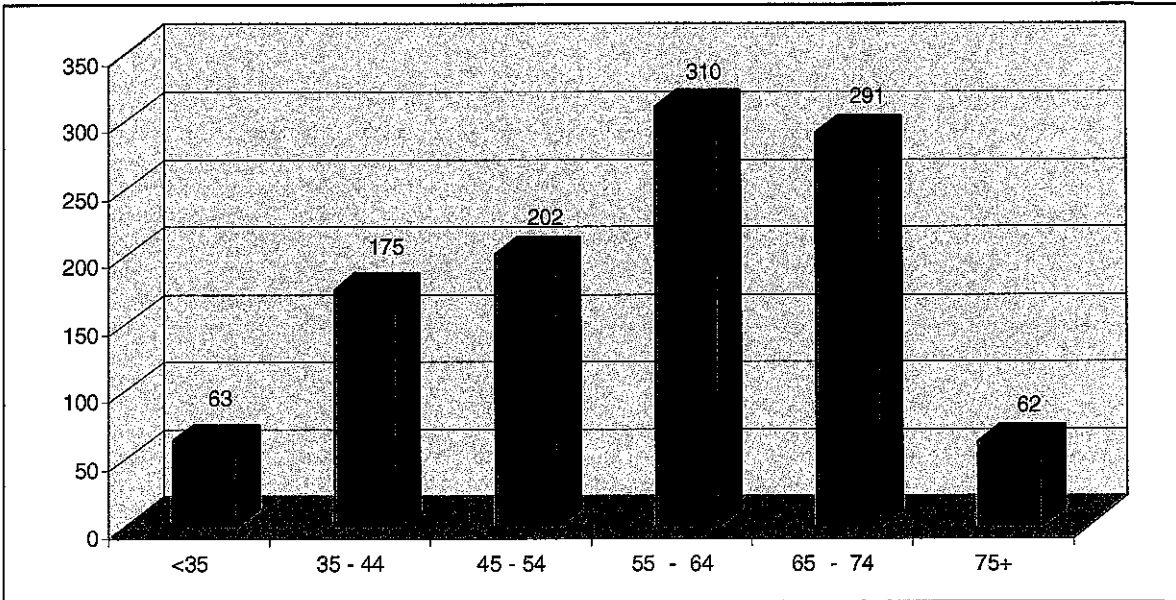


**Chart 4 – New House Permits**

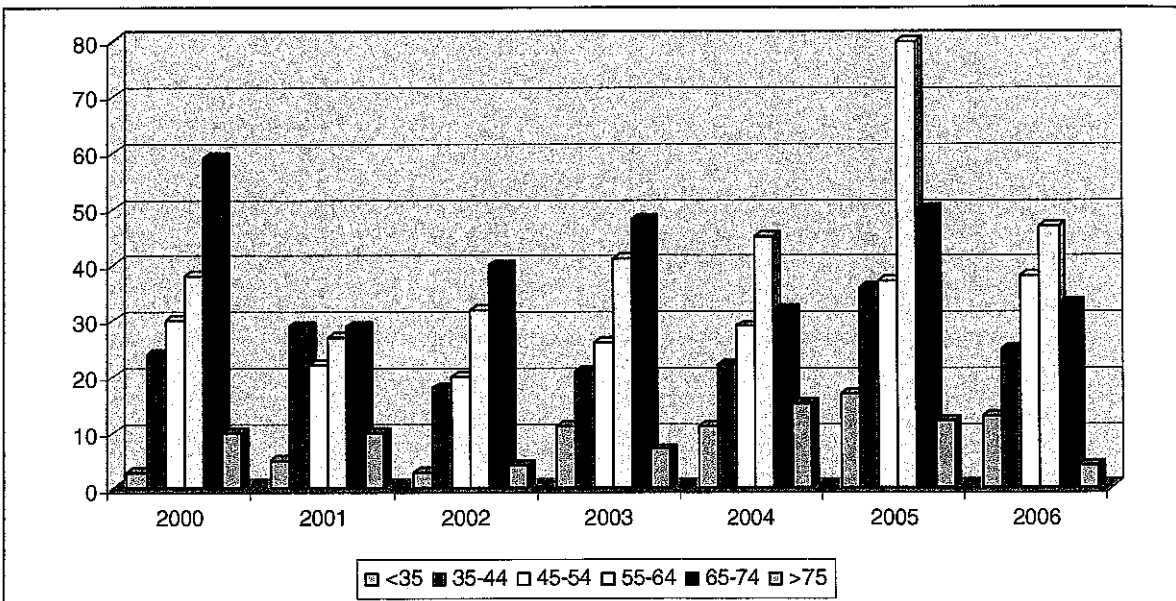


Pecan Plantation  
Long Range Planning

**Chart 5 – Age of New Buyers**

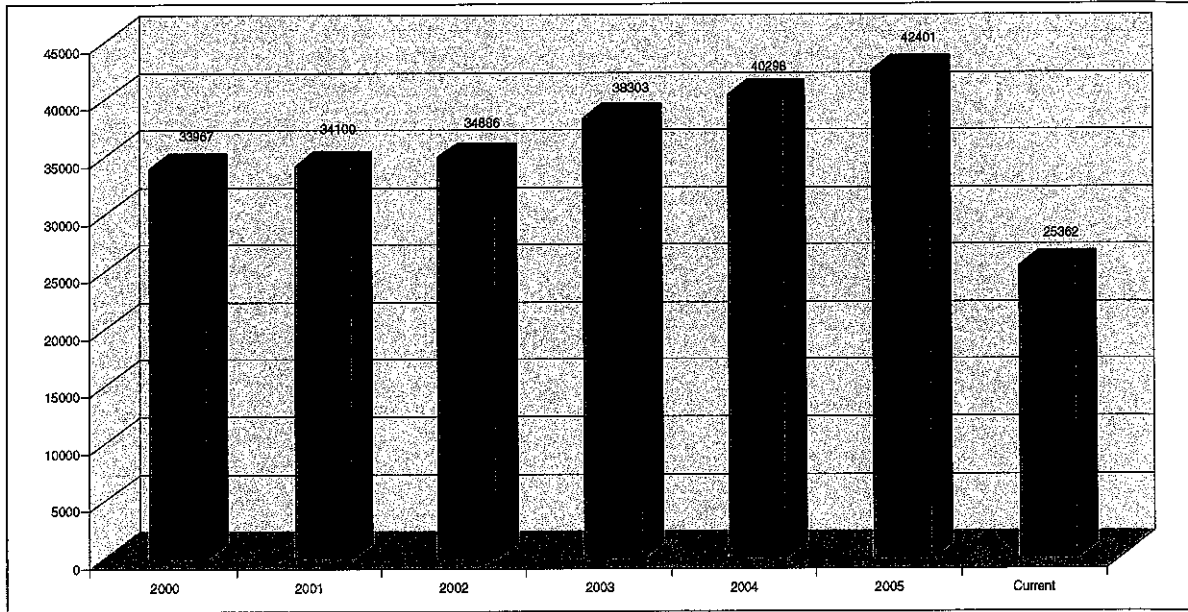


**Chart 6 – Trends in New Buyers by Age**



Pecan Plantation  
Long Range Planning

**Chart 7 Golf Rounds – Member Course**



A complete set of demographic charts and the actual map of the areas demographically surveyed are included in the Appendix at the end of the report.

## ***Vision Statement***

---

In the various visits to Pecan Plantation, CMC has not been introduced to a vision statement that may or may not exist. Again in an effort to provide as much of CMC's experience and expertise to the planning process as possible, this section is provided as reference to the Long Range Planning Committee.

*Vision Statement Definition:* A description of the future the business or community aspires to achieve, or a description of a future state that's better in some significant way than what currently exists. What, after careful consideration of the historical and situational analysis, you understand the community must become.

*Background:* Vision is a mental picture of what lies at the end of a road never traveled before, and a Community Vision Statement articulates the future status of the community, (after the journey), usually in terms of products, services, members, amenities, desired financial state, recognition, perception, etc. Community Vision Statements describe the community not as it is, but as it may need to become.

Boards and management must know what path they're on (their mission) and where it's taking them (their vision). When both mission and vision are clear, day-to-day issues and challenges are seen from a higher level – the big picture, thus allowing staff to facilitate the mission and vision with minimal intervention by volunteer Boards or Committees. The tasks of setting goals and priorities, planning, and execution are aligned with the mission of the organization, and its desired future.

Another way of looking at a Vision Statement is that it is part one of a two-part description of the overall community intent. The Vision Statement describes the future: where the community is going. While the Mission Statement, part two, describes today: why the community exists today, it's purpose and desire. Together they provide direction for the community by focusing attention on doing things day-to-day to accomplish the mission, while taking steps to pursue the vision of the future – the long-term focus.

A solid vision, documented as the Vision Statement, creates commitment and understanding. It enables the team to focus on the future, and it enables others who read it to understand how the community visualizes the future. It should challenge and inspire the staff to achieve the mission. The actual value in having a Vision Statement is that by raising the expectations of the community, a gap is created between where the community currently is and where you want it to go. Then, having created the gap, all business decisions and activities would/should be focused on closing the gap. Initially, it is a dream that with the right plan, personnel, commitment, and follow-thru can come to fruition. Remember, it will always remain the dream until and unless the proper tools are provided to staff to implement.

## Pecan Plantation Long Range Planning

Effective Boards not only have a vision but also invest time selling their vision to gain buy-in from the community and staff. Leadership should always have a clear vision of a potential reality that they want to create; have the ability to communicate that vision to people whose resources they need in order to bring the vision to fruition; have the ability to inspire and motivate community and staff to willingly contribute their resources to enable the realization of the vision. These leadership attributes apply to almost every community role that a Board member is required to fulfill. Whether it's a member, a potential member, or staff an effective leader needs to communicate a vision to sell, to inspire, to motivate.

The words that compose the Vision Statement should be carefully thought out and weighed, so that the statement itself isn't too bland or boring, but is heartfelt enough to excite and inspire those who read it to take action. The words should also reflect the values the community actually lives rather than those it believes it ought to live by. The Vision Statement should allow current and future Boards and staff to stretch their expectations, aspirations, and performance.

Note, that one also gets much more mileage and buy-in with the Vision Statement when it is wordsmithed in a group (the team) setting, and one can accomplish the end objective much more quickly when one starts with a straw man versus a blank sheet of paper. When published after group input, the vision is shared, and those who participated feel personal ownership of the Vision Statement.

Some things to think about as the Vision Statement is being developed:

How do we want the community to look 5+ years from now? That picture should be different from today's picture in several ways.

Think about services, facilities, the targeted market, member satisfaction, etc.

Is it the right direction?

What is missing, if anything?

Does it inspire support and commitment?

Does it create an emotional and motivational response? (The entire team needs to be able to identify with it and use it to make decisions and focus their energies).

Is the vision achievable?

Is it easily understood and can it be sufficiently absorbed by an individual to cause action? (A Vision Statement needs to connect to the daily lives of employees).

One will need to be prepared to set specific goals, and take action, in order to make progress toward achieving the vision.

The Vision Statement should potentially answer questions like:

What would success look like?

What opportunities do we have that we aren't taking advantage of?

What would we do if we had more time and resources?



## Pecan Plantation Long Range Planning

What do we want to be known for in the golf and residential community? Perception or reality?

What is our culture, strategies, values, and vision of the future?

How to proceed:

The basic thing about any strategic planning or long range planning process is that it starts from an objective analysis and is based upon the needs of the Community and its membership. Remember, it is also about ensuring that future generations of community members find the Community attractive.

In creating a plan the conception is referred to as the Vision. As a vision, it is intangible, and leadership's job is to lead the initiatives that would make it a tangible reality. So, the vision is the first sound strategic element that must be defined, documented, and communicated. The Vision Statement is the beam of light that provides clarity for all other activities and decisions for each of the Sub-Committees, as well as successive Boards. Without a vision of where one wants the community to go, how would one ever get it there?

Members and employees whose judgment and insight are respected, should be approached to see how they view the community and what potential they see. Focus groups and including others in the strategic planning sub-committees can be a great first step. You may get some good ideas that would expand upon some of the primary committee's original thoughts, as well as build better consensus by involving community members.

Publish it and communicate it. Review it with staff and/or team to gain consensus and buy-in, then publish and communicate it; the value of doing it this way is that the vision is shared, and those who participated feel personal ownership of the Vision Statement - everyone owns the result. The downside is that you may not like the consensus process or the end result.

As you then make decisions on a daily basis, use your Vision Statement as a point of reference. Choose the decision that most closely supports your vision. That's the real value of the vision – to keep you focused on where you want to go. It's also the foundation for developing the Mission Statement and the Operational Business Model.

## ***Mission Statement***

---

Again, as a reference, CMC has provided its recommendations on establishing or re-establishing the Mission Statement for Pecan Plantation.

### ***Mission Statement***

The mission statement should convey several things. To the members and prospective members it should say what the Community is all about, i.e. family, fun, value, etc. To the Board of today and the future Boards it should set the tone philosophically as to how they want Pecan Plantation to be operated. To management and staff the mission statement is a roadmap to operating the community on a day-to-day basis. Therefore care must be taken to be very selective of the descriptive language utilized and to avoid any contradictory terms.

Sample Mission Statement for Pecan Plantation.

**“To provide our members, their families and guests an outstanding golf experience in a community environment, diverse in community amenities, rich in camaraderie with a tradition of value and quality.”**

Other Sample Statements

### **Sample Vision**

The XYZ will continue to be a premier, private, secure, and environmentally sensitive residential community providing outstanding amenities and lifestyle opportunities for all owners.

### **Sample Mission (Same Community)**

The mission of XYZ Community is to provide family centered social and recreational opportunities and facilities for members of the XYZ Community and their guests. The Community will provide exceptional facilities, programs and services by maintaining a market driven focus, enhanced by innovative planning and exemplary management standards and employee practices while maintaining a dues and fees structure competitive with finer private residential clubs in the Southeast United States.

### **Sample Core Values**

The XYZ Community is committed to:  
Act responsibly with integrity and openness  
Understand and be responsive to individual members while being responsible for meeting the overall expectation of the membership at large

Pecan Plantation  
Long Range Planning

Encourage member involvement in activities that enrich XYZ as well as the larger community

Create sustainable superior value relative to our competition

Seek continuous quality improvement

Provide for employee safety, professional development and well-being

Demonstrate respect for the individual

Encourage teamwork, innovation and risk-taking throughout the organization

Protect the environment

Preserve and protect the physical assets

## ***Focus Group Summaries***

---

### **PECAN PLANTATION FOCUS GROUP SUMMARY OF RESPONSES**

Club Mark Corporation (CMC) was commissioned at the request of the Long Range Planning Committee and approved by the Board of Directors to perform a series of five focus group sessions with the residents of Pecan Plantation. On behalf of Pecan Plantation, CMC conducted these sessions On October 17<sup>TH</sup> & 18<sup>TH</sup> of 2006.

**Methodology** - While it was CMC's recommendation that the Club call for volunteers, then assist CMC in ensuring that the mix of attendees was representative of the community in terms of gender, age, utilization of facilities and supporters versus concerned members, the LRP and Board insisted that the selection process must rest solely on the decision of CMC. As a result, CMC, through the Club, sent invitation letters to the entire membership with instructions to contact CMC directly to participate in one of the five listed sessions. In all, one hundred fifty volunteers responded. CMC then sent the volunteer lists, by session and requested that the Club provide an approximation of the age of the volunteer and their general utilization of the facilities. CMC then selected the invitees and notified the Club of who had been selected. Both the Club and CMC then attempted to reach each individual to notify them of the selection. Those not selected were sent a letter indicating that they had not been selected. Throughout the process, while CMC kept management completely informed of the selections but had no input from any source within the Club relative to who CMC should or should not choose.

As should be expected, there were varying levels of participation and discussion within each respective group. Each group was presented the same information at the beginning of each focus group including a background and introduction of Club Mark and the moderator, a general narrative of how each session was anticipated to be conducted, and the areas that would be discussed.

Focus groups, while not intended to be a broad sampling of member opinion, because of the narrative and free flowing format, are an important communication tool for decision makers as they often reveal issues, concerns or misconceptions that exist within the membership. They really tend to gauge attitudes associated with various elements of the operations or governance. Likewise, focus groups made up of diverse segments of the membership allow a fair exchange of opinions on various elements of the operations, facilities and events currently being offered. Most importantly, and specifically related to the potential for facility upgrades at some point in the future, the process allows a very open forum to hear what various demographic elements of the Club feel about the necessity for such upgrades or improvements and their affect on the ability to keep the Club viable within the marketplace. It is important to remember that in most focus group sessions a great

## Pecan Plantation Long Range Planning

deal of emotional release will become apparent in the responses. This is quite normal as most members do not have the access to the same clarity on the issues presented as do the Committees and Boards.

Each session has been segregated so that the reader may view the responses on the basis of the make-up of the respective group. The responses are essentially verbatim but they have been summarized in order for the reader not to be required to read nearly 100 pages of narrative. However, a full recording of each of the sessions, except for Session I, which was not recorded as the facilitator was not used to the recording device utilized by the Club, is available for full documentation of each session. After the first session, once CMC realized that the recording was blank, CMC called and emailed each of the participants as asked for their responses to each of the questions again. Most did call or email back and the facilitator also began immediately recalling from memory what was said at the first session.

The following questions were asked at each session.

1. How Would You Describe Pecan Plantation Today? As a Family Community or a Retirement Community? Which Would You Prefer it to Be and Why?
2. If There Was One Thing About the Club or Association That You Could Change What Would That Be? With Regard to Community Services?
3. If There Was One Thing About the Club or Association That You Could Change What Would That Be? With Regard to Food & Beverage?
4. If There Was One Thing About the Club or Association That You Could Change What Would That Be? With Regard to Physical Facilities?
5. If There Was One Thing About the Club or Association That You Could Change What Would That Be? With Regard to Activities and Events?
6. If There Was One Thing About the Club or Association That You Could Change What Would That Be? With Regard to Governance?
7. Assuming That Any or All of These Changes Were Made, How Would it Affect Your Usage of the Club and Facilities?
8. How Do You Feel About the Current Level of Communications Concerning Major Issues? What About Communications in General?

Pecan Plantation  
Long Range Planning

9. What Are Some of the Things That First Attracted You to Pecan Plantation? What in Your Opinion Has Changed Since You Purchased Your Property, For Better or Worse?
10. Would the Same Characteristics That Attracted You Still Be the Primary Reason That Someone Might Consider a Purchase Today?
11. Is There Currently Any Barrier to You Referring Someone to Purchase in Pecan Plantation?
12. As a Part of a Long Range Strategy, and as the Community Grows, Leadership Must Consider Ways to Provide the Community the Best Possible Facilities and Services, Including the Ongoing Renovations of Existing Facilities. Are There Any Things That the Board and Management Should Consider in This Process?

The Executive Summary is intended to provide the reader with a general overview of both the substance of the community's response as well as the facilitator's perception of the depth of concern on specific issues.

### EXECUTIVE SUMMARY

Based upon the overall responses of the five focus groups several things became apparent to the moderator. While the sampling of members is not broad enough to suggest tacit agreement of the entire membership regarding the issues presented, their response allowed a glimpse of what could be underlying attitudes and currents of concern.

In a general sense, the facilitator was somewhat overwhelmed with the reality that there are clearly factions that do not trust nor believe in the current Board or Management. While this manifested in some of the commentary within the focus groups, it was clearly evident in the near paranoia that surrounded the selection of the attendees and the responses of some that were not selected in the process as well as post session questions to the facilitator that even suggested impropriety on behalf of the facilitator. Often, this viewpoint is a manifestation of a perceived lack of transparency and/or communications, and nearly always on the basis that the normal member does not have the same information at their disposal as does the typical Board or Committee member. This issue of transparency will be further discussed in the Executive Summary.

*How Members View Their Community* – The first question provided a glimpse of how the attendees viewed their community as family oriented or retirement in nature. While there was diversity as to the evolution of the community, nearly every

## Pecan Plantation Long Range Planning

attendee believes that Pecan Plantation is and should be a family community but catering to the diverse cultural needs of what they considered to be a broad range of ages and interests.

There seemed to be some concern that the younger generation did not utilize the dining facilities as much as the older members. The general consensus was that younger families have a greater demand on their time and therefore found little time to use the facilities to socialize. Many pointed to the community center as being an opportunity to provide a focal point for all age groups, but specifically the younger family and the teenagers within the community.

Of all of the questions posed at the various sessions, this was the most amenable, generally providing a point of consensus as to what the community should be.

***What Members of the Community Want*** – This was a three part questions that dealt with the attendees ability to change anything relative to service(s), facilities and events.

***Community Services*** – In general, the members appeared fairly satisfied with community services with particular pride in the EMS and Fire departments. The recent addition of retail shops also received general approval. Security appeared to be an issue with many of the participants, particularly related to teenagers, and security in the evening hours, where several attendees commented that they had driven past the guard shack and found security asleep. Another concern was that the age of the security force negated any real response to physical challenges.

***Food and Beverage*** – Overall food and beverage took some serious criticism based upon quality of food, level of service and hours of operation. Considerable discussion developed in each session relative to the cause and effect, most of which demonstrated a lack of understanding of the issues affecting food and beverage, but also underlying the community's general concern at having this area upgraded.

Lack of consistency was cited as an issue in nearly all of the sessions, both in the quality of food and in the service staff. Hours of operations i.e. closing early on Sunday afternoons and not having daytime service except in the downstairs area also received criticism.

Some members of various internal clubs indicated that they would no longer come to the club for their meetings citing lack of consistency.

There were also undercurrents of concern from a few members that this area should actually be shut down. There were also differences of opinion on the facilities on the basis of age, with the younger attendees being much more concerned with the look and atmosphere of the facilities and not having any consistency in service and

## Pecan Plantation Long Range Planning

quality. The younger members also tended to seek more diversity in the menu although menu selection was a general concern of most attendees.

On the basis of the discussions, and frankly on the basis of the facilitator's personal experiences, the area needs a thorough cleaning, paint and carpet cleaning. This would be a start in rehabilitating this area. The difficulty in hiring and keeping wait staff will always be an issue simply based upon location, but active training programs and floor supervision would contribute to better consistency. Hours of operation must be predicated upon volume, but there may be some merit in determining a few days each week that the upstairs dining (Brazos Room) could be available. The outside terrace dining was cited as a desirable location in certain times of the year as was the gazebo.

Food and beverage is generally one of the most misunderstood areas within a country club community. Unless there is a significant amount of banquet business it is very difficult for the ala carte business to even break even. Yet, if the facilities are not upgraded, enhancing banquet revenues is unlikely.

*Physical Facilities* – There was an underlying concern in most of the groups that the community was not maintaining the facilities that they had. This included the beach areas, marina, food and beverage areas and parks/common areas. This concern also manifested in not wanting to continue adding things when the things they have are not maintained.

Lighting at the beach and park areas were discussed as a means of preventing vandalism and loitering.

The two most common issues of implied need were another golf course and a fitness facility. An indoor pool also was mentioned in several of the sessions.

*Activities and Events* – This question evoked a mixed response, but most agreed that the level of events was good and that the Committee did a good job. However, there was concern that the Entertainment Committee, as with many other Committees, meet during the daytime precluding younger, working members from participating. Likewise, there were several comments relative to most of the events not being geared toward younger families or couples.

The popular, holiday oriented events, appeared to many of the attendees to fill too quickly making reservations impossible.

The community center was viewed as very positive and providing many more opportunities for families as well as seniors to participate in more activities and events. The community center was also viewed as positive relative to providing the teenagers a place to find activities.



## Pecan Plantation Long Range Planning

*Governance* – This question, like food and beverage, set off a myriad of emotional responses. Spending, building a too large administrative staff, not having a voice, and timing of meetings all evoked an emotional release. Serious discussions ensued in most sessions relative to becoming a city or municipality, with varying degrees of agreement. In general, there seemed to be a very distinct “us” versus “they” mentality with the Board and management taking a verbal beating.

In several sessions there were also those that praised the Board's efforts, but these comments were in the minority. Several implications were made that suggested a micro-management of the management staff. Other comments suggested that the community was becoming too large to remain governed by a Board.

*Would Your Usage Increase if Things Changed* – In general, the attendees focused on increased usage of the food and beverage areas. While the general response was positive several people attending indicated that their usage would not increase no matter what management did to enhance the clubhouse operation. This was also an age related response with many of the younger members indicating that they did not use the facilities based upon other time commitments, the condition of the facilities and the need for variety and hours that fit their lifestyles. This likewise would seem to correlate to the food and beverage survey responses.

*General Overview* – In general, it is evident that there are some real concerns among the various member groups based both on age and on participation in various specific activities available within the community. Non-golfers tend to believe that “golfers” are running the community and for their own purposes, the older members think a lot of what happens is geared toward young people and the younger members see it in reverse.

Cost is a real issue for those on fixed incomes and they generally demonstrate the most distrust of decisions and reasons to spend money, often citing “layers and layers” of managers and a reduction in availability of services. It can also be an issue for the younger families with higher mortgages and children. An educational process should be developed that lets members see how incomes are generated and where the money goes. Even if this were just in a graphical form and provided annually, members would eventually understand more about how the community works. Obviously some get it quite clearly and would like an even more sophisticated look at financials on a regular basis.

Pecan Plantation is clearly a very diverse cultural setting with a significant number of retirees and pre-retirees as well as a growing contingent of younger families. This brings with it a need for the community to focus on providing a well balanced menu of services and activities to meet the needs of the residents.

Perhaps the most major issue revealed in the focus groups was the perception of heavy handed governance and the lack of communications. As previously

## Pecan Plantation Long Range Planning

mentioned, there is an almost paranoid concern on behalf of the Board and LRP that everything be transparent, yet at least some factions of members continue to insist that there is some kind of conspiracy in everything that occurs on a Board or Committee level. Obviously, while the focus groups did not reveal where this kind of rhetoric comes from, in the perceived absence of "facts", members will often fall victim of the "rumor mill" creating

*Transparency and Communications* – Real or perceived some members often feel that they are given "little or no information" on the major issues, hence "little or no choice" in what happens. Evidence that this may exist at Pecan Plantation involves a comment made in the second session after the meeting. An attendee explaining the vehemence of their response suggested that anything less of a response might have signaled to the Board that members, in the absence of contempt for what was happening, would send the wrong message to the Board.

While the very nature of the focus groups should have created some sense of confidence in the attendees that the Board and management was interested in member feedback and being forthright in its attempts to communicate, the facilitator noted that the Board and management were almost never referred to except as "they" by the attendees, with the obvious connotations and implications.

While it would appear to CMC that the current Board and LRP has taken great strides in ensuring more open and transparent communications, there is still a fairly widespread perception that the Club is run by a few "golf" enthusiasts and that decisions are made in the "back" room. While inconceivable, many believe that management should be by referendum rather than by a governing body.

CMC recommends that the focus group sessions become a basis for a communication process that begins by printing a summary of the results and making them available to the members. Anyone wanting to read the entire report should be able to do so, but CMC would recommend that this be in a controlled setting as the individual comments could be used out of context to distort the message. As a secondary step, there are specific issues that came out of the sessions including things like maintenance of the existing facilities, consistency in food and service, etc. that should be answered over the next several weeks, at least in indicating that the Club has heard the member's concerns and that a plan to address their concerns will be forthcoming. CMC also recommends that management try to get as many of the email addresses as possible and make an effort to create a more frequent and informative email blast to the members. There are several programs available that can make the emails look more like a newsletter and members tended to believe that this was one of the more favored communications vehicles.

Again, whether perceived or real, several of the attendees see the communications process as flawed both from the Club and from the Club's leadership relative to major issues. In the perceived absence of appropriate information, members often become mistrustful of the governance process, the nomination process and the

## Pecan Plantation Long Range Planning

validity of information coming from the Board and Committees. Many members perceive the Board as a "closed" fraternity of golfing members that makes decisions based upon their own respective needs and not those of the entire community. Strategically, better, more comprehensive communications providing the members with a quarterly State of the Club/Community report, construction or renovation issues, and other pertinent issues under consideration should be reviewed. There is a danger in any decision making body that you can seriously "bog down" the decision process by providing the entire constituency details that they may not understand or not have access to the body of research that the Board has, however, in CMC's experience replacing notices in the newsletter with a Quarterly State of the Club/Community seriously reduces the internal rumor mills and enhances confidence in management and Board.

While CMC recognizes that the Club has undertaken a Long Range Planning process which is attempting to clearly and concisely identify the issues of the Club, an important element of consensus building may have inadvertently been omitted from the process, the involvement of other members so that more members could share in an understanding of the complexities, thereby creating more advocates. Were the Club to revisit the Long Range Plan as an updating process, CMC would strongly advise the Club to create various Sub-Committees and to involve as many other members in the process as is appropriate. This educational exercise often leads to a broader appreciation for the work not only of the Board, but also the complexities involved in keeping a Club vibrant through the generations. Consensus is then easier to achieve.

*Educating the Membership* – There are clearly a myriad of issues that affect Pecan Plantation, as well as clubs/communities all across the country today that have a profoundly different affect on planning and ongoing viability. Unless a member reads the industry magazines or attends the workshops and seminars of the professional staff, or serves on a Board where this information is disseminated by staff, they have no frame of reference except what "used to be" or pure perception and emotion. The reality is that the usage of club facilities has changed through the cultural differentiation of the community, an aging population, increased pressures on leisure time, varieties of ways to spend disposable income and diverse interests.

Older members tend to want to go back to what the Club once was, pure golfers tend to want only that which is good for golf, and family members want facilities and activities that make sense for them. The focus group sessions provided a brief glimpse, for those in attendance, of the complex nature of providing for a myriad of wants and needs, not only of existing members, but the next generation of members as well.

In addition to the communications recommendations listed above, it would be a good idea for the Board to use the focus groups as a reason to host either a series of "fireside chats" or a Town Hall meeting for purposes of both demonstrating that you

Pecan Plantation  
Long Range Planning

are listening and to better educate the members on as many of their concerns as possible. For those that cannot attend, have a summary of the points to be discussed at the meetings and ensure that each member receives a copy.

Conclusions – While some of the following comments made by the attendees may be difficult to understand or to place in context, what they have provided is an understanding of the incredibly diverse level of wants and needs. The reader may find responses and attitudes as offsetting or paradoxical. To some degree they are as the cultural make-up of the groups was intentionally as diverse as we could make it. However, the exercise was extremely important in setting up the next level of communications so that the members have a much more accurate picture of not only their own club, but of the industry and the challenges that it faces. Contrary to one of the attendees that proclaimed that Pecan Plantation was not part of an industry, in providing the members with a “big picture” overview based upon the observations of the focus groups, it is CMC’s opinion that the members will be in a better place to see where Pecan Plantation needs to go.

Based upon the responses, CMC might also suggest that the Club consider doing a less expensive, but more comprehensive community email survey.

Focus group 10/17 11:30 PM

**Note:** The recording device that was used for the focus groups, rather than have an employee in the room, did not actually “start” in the first session. As a result, the facilitator called and emailed each of the participants to resend their responses. The compilation below is what we received in a verbatim format.

Training and invest in the young staff...these are a good group of young people- they just need some help.

As they improve, pay them , and encourage them to stick around. All the services will improve.

A smoke free area for lunch.

A health club for all residents. Add \$5 to 10 to all monthly dues and have a 1st class facility with Trainers available 16 to 18 hours a day.

Heart health equipment- blood pressure and refib equipment.

Security and the amenities are both very important to us.

The golfers need to be aware of the rules and we need enforcement and punishment (probation for a month). 4 golfers in 4 carts just wears the course out quicker. We are the enemy....We need a campaign to encourage the membership take better

care of both courses. You cannot abuse the course just because you pay for it.

If they build a 3rd course- the Pecan Plantation Association should take over Nutcracker. Then build a great course- that is more walkable and has super services. Nutcracker members should get first shot at a reduced rate.

We use to have many small groups come for meetings during the week at the club-- Mrs. Baird's Bread, TXU, etc. I don't think we're selling the Inn at the clubhouse

Pecan Plantation  
Long Range Planning

now. If a small group comes in, that means room nights, meals, meetings etc. Last spring I went for one of those medical check-ups, the group came from Phoenix and had been in Granbury several days. They complained about the high rates of the motel where they were staying. They did not even know we had an Inn and cheaper rates. I think every time some group wants to come to sell something, they should also be offered an opportunity to stay at the Inn.

1. Pecan is a semi-private, gated community fairly evenly divided between families with children and retirees and leaning more toward the former. I'd prefer more retiree type living but that's because I am one.
2. Dining is, in my estimation, a disaster. Quality is poor and days open are limited. all you can eat nights are cheap but remind me of a golden corral, not a private club. Financial statement each month is meaningless but indicates that dining room is losing its shirt. You get what you pay for.
3. EMS, Police and Fire are wonderful. People should be charged minimum amount per month. Donations fall short. I feel also that as a separate entity the organization could be gone in favor of another group. We should make sure what we have remains the best with close ties to PPOA.
4. I've spoken on F&B but I wonder if we need a catering manager. Is this a P&L op.? Does it pull it's weight? Can it be improved to do so.?
5. A fitness center would be a good thing. Probably tied in with the community center. Another pool is needed with the population. Pools need more "adult only" time.
6. Re: Governance. don't understand GM roll (at this club) as can't find job description or how measured. It should be (in my estimation) that the Board sets policy, assigns goals and objectives to the GM along with how he/she is measured, and then gets the hell out of the way and let him do his job. Hopr that's the way it is. GM's are big \$\$\$ items.
7. Would probably improve my usage but would depend on outcome of upgrades. Hard to answer.
8. Never enough info. TV needs improvement but may be expensive to do. Lots of infor shown for previous week. Turns me off. Seperate ads from editorial content in Columns. It's very jumbled. Financial statement is beyond understanding. Can't believe it is written by a financial guy. Looks like Golf and Dining are going broke but can't tell. No expense to revenue percentages. no percent of actual to budget. Can't tell if it's bad ops or bad budgeting.
9. Attracted by golf, private community, services and how well almost everyone keeps up their property.

Pecan Plantation  
Long Range Planning

10. Yes

11. No reason not to recommend

12. What should be done.

-Consider software. I mentioned Janus. That could tie in everything to one database from finance to purchasing (I wonder how purchasing is done. Is ordering and receiving separate), to MARKETING to maintenance. I'm a big advocate of Marketing.

We also need better understanding of the LENMO agreement. We actually operate under two masters. The Board and the Developer. That may not be bad but to me it's an unknown.

Need for consistency in food service

Reduce turnover in staff

Be cautious in adding new positions

Renovate the dining room

Pool and pool bathrooms need work

Allow for appropriate budget for a good band when charging \$150/couple for the Christmas and New Year's Eve dances

We are in favor of a minimum fee at the club if service and food quality continue to improve

Concern about the gas compression station and animosity some members direct at the board prevents me recommending PP to others without qualification.

My thoughts on would I recommend Pecan to friends. My answer was absolutely yes, but there are two things I would "warn" them about.

1. If you are looking at a lot on an Anthony built pond, get a written guarantee that Anthony will keep the pond filled to the same level as the ponds on the golf course.

2. Access is bad and will get worse. The road to the front gate is bad, already heavily traveled, and alternate routes are not convenient. If there is a wreck, no telling how long you will sit and stew. Evacuation is effectively hopeless.

Today it is a Family Community. I realize that with the growth anticipated it will become more of a family community than it is today. I would like it to be more of a retirement community so that most of the amenities would be geared to retirees and their interests. Also think this might reduce the likelihood that dues would increase – fixed incomes for some retirees is an issue. Also believe that in the near future there will be more and more baby boomers retiring and that will be where the need will be.

Food and beverage should be greatly improved. Variety, not just the same tired thing week after week. Need to consider type of food people drive to Granbury to

## Pecan Plantation Long Range Planning

purchase. Need formal dining as well as casual. But food quality is a must. We should have great food available for less than if we went to Granbury to purchase it. Start there and advertise. Make sure what is being served is addressed. Not just "chicken night" – tell us how the chicken is prepared etc.

Feel that the membership should be asked more often before large expenditures and decisions that affect the quality of our lives here are made by the board. Do not believe that any board meeting should be held without providing time for the membership to ask questions and get answers.

Some of the reasons we chose to live here and invest money in our property are being lost to us already. We were told, when asked directly, prior to purchase of our home, that we could in our section keep our boat/trailer at our residence, since this was a monetary consideration regarding whether we would have to pay additional monies to store our boat. We were told yes, we could, by both the realtor and the clubhouse staff at Pecan. That is now being decided by a lawsuit which will affect us monetarily.

Nothing was mentioned to us that so many more homes were going to be developed eventually leading to the destruction of the pecan groves and the deer. This was what we thought set Pecan Plantation apart.

Yes there are barriers that would prevent me from referring Pecan Plantation to friends as I have heard that people living in Granbury are aware that things are changing here. I would not recommend someone to move here, because I would not want them to experience the disappointment that we have felt in some of the losses we are seeing occurring now and may experience in the future. I would also hope that in the future those who are making decisions regarding our community would in fact live in our community and thereby experience some of the loss we are facing personally.

The quality of life should NEVER be sacrificed to "improve" or provide additional amenities. A calm, unhurried existence should be possible. Instead of looking at how some may want their community to "appear." Every thought should revolve around how this would impact the quality of life for those in the community. This is OUR community and each one of us should have their voices heard and respected. What we want is what is important – not what people want that don't live here. Also believe that service on committees should be on a rotating basis. This would bring in new blood, new fresh ideas and would grow the community.

I think we all forgot to address one major issue and improvement to Pecan. That is the completion of the roads paving project. The roads were really getting to a deplorable state and I think would have effected Pecan's growth had they not been repaired. Road conditions were a very major topic of concern and many members doubted they would be repaired even after the assessment increase passed.

Pecan Plantation  
Long Range Planning

The Roads/Infrastructure Committee that worked on this did a super job in developing and overseeing the project. It was finished early and within budget. The smaller cul-de-sacs that were not part of the prime road contract have also been finished.

Look up at the entrance. Heavy cobwebs. Columns that need replacing.

What will be done long range to absorb the growth in people wanting to use what will then be inadequately small facilities.

Thank goodness Fitz was there to bring up the marina.

Still think we have an unbelievable bargain.

A service or addition I would like to have and have heard others express a desire for is a Newcomers Club, not just for women, but for ALL newcomers. When you work, it is very hard to meet people. There are already established "social" groups, and it is very difficult to attend all the events, hoping to connect with someone.

Also, Decordova has a new group that has formed for the middle-of-the-road crowd, from late 20s to 50s. This group is often overlooked socially in favor of seniors/retirees and youth events.

As far as governance issues, I believe that a bylaw change may be needed that states that board members must live here in Pecan, not just be property owners. I understand we have two members of our board who do not live here. I believe any city government requires their city council to be residents of the city they represent. I would think this would be akin to that.

I believe I mentioned this next suggestion near the beginning of the meeting and was told I should raise it when we talked about governance. Well, I forgot about it. I believe there should be term limits for committee members. Presently the committee members serve at the pleasure of the board and some have been on the same committee for years. The board is only going to appoint those to committees who are in agreement with their agenda. My neighbors indicated they volunteered when they first moved here to serve on committees, but they were basically told thanks, but no thanks. They are retired but quite active.

Again, the committee meetings, like the board workshops, need to be scheduled in the evening so everyone who wants to can serve. I believe you were in the agreement that it was a good idea that the board workshops should be scheduled in the evening. The committees should be no different. I would actually LOVE to be on the entertainment committee. Some of the band selections of this committee for the outdoor Street Dances have not been the best for outdoor events. If you get a chance, look at the Photo Gallery on the PPOA website. Click on the Volunteer Luncheon 2006 drop-down menu. Click on the individual photos and look at the



Pecan Plantation  
Long Range Planning

"demographics" of our committees. 99 percent are probably over the age of 60. As a representative sample, I have attached a photo of the Entertainment Committee.

Food and beverage losses have been astronomical. Three-quarters of a million dollars since the year 2000. I won't say any more about F & B because I know you're sick of hearing about it, but I do believe that you have to look directly to the GM and his mismanagement and more recently his appointment of his harem of assistants, which will lead to even more losses.

Why was a wife of one of the board members in our focus group? She was the one that kept piping in and defending everybody and everything. My guess is that there is a wife of a board member in every focus group, just like there is a wife or husband on most all committees. It doesn't seem that the people were chosen at random, as the General Manager's secretary was calling people telling people they hadn't been selected. Most weren't surprised because many of the ones that weren't selected have been vocal about things in the past. If I had known their phone numbers offhand, I would have called them to come up to fill the three empty spots that were there tonight. Also, I feel I was probably the youngest of the group tonight. I am 44. I felt I was one of the most vocal tonight as well. Please tell me the other focus groups had representation of the younger crowd. Is there that much apathy among the younger group that they didn't even respond to participate in these groups? Could it be that they know who runs Pecan, and they feel this whole process is a fiasco and that their voice is never heard, so why should they feel it will be heard now?

Focus Group 10/17 6PM

**How would you describe Pecan Plantation today? As a family community or a retirement community. Which would you prefer it to be and why?**

- Well, it is turning into a family community, but I would prefer it to be a family community with reins on your teenagers around here.
- I think that we feel, umm.. I kind of agree that, I like the idea that we have a family community I like the younger people here and that we are a true cross section of the population. But I think most of the mischief that we have can be attributed to the teenage factor that we have out here. So
- I don't know too many members that attend the pool parties baseball
- I think that is because there are no organized activities here for them
- I am sorry but that is a terrible bone to me. My child never had any really organized activities or things like that, and I kept her out of trouble. So I just....
- It is not up to the Members to keep the teenagers out of trouble.
- I am not sure that it is. I do not necessarily agree with that. There are probably a lot more retirees or working seniors over 55 than are families with children out here. I don't think it matter that it is a retirement community or family community. It is pretty much both. The young people don't bother me and I don't bother them. I notice that the club facilities, the swimming pool, the tennis courts, the things that the young children could take advantage of in the summer, they don't seem to. So from the stand point of activities, they are here the kids just don't use them. But I believe it is a more retirement community, than it is a family.
- I think for a long time it was a retirement center, people thought of it as that, but it is evolving to a family community more than anything else because the demographics have changed that much in age alone there are so many more young people. With all of the additional housing we have going in a lot of those folks are not retired and they are a long way from it.
- I have been coming to Granbury since 68 and what you had down here then was people who retired this is where they came and they settled here around Granbury because it was too far to drive to Ft. Worth everyday, back then. Well, now with the longer commutes and everything, people are starting to move down here and there is why we are getting the population boom down here because it is such a nice small community, but it is within commuting distance to Ft. Worth. So you are going to see more families move down here because an hour commute is nothing anymore.
- I feel as far as the family and retired and as far as the usage of the facility seems that the families are so busy on their own and commuting back and forth and they chose activities outside of Pecan that we don't utilize the

Pecan Plantation  
Long Range Planning

services up here as much. And the compass is not a geared to us as much. That's the way I feel.

- Seven years and the demographic have changed. There are a lot of young professionals getting out of the city. Mixture of personal friends that are not only retired but working professionals raising families.
- In the Women's Club we don't have very many young people because they are working.

**If there was one thing about the Club that you could change/improve, what would that be?**

- Get rid of the auto gratuity. Creates less motivation for the wait-staff to give good service. Employees say they really don't see that in their pay check.
- Parks and Beaches need improvement. The grass needs to be replaced. Ants are really bad.
- Security needs to be improved. People are being let in to go to the Brick oven without sponsoring member.
- Increase in security from midnight to 6 AM. See more security during the day and we need the security more in the evening and night. Security gate personnel are asleep on a regular basis in the wee hours of the AM.
- I would like to see the committee term limited. Members can't participate because all of the meetings are in the daytime and we work. Need to move the Committee meetings to evening same as Board Meetings.
- Food & Beverage: Service is lousy, food is just so-so. Waiting to get in and rooms are empty. Wait staff in uniforms are just standing around talking. Totally un-interesting menu items and the food is not fresh, it is reheated. And left over's used in the next days meals. The food here is consistently low. Can't believe that the loss is \$100,000 or more.
- The training here is not up to par. I like to be called by name, every club I have belonged to previously has called me by name.
- Disappointed member's because the food is so bad. Club's are not wanting to come here because the food is so bad and not coming back here because of it, bottom line. Even the clubs are losing members because of the bad food.
- Hours of the food service is inadequate. Nothing is consistent, the food is the worst that it's ever been. Shut down even when clubs are having functions here. This forces everyone, even our members to go into town for food. The menu's are changed and we are not notified. The 19th hole is open for lunch, but the ladies want a more upscale environment. It is dark and smell of athletes. Reservations are taken but you still have to wait around 45 minutes to get a table. The club is not serving fresh food. We have a chef heating up frozen food. The pricing does not match the current market in town.
- Everyone has an assistant. If they got rid of some of the assistants, then maybe they can afford to keep things open for lunch and afford to hire wait

## Pecan Plantation Long Range Planning

- staff. Wait staff needs training. Nonsmoking also add an affect on this. No one even checked what business that we lost by doing that.
- Most private clubs have a minimum per month. We don't want that because the quality is not here with our food. That will never pass. At one time this place was open and busy on Thursday, Friday and Saturday night.
  - Physical planning and utilization of the space we have. We need to clean out the areas that are not being used before we spend thousands of dollars on new spaces and remodeling. And maintenance is a big issue. Clean up the areas, kitchen, gazebo, patios add umbrellas. The Brazos room needs to be a bar. Redecorating again is a waste of our money. The oriental furniture in a Plantation building does not make sense.
  - We are adding new amenities, we are not doing the maintenance on what we have currently. The plants look nice but they don't fix the inside. Even the equipment in the administrative offices needs to be updated.
  - A fitness center would be great.
  - Another golf course would be great.
  - We need to get involved the city government.
  - We need an evacuation plan.
  - Our roads are not such that we can get out if we need to.
  - We may need to add another road.
  - A pool table in the nineteenth hole.
  - Live entertainment.
  - Events and activities produced by the club are excellent. Hopefully the Community Center will help keep the youth active and out of trouble. The teen room here is outdated.

### **How about governance of the management and the club?**

- The general membership does not have a voice. The vote is already taken before the meeting starts. There is no discussion, the vote is unanimous. There is no one there to question what they are doing. You have to attend the workshops to introduce new business. But they are held during the day when everyone is working.
- There are decisions being made to spend a lot of money on things like growing the administration. How long will it be before we have used up all of the reserves from the increase in dues assessed to the members? Manager after manager is hired, assistant after assistant is hired and nothing is getting better. I am not sure that it is good.

### **Rick: Shouldn't there be some sort of set increase in dues each month due to the rising cost of energy, etc?**

- No, cut costs, get rid of some overstaffing. We are hiring all of these new assistants and then they are closing the club down.

Pecan Plantation  
Long Range Planning

- Publication of the workshops and board meetings need to be more readily available to the members. It is so important to get the word out for all of the meetings. They have been the same day for ever. Well no- one knows about them. When are they? During the day, while everyone is working. So we need to have them in the AM and PM. Otherwise we don't have any power.

**Rick: If everything got fixed, that would happen with your use of the facility?**

- It would go up. That is, if the food gets better. All are agreed that usage will go up. Yes, we would not have to drive into town to get good food and service.
- We would rather come to the club.

**How do you feel about the current Communications in general?**

- It's smoke and mirrors. For example, even with the community center, we were told that Anthony's were paying for it and we would have to upkeep and man the facility. But, we ended up spending \$180,000 on finishing/furnishing the inside. Why doesn't the general manager and board of directors have a good relationship with the Anthony's? Why do they go behind our back to do stuff, why do we not know until after the fact? Why don't they come to the Management or Board before? Obviously they do not have a good working relationship with our group. Why does the management not know what the Anthony's are doing? I do not understand that relationship. They own the land so they can get away with it. And they don't have to ask us for anything. Shouldn't we court them so that we can get in the know?
- The website committee minutes have not been updated since 2003.
- There are e-mail the blasts they go out to members who give the management their addresses.
- All of the information that we need to know is not posted or available for the members. We have the web, columns, and email access.
- It was a whole lot worse, it is getting better, but it is still not right.

**What are some of the things that first attracted you to Pecan Plantation?  
What has changed better or worse?**

- Safety, security, and the country atmosphere. It was beautiful, when you drove in through the front gate. You could not just drive in.
- People were friendly all of the time. The people are still nice, the roads are better, but now I am worried about security.
- The car tag is another \$80,000.00 that was spent without a vote of the members. How do they do that? Okay here is another of those things that we don't know about!

Pecan Plantation  
Long Range Planning

- The service companies, maintenance and construction trucks can park in the street but I am not allowed to. And with adding residents it is going to get worse.
- Would you encourage anyone to buy here? NO, we want to keep it secret. It is still the best value for the money. We are all here to make this place the best it can be.

**Looking forward, anything you wanted to tell long range planning committee or your management?**

- Is there anything we can do to move the sewer treatment plant? Sometimes it is really bad. It's an a MUD facility, can't they do something about this. At least make it nicer with trees.
- Management treats us disrespectful, not like we are the owners paying their salaries.
- If we have a family reunion, we don't want to pay catering for food. (Community Center)
- We have to rent the room, and you can't bring in food.

**FOCUS GROUP III OCT 18th 9AM**

**How would describe Pecan Plantation retirement or family. Which do you want it to be and why?**

- I think it is primarily a retirement community, but changing to a family. I like the change.
- I disagree, I think it is more of a family community.

**If you could change anything about Community Services what would that be?**

- Last year and half all of the new services, the bank, store, shopping center, Doctors office, pharmacy has certainly improved the commute back and forth to town.
- Fire dept/EMS is top rated so that's good.
- The Marina is being neglected, it needs to be extended down to the water. Updated and remodeled not just maintained at the current level. Marina could be a much bigger draw to Pecan.
- Higher level of Security is needed internally. There have been issues of vandalism. There needs to be more patrols over the evening hours. They need more authority.
- Maybe we need a police department. The new gate is coming up in the next few months. It will be much more secure so people can't run the gate. There will be an article in the Columns in November. No major problems but it still needs to be looked at.

Pecan Plantation  
Long Range Planning

- We need an exercise facility and maybe an indoor pool.

**Food and Beverage:**

- Pecan needs to face up to the fact that what we have is going to be a losing game.
- Our Food and Beverage department is just not going to make money.
- We need to support it more.
- Turn over is a huge problem.
- Inconsistency is the biggest problem.
- Take off the automatic gratuity, it curbs the good service. In order to tip over the auto gratuity amount you have to slip the money to the person because if you put it on the tab it is split with the guy who is standing around not doing anything. I think that the better restaurants in town caused some of this. But if the food was better here and service better we would come here.
- Even the chicken buffet here is inconsistent. I think the food is being overcooked. Of course the volume or loss of volume could have something to do with that.
- I have never heard of a club that didn't have a monthly minimum for food service area. It may not go over well but maybe it could buy better people for service, and preparation.
- It takes a long time for bad food to recover.
- The 19th hole is not a good place to have small business lunches or social lunches. The upstairs is shut down and needs to be opened up again. The lunches there and even if it was the Brazos room was good. The only problem is that the specials were not advertised well.
- On a positive note the new staff in F&B is great. Have good ideas and care and are trying to make it better.

**Physical facilities:**

- We are in the process of renovations so this is all changing. Updated and new chairs, chandeliers, etc. The outside needs to be worked on. Maintenance on the pillars and painting, the carpet needs to be replaced. Our first impression is not up to par. Again, the marina is really bad. Update the grill area. Add deck.
- The parks and beaches children's equipment needs to be updated. The old stuff is hot to touch and there is no material to cushion a child's fall.
- Common areas are not being maintained. There a lot of lots that are overgrown that need to be taken care of.
- We still have a far better facility for the price than other places. Most people that come here are in awe of it.

**Activities and Events:**

- Need more activities for younger couples.

## Pecan Plantation Long Range Planning

- The entertainment committee does a great job. But it seems that they cater to their age group.
- There does not seem to be participation from the parents of the young adults and teens, because they are not here for the special events.
- Entertainment committee sets up special meetings on Sunday afternoons to accommodate working people.
- We are also competing with Granbury "proper" for participation.
- I think we don't really have the staff to handle more than what we are doing now.
- The ball fields and soccer fields are a waste of space no one is using them. Hardly any. That is because it is not open to the general public. Only members and a lot of the children here are only here in the summer visiting.
- But then, the stores here are allowing general public in. I don't think they should be let in. Any one who puts a business in Pecan you should know that you have to depend on the people within the gates or reciprocal clubs.

### **Governance:**

- People of Board and Committee's here deserve the praise of all of us for the sacrifices, time and community service made for our community.
- Management needs more authority and should not be micromanaged. Even the Management under the GM is micromanaged in my opinion. Everyone has good ideas and the micromanagement is making this inefficient.
- How has De Cordova done since they became a city? Do we need to become a city, would that benefit us?
- I think that is a different animal altogether. They did that to keep Granbury from taking over. Maybe in the 10 year plan we need to look at this.
- The communications as to what is going on inside coming out to the members is lousy. We hear the idea, and nothing is said until we are paying for it and implemented.
- 

### **If all of the changes you want are made what would happen with your usage of the club?**

- We would use it more, especially if the food is better. Maybe have less food on the buffet and have a small ala carte menu.
- Maybe we should have Mexican night, Italian night, etc.
- The club is closed on Sunday and we can't get here before the brunch service closes down or we would come to that after church.

### **What you do you feel about the current level of communications on major issues?**

- This is the sore subject. There are Board workshops and no one comes. It is right after the breakfast club, but they don't even come in.
- The Board Meeting minutes are not posted until they are approved a month after the meeting.



Pecan Plantation  
Long Range Planning

- If the Board is having these meeting and no-one is coming is that the Boards problem? No, but they need to do something to entice people in.
- I don't see very many surveys coming from the Board asking the opinion of the people. Well they don't do that because it costs too much to send them out and people don't send them back.
- The alternative would be to do an email survey with the questions and ask them to send the response back. Then at least everyone would know the topics being discussed or voted on. There is a way to communicate with everyone.
- We need to know what and when things are planned, before it happens.

**Communications in general:**

- The people that are sitting around complaining are not participating.
- No matter how you try, you are going to miss some of the people.

**What are some of the things that attracted you to Pecan Plantation and what are the things that have changed, for better, or for worse?**

- The clubhouse activities, a way to meet people, convenience and getting to know everyone brought us here. But that has gotten bad because the food is so bad now. The golf attracted us here.
- The ambiance of having a club environment.
- Golf, golf, golf.
- The overall amenities and cost is the best for the price.
- Cards, bridge clubs. So for me it is still great.
- Security was important to some but not all of this group as a factor for buying here. But because of the vandalism, it is more of an issue now.
- Changes, steadily and consistently improve and every amenity is getting better and better, except for the F&B area, since the dues increase passed. And, again the Marina needs lots of work.

**Would the primary things that attracted you be what you use to attract other people?**

- Yes, golf especially.
- So we need to add another golf course because it is hard to get a tee time now.

**Any area to keep you from recommending Pecan to others?**

- No recommend it all the time.

**Anything you would recommend to LRP?**

- Communications, renovations to outside, Marina.
- Golf expansion, exercise facility with an indoor pool or putting a balloon over the outside pool and add a hot tub, and an attached room with exercise equipment.

Pecan Plantation  
Long Range Planning

- Maybe, look ahead to maintenance with the amenities we are adding.
- Maybe buy Nutcracker.

**FOCUS GROUP IV OCT 18th 11:30**

**How would describe Pecan Plantation today a retirement or family. Which do you prefer it to be and why?**

- Primarily retirement, moving toward family but I would prefer for it to stay retirement.
- I am for diversity, however it is harder to make everyone happy.
- Started out retirement, Pecan is more than a country club, is more than a golf course, my sense is that more than 2/3's play golf but only ¼ use the club.
- I was attracted because of the diversity, but my preference is retirement.
- I am split 50/50.
- I find the equity of splitting cost of things here based on usage is not done. To me that is a big issue.

**If you could change something about Pecan for the better what would it be?**

**Community service:**

- Number of services here are provided for the county.
- Our property is impacted by what goes on around us.
- Subdivision and platting needs to be looked at.
- EMS and Airpark (second one) on each of these PPOA can't voice an opinion, we have to go with what the Developer wants.

**Food and Beverage:**

- Nothing I can suggest, maybe fix it up. The largest percentage does not use it anyway. I have been pleased with it (14% usage).
- Need continuity, too many people in and out over the years to keep good food and staff. Seems they have tried it all.
- We eat out a lot but not here.
- The more people that come, I think would cause the food to be better.
- The special events are wonderful, food is good and it is fun. You can't have an overabundance of fresh food when only a hand-full show up.
- When you narrow the time and narrow the menu then you get less people.
- I think it should be a place where you can bring friends and have a good meal and atmosphere, this place does not meet that for me.
- I am a bit disappointed. One thing that I think is primary to the failure is that we have an unrealistic goal.
- I am for a reasonable subsidy to help.
- What percentage is really concerned about the clubhouse? I imagine a very small percentage.

## Pecan Plantation Long Range Planning

- You will get what you want out of it when the people who use it, pay for it.
- We should separate the homeowners association from the Clubs, that way the people who want it pay for it.

### **Physical facilities:**

- Most people moved here for the golf, but I like the tennis, pool, etc and looking at the wonderful views.
- We should have fees for what the people use.
- I don't think we need to add any additional facilities.
- Why are we taking on more capital expenditures?
- If the Developer builds it he should manage it and staff it etc. or develop another association or sell it to another company to take care of it.
- Expansion has to be done to support the growth.
- Whenever more capital expenditures are added then the dues are going up.
- I see no value to the community financially with adding the facility if they have to raise our dues to pay for it.
- We have put a lot of money in to add things and we are not maintaining the things that we have. (Roads)

### **Activities and Events:**

- Seems like all that come to the events are the families and kids, the retiree's don't attend much.
- The dances don't have families come.
- With the Community Center I think that it will bring out more of the families. This will provide a place for the teens and children to keep busy.
- The clubhouse fills up these events too quick and you can't get reservations.
- Most of the functions revolve around a holiday, it occurs to me that we need a structured activity calendar for the kids. There seems to be a void in this area.
- It seems the events cater to a select group that are friends. I would like to see more family functions.

### **Governance:**

- Example from another club, they had the clubhouse that never succeeded, they became a city. They took the Association and kept it with the parks, marina and civic center. You had to be a member of this. This made the parks private. Then the government (city) that maintained the water, roads, schools. Fire/EMS operated out of the County.
- We have 5,000 members, and I think there should be a fact finding committee about this place becoming a city. The Association level is surpassed. We need to have more authority. We need a police department, false security with the guys standing at the gate.
- We would have to take the gates down then the County would maintain the roads.

## Pecan Plantation Long Range Planning

- Seems to me we are trying to fix things that are not broke.
- We don't have any crime so why do we need a police department.
- We have to support the facilities that are here and endorse and support the community. Why can't we charge a fee for each amenity that you want to participate in?
- The only benefit that is picked up is subsidy from the local companies that have towers, power plants etc.
- Limit Municipal Participation is what we need.
- The city council would provide subdivision ordinances, planning and zoning.
- The city would impose a tax to support the EMS system.
- City would enforce ordinances.
- The Association makes it hard for Management. It is impossible for the Management to make everyone happy.
- Management has to say yes, City's job is to say no.
- I think it needs to be on Long range plan. We are moving because the form of government here is inadequate and in long range will become a serious problem.
- Every year the Board has one year experience and ignore the Members. Each one of them has their own agenda.
- I don't think the structure is good, it allows the Developer to have too much authority.

### **If all of the changes you want are made what would happen with your usage of the club?**

- I would change my mind about moving.
- Usage probably would stay the same.
- Half of the people here don't realize the importance of what is going on or who is running.
- They have no idea that all of these issues exist.
- We need to educate the Members about all of the issues and the changes and effect. Most people just live here and love their surroundings.

### **What you do you feel about the current level of communications on major issues?**

- Workshop participation of this group – zero.
- The minutes are posted on the internet and they are probably a year behind.
- The best communications out here is the internet.
- Pecan News needs to be restarted. Journalism style notes on all meetings need to be posted weekly.
- Agenda emailed needs to include details and discussion of the items on it.
- Maybe we need to develop our own public newspaper. It needs to be a third party, unbiased report of what is going on.
- Everything that is published now is approved by the Association, Management, and Board so it is looked at skeptically.

Pecan Plantation  
Long Range Planning

- Does this make the Community more attractive, I will be selling someday and I made the investment in this area and property values have not grown. Houses are being built out here too cheap and so you get a brand new house cheaper than the guy who has been here for 10 years that is selling his.
- The property market is dampened because of continual development of land and housing.
- Maybe we need a neighborhood committee from each area to bring back the information to their area.

**Communications in general:**

- Because of poor communications, people are gossiping and giving incorrect information. It spreads like wild fire. And everyone jumps on.
- All and all I think they try hard to get the word out.
- The members do not attend or participate.
- The information is there people just don't know where to go to look for it.
- I think the Board Workshop and Board Meetings need to be televised on Channel 28. On certain issues the Board and Management has adopted a closed door meeting.

**What are some of the things that attracted you to Pecan Plantation and what are the things that have changed, for better, or for worse?**

- We like the diversity in people and lifestyle and the price.
- Everything was well taken care of.
- I would hate to see it turn into something that everyone else has. Plus it is beautiful. The amenities are good.
- Convenience, close to surrounding areas is why I moved here. Security is another reason.
- The marina is important to me and my grandchildren, we need to put the money that it makes back into it.
- After a long hard struggle the roads money, it passed and it was sorely needed.

**Would the primary things that attracted you be what you use to attract other people?**

Yes – Unanimous

**Any area to keep you from recommending Pecan to others?**

- Septic system failures. There should be no more development unless it is on sewer. And conversion of all septic to sewer.

**Anything you would recommend to LRP?**

- Look at all Facilities to make sure it can hold the capacity of the growing Membership.
- Develop a communications venue.
- Maintenance of all of the Facilities we currently have.

Pecan Plantation  
Long Range Planning

- Storm sewer system, ditches at side of street, not the lot drainage needs to be taken care of by the Association. Those that are maintained by members are not to code.

FOCUS GROUP OCT 18, 6:00 PM

**How would describe Pecan Plantation today a retirement or family. Which do you prefer it to be and why?**

I see it as a family community and diverse. And I like it. The evolution to the family community helps and the amenities they are adding makes it better. Probably about 40% a retirement community. The active retirement community the multiplicity and diversity is good. I want a community that involves all of the elements. I think it will probably be more retirement than family because of working parents and the commute.

**If you could change something about Pecan for the better what would it be?**

**Community service:**

I am dissatisfied with the service here in the Clubhouse. I am disappointed with the service every time here.

I think it should be used for area events not just Pecan. We need to maximize the Clubhouse for Member benefit. We need to use it for more outside events, weddings, catered services, meetings, prom parties etc. Somewhere in the next few years it all disappeared. We have decided not to use the facility because of the poor service.

I think that there are so many inconsistencies in the Management and in the food and service.

We feel that we don't have a voice in the way it is run and what is served and the service is not good.

Camps need to be updated.

At the RV park, services were taken away for example the ability to dump and I cant get my RV in and out of the marina.

There are a lot of things that need to be maintained instead of adding more amenities. There are specific instances where friends of mine and their children were not treated fairly. There were appeals are not handled correctly.

We can make this anything we want it to be. We want to protect and maintain it properly. It shows a lack of regard for our own property.

Security here is nothing more than psychological. As this place grows we are going to have to do something about it.

**Food and Beverage:**

We need to change the whole management structure to one that knows how to run a club. Reservations were made and the event was not properly prepared for. No linens on the table, no silverware and on and on. In the past the meeting rooms were not being bussed for events coming in. This was with previous personnel so I hope that it will get better. The expectations of the Club restaurants need to be

## Pecan Plantation Long Range Planning

communicated to the members. Good or bad. Most clubs put a monthly minimum on food and beverage. What ever is decided we need to know what it is. Additionally, we need to know what level we are to expect when are using the club. The kitchens are dirty, the door to the warehouse is open and the place is filthy. We don't use the talents of our members. We have some that are dieticians and we could use their expertise.

The club is not listening to the voice of the Members regarding the F&B department. Personnel changes are causing some of these problems. Unless we as an organization start standing behind the changes and endorse it monetarily then it just drops off.

### **Physical facilities:**

Key card access to security gates.

Marina area is not secure at all. The back gate to the marina needs card key access. The marina needs to be updated. The giant hole smells bad, the road edging is bad.

The building, marina, grounds and pool are all run down. Maintenance is not kept up. We have to take care of these. We feel this is the Boards fault. Some think that Management is at fault. It is always a challenge to get the best return of our money. We have a tremendous value here and majority of the membership are not educated with what is going on.

We are using our funds for new things and what we need to do is take care of the things we have.

We want to know where our money is going. (We have detailed reporting now but the members are not participating enough to know what is going on. We have a responsibility to educate ourselves to the financial aspects.)

The money is not being spent wisely. Every new Manager and Board wants to add something new to put their stamp on it, not take care of someone else's previous project. The RV section should be opened up to renters, to bring revenue in.

### **Activities and Events:**

We need to compete with De Cordova. We are inadequate in price and facility. When people come in they see the run down inn and don't want to have their functions here. Redirect: Couple of groups trying to build in-community events. Our idea is that we need to get the people in here spending money.

We need more volunteers to add their inspiration and ideas.

We need more healthful activities and children functions. Some of the ideas we have are just ignored.

One misconception is that it is not a close knit community and it is not. There are small groups that do events but they are catered for the retirement community not the youth. Our community is split by what people are interested in. R-Ver's, golfers, cards etc. There is an attempt to develop activities that transcend the diverse groups. But there are too many varied interests to make everyone happy.

### **Governance:**

They can offer a vote to the community on adding new amenities.

## Pecan Plantation Long Range Planning

There should be changes to the By-Laws that the Board of Governance should be made up of only people who actually reside here.

Rules and regulations that are being pushed down on everyone and there are some people who only own a lot to use the golf course. There are some things that should not be applied equally to home owners and lot owners. Politics stink here.

Voting should be changed to the bank lobby or location off property, the boxes and putting your number on the ballot on it makes casting ballot not anonymous.

We have got to look at a different way of governing, instead of voluntary Boards and Committees. Taxes could go up if we go to a City government.

The meeting times are not published when they are changed. You can't find out what happened until later. If you don't go to the meeting you miss the opportunity to change anything that has been done. Tenure of Committee and Board should be adhered to. Some members are running longer than the 3 year maximum.

The Board and number of members in the communities have agendas and the members are supposed to accept their ways. If not then they have to sue to be heard.

The city idea could be good or bad. Most cities require that you have to be a resident of that city.

By-Laws and Rules & Regulation's are too complicated. There should be an amalgamation of our documents that minimize the differences in the areas here.

The rules are not the same for everyone.

No consistency in enforcement of the Rules and C&R's. Good ole boys club mentality. It has improved but needs to get even better

### **If all of the changes you want are made what would happen with your usage of the club?**

I would come more and spend more. (majority) Some would come about the same amount of time.

### **What you do you feel about the current level of communications on major issues?**

We need to use the internet. (unanimous response) .

We have meetings and workshops but the Community members do not attend.

We don't have enough notice that a meeting is taking place. Or it changes and we receive notice the day of the meeting and it is too late to change plans to attend.

Emails and communications are sporadic, not reliable.

We need a vehicle to voice our opinions. (There is a discussion board on the internet but it is not anonymous.) We want to hear both sides without repercussion.

We need to seek the opportunities to input our opinions. Even the internet access and website has not been advertised that it is a tool members can use.

The information is not posted timely. By the time we get the information it is too late to change anything.

### **Communications in general:**

It has improved considerably and is better than it has ever been. There is an awful lot of useful information out there you just have to use it. The Columns is a good



Pecan Plantation  
Long Range Planning

tool too. But we need to tell everyone who doesn't know where to look for the answers.

**What are some of the things that attracted you to Pecan Plantation and what are the things that have changed, for better, or for worse?**

It wasn't a city. it was a community, the investment in real estate and the amenities was a good deal.

This is close to a country environment. I like the merchant village it saves travel time to town.

Secure and safe place with a diversity of things to do brought me here. We wanted the country environment with city amenities.

I don't feel that it is safe for the kids anymore. We need bike trails or build out roads. I like that they fixed the bridge and the roads are better.

There is no excuse for dirty restrooms and restaurants.

The noise pollution is a negative.

The pollution of our lake and river is a serious issue and we need to take care of these to protect our property values. (The County Commissioner is responsible for enforcing the pollution of lake and rivers and the noise pollution.

If you have issues you need to contact the people that can do something about it.)

Concerned about the growth, we have enough people now. Evacuation plan should be seriously looked at.

**Would the primary things that attracted you be what you use to attract other people?**

I do not recommend that anyone move here anymore. The politics are keeping people from moving here. Anytime we have a problem it ends up in the public news and that is affecting our property values. (This comes from the members, gossip.)

**Any area to keep you from recommending Pecan to others?**

**Anything you would recommend to LRP?**

Involvement of all of the members, give the members a voice. Dedicate a person toward a coordination of governmental relations. We need to coordinate the community, county and city. We need a permanent liaison to report to the members before there are problems not when problems arise.

I am impressed that the Long Range Committee hired ClubMark to try and pull the answers together.

I don't think the growth was thought out. We need alternate ways to evacuate.

## ***SWOT Analysis Guidelines***

---

### ***Strength & Weaknesses Evaluation***

In order to create future direction, in CMC's opinion, the Community must be objectively evaluated on several criteria before undertaking any effort at change. Rather than a comparison against another communities, the evaluation is against an ideal, or best case scenario. You should attempt to develop an overall SWOT analysis for the entire community as well as the following operational components. You can now use the focus groups as at least a cornerstone of public opinion on various elements of the community operations and services.

#### **Financial Strength**

- Debt & Availability of Capital Reserves
- Five-Year Capital Planning Document
- Budgetary Controls & Planning
- Cash Flow

#### **Operational Strength**

- Quality of Goods
- Quality of Services
  - Staffing
  - Training
- Perception of Members
- Perception of Community
- Value Perception

#### **Membership**

- Positive Growth or Maintenance of Membership Numbers
- Balance of Fees to Market's Ability to Pay
- Market Depth & Penetrability
- Competitive Balance to Market Share
- Membership Planning Document & Staffing
- Orientation Program

#### **Facilities**

- Adequacy for Membership & Community
- Condition of FF&E
- Presence of Replacement Program & Capital Plan
- Traffic Patterns & Efficiency of Operation
- Age & Décor

Pecan Plantation  
Long Range Planning

### **Golf Course (s)**

Playability for Membership  
Availability of Tee-Times  
Condition  
Long Range Capital Replenishment Program  
Efficiency of Operation & Costs

### **Governance**

Mission Statement  
Efficiency of Governance  
    Board Involvement  
    Committee Involvement  
    Staff Involvement  
Staff Empowerment  
Board & Committee Orientation Program

In developing an objective analysis of your facilities and aspects of the operation of your Community, you should go as deeply as possible into the various elements as outlined, as well as to add specific areas that may affect your Community's operation, finances, growth or perception within the overall community. This document should lay the foundation for future direction.

The ultimate objective is to create a strengths and weaknesses analysis that can clearly point out the direction necessary for the Community to go in order to better position itself to serve non only its existing members, but for future generations as well. This is of major importance to Pecan Plantation as the demographics are shifting and the Community must position itself not only for the needs of the existing members but also for future generations as well.

### Strategic Planning Worksheet

This worksheet may be used to determine the strengths, weaknesses, opportunities and threats to the Community in general and/or to respective sub-areas or departments within the Community.

**Area Surveyed** \_\_\_\_\_

#### Strengths

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_

### Strategic Planning Worksheet

This worksheet may be used to determine the strengths, weaknesses, opportunities and threats to the Community in general and/or to respective sub-areas or departments within the Community.

**Area Surveyed** \_\_\_\_\_

#### Weaknesses

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_

### Strategic Planning Worksheet

This worksheet may be used to determine the strengths, weaknesses, opportunities and threats to the Community in general and/or to respective sub-areas or departments within the Community.

**Area Surveyed** \_\_\_\_\_

#### Opportunities

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_

### Strategic Planning Worksheet

This worksheet may be used to determine the strengths, weaknesses, opportunities and threats to the Community in general and/or to respective sub-areas or departments within the Community.

**Area Surveyed** \_\_\_\_\_

#### Threats

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_

## ***The Final Document***

---

Over the course of this study CMC was not charged with development of the strategies, goals, or action plans. However, to create a document that can be presented to the membership as the roadmap for the future of Pecan Plantation, you will need to take additional time and coordinate how best to create a final document that can be presented to the community and that can endure the test of time as a living document. The following recommended guidelines for submission and completion of the final document are prepared as an example for what a final document could look like and the coordination process required to get there.

### ***Pecan Plantation Strategic Planning Committee***

#### ***Suggested Format for Submissions***

The importance of submitting each Sub-Committee document in a similar fashion is obvious. By incorporating a template as to how each Sub-Committee should write their respective recommendations, you will have a consistent and uniform plan once we are completed. Please review the following guidelines and feel free to contact Rick Coyne at Community Mark Corporation if you have any questions. (972) 788-4848.

#### **Strengths, Weaknesses, Opportunities & Threats to Current Operations**

Provide a SWOT analysis of the overall process that your Sub-Committee is studying, as it currently exists. This is the process we will use to demonstrate to the membership at large the current conditions and the need to make changes.

#### **General Position Statement**

Provide a brief description, as a summary of the SWOT, as to where the Community is today relative to the Sub-Committee's area of responsibility.

#### **General Vision Statement**

Provide a brief description, as a summary of the SWOT, as to where the Community needs to be relative to the Sub-Committee's area of responsibility.



## Summary of Goals

Provide a summary of all goals that the Sub-Committee has recognized and will present as part of the Strategic Planning process. If possible, prioritize the goals in order of importance.

### Individual Goals – First State the Goal

- Where We Have Been – Provide a Brief Statement for Each Goal
- Where We Need to Be – Provide a Brief Statement for Each Goal
- Recommendations – Provide a Narrative as Thorough as Necessary to be Understood and to Develop an Implementation Process
  - Critical Success Factors
  - The Process Required to Achieve Your Goals
  - Financial Requirements<sup>2</sup>
  - Responsibility for Completing the Goal (Department Head, GM, etc.)
  - Timelines – Prioritize and Set Dates

**IMPORTANT!** If any goal requires capital or expenses in excess of what is currently budgeted, the Sub-Committee must interface with the Finance Sub-Committee so that the goal may be scrutinized from a financial perspective as currently doable, or set as a future event as cash flow increases or other means of capitalization become available.

### Submissions by Sub-Committees

Please submit your work in the above format in Microsoft Word. This will prevent the necessity and expense of having the work retyped. The Community has an electronic copy of the report as submitted by CMC. If there is research in the study that you would like to include in your Sub-Committee recommendations, feel free to cut and paste.

### Why This Process is Necessary

As you have completed the Strategic Planning work done by the Committees, you will have completed the first step in the overall process. The hard work is now in getting the rest of the membership to buy into your findings. The more that you can point to the studies and other factual data, the easier it will be to demonstrate the validity of your findings, and hence, consensus on the need to take your specific recommendations. The more detail we provide in the first step, the easier it is in the second step.

---

<sup>2</sup> If the goal requires capital to accomplish or an increase in expenses, the goal should be discussed with the Finance Sub-Committee and/or other Committees, i.e., Membership so that the goals may be placed in a priority as capital is raised by the Community by whatever means it may deem appropriate.

Pecan Plantation  
Long Range Planning

In order for the process not to be viewed as another "agenda" of the Board, the members must have buy in to the process, the data and the conclusions. As necessary, tie the recommendations back to specific data that may have been presented in their operational and market audit.

**Timing**

In order to gain the feedback and input of the other Sub-Committee volunteers, please try to have your Sub-Committee reports, in the format as described, in the hands of the CMC folks at least five days prior to the next meeting.

## ***SAMPLE SUB-COMMITTEE REPORT – GOLF SUBCOMMITTEE***

### **General Position Statement**

XYZCC is one of most prestigious clubs in NC. XYZCC's golf courses were designed by two world renowned architects. XYZCC has the potential to reestablish itself in the top 10 courses in the area (renovation). The courses offer a nice contrast in architectural style. However, the golf course maintenance budget does not support the conditioning expectations of members. The course needs renovation to update greens and architectural characteristics consistent with the prestige and reputation of XYZCC. The A course was renovated in the late '90s, and the infrastructure is generally in good condition with some incremental investment required for bunkering, landscaping, ponds, creeks, practice facility, etc. With two 18 hole layouts, members always have the option to participate in Community sponsored events or pursue their own game at the other golf course. While the golf facilities are generally good, the golf courses are underutilized.

The Board has appointed a Golf Committee to address overall golf policy and play. The Golf Committee collaborates with the golf professional staff and greens superintendent to implement programs. XYZCC has a rich community history dating back to 1909. The Community's two golf courses are located on prime real estate which is convenient to member population. The distinctively different courses offer a challenge to low handicappers, enjoyment for all caliber players, and promotes family and junior golf as well. XYZCC members appreciate and honor the traditions of the game. The golf environment supports all levels of skill, age, and gender.

### **General Vision Statement**

Five years from now, XYZCC golf facilities, programs, services, and reputation will be on a par with the best private clubs in the country. All categories of members (seniors, ladies, men, and juniors) actively enjoy and participate in XYZCC events and programs. XYZCC is their FIRST choice for golf activities. Members are proud of their facilities, staff, and programs. Members take advantage of courses, practice facilities, instruction, and clubhouse services. Guests view a round of golf at XYZCC as a highly valued experience. Camaraderie and rapport among members is celebrated and encouraged. An inviting atmosphere is reinforced by members, golf programs, staff services, and facilities. The history of XYZCC and the game of golf are honored, preserved, and valued by the membership.

### **Summary of Goals**

Pecan Plantation  
Long Range Planning

**Goals not requiring capital or increase in operating budget....**

1. Create a XYZCC golf management system and organization that deliver well orchestrated programs, events, tournaments, and daily playing conditions. Optimize resources and budget. Identify capital and operating budget requirements each year.
2. Increase the level of members' participation in golf programs and events across all membership categories (seniors, men, women, and juniors).
3. Increase play at B and A courses to 48,000 rounds per year (or "optimal" number which balances financial objectives with members' golf course accessibility expectations) through increased member play, guest play, tournaments, and outings.
4. Celebrate XYZCC's rich history and traditions.
5. Foster an inviting, friendly golf atmosphere at XYZCC.

**Goals requiring capital or increase in operating budget....**

1. Improve golf course playing conditions at both courses that meet or exceed XYZCC Conditioning Standards on a consistent, daily basis.
2. Improve A infrastructure, e.g. ponds, creek beds, drainage, traps, forestry, landscaping, and practice facility.
3. Renovate B course and practice facility as defined by Arthur Hills & Assoc's. Renovate maintenance facilities.

**Increase the level of members' participation in golf programs and events across all membership categories (seniors, men, women, and juniors).**

**Actions....**

1. Establish a Junior Golf Program Committee that revamps the Jr Golf program as it exists today. Design programs to attract younger players, develop golf skills through middle school, and create opportunities for 17-23 year age group through competition and events such as a Jr. Member-Guest. The Director of Golf will hire a seasonal Director of Junior Golf Programs to run day camps, interclub events, weekly tournaments, etc. Fund with fees.
2. Establish Men's Golf Association that promotes men's golf. Ideas for activities include: monthly dinner meetings with programs (USGA rules, PGA

## Pecan Plantation Long Range Planning

pro during CCG, etc), social events, community fitting events and community demo day, Pelz school, "walk the range line" instruction tips, repair divots party, etc. Association's annual dues will fund events and programs. MGA events will increase clubhouse utilization and revenues. MGA is also responsible for conducting men's community tournaments such as Spring Match Play, President's Cup, etc. The Men's Community Championship (see 'F' below) will be run by golf professional staff as will all other Community Championships. Explore area Inter-Community competition or annual tournament. Develop "main events" for spring, summer and fall, e.g. night golf with margaritas, Cajan cook out, couples events. Link golf activities with entertainment events as appropriate (Member-Guest).

3. Continue Women's Golf Association similar to existing Association. Expand program to include 9 hole option. Explore how to recruit beginners, instruction, etc. Cater to all skill levels and golf interests, e.g. competition, social, lunch, just learn the game, or additional draws such as a fashion event. Schedule special events and tournaments.
4. Establish Senior Golf Association to promote "One Day" tournaments, mid-week events, interclub events, etc. Link with Men's Golf Association to avoid duplication.
5. Golf professional staff works closely with each XYZCC Golf Association to help create and execute golf programs, events, and activities.
6. Golf professional staff runs all Community Championships under the direction of the Golf Committee, and they are separate from Association events.
7. The Juniors', Men's, and Senior's Golf Associations executive committees are nominated each year by the Golf Committee and approved by the Board of Directors. The 2004 Association committee appointments need to take place during 4Q 2003. Women's Association already exists and the executive committee change process is already in place and needs no change.
8. Associations collaborate with XYZCC Entertainment Committee and community marketing activities to promote all golf activities.

**Increase play at B and A courses to 48,000 rounds per year (or "optimal" number which balances financial objectives with member accessibility) through increased member play, guest play, tournaments, and outings.**

### **Actions....**

1. Golf Committee does financials to determine the "optimal" level and blend of member, guest, and outing rounds. Factor in the expected increase in

## **Pecan Plantation Long Range Planning**

member play due to golf programs and actions (Goal #2). Establish "rounds per year" objectives to increase from current level to optimal level over next five years.

2. Establish guest rounds and outings rounds policies which drive necessary volumes to close financial equation. Ensure that the outings policy is consistent with private community atmosphere and member access to golf course facilities.

### **Celebrate XYZCC's rich history and traditions.**

#### **Actions....**

1. Document the history of golf at XYZCC and communicate to members. XYZCC Golf Committee commissions this work. End result is publication of a book or brochure about XYZCC history for member's reference and enjoyment. It will also serve as an orientation item for new members.
2. Designate an area at Irving Park Community House which displays XYZCC Golf History. Appoint "curator" and "historian" from XYZCC staff or Golf Organizations. XYZCC Golf Committee initiates this action.

### **Foster inviting, friendly golf atmosphere.**

#### **Actions....**

1. Establish a guest welcome process to include such things as: bag tag, shoe shine, locker assignment, etc. Golf Staff responsible for defining and implementing this process.
2. Each Golf Association will develop events for new members. This will include a group of volunteers who play a round of golf with new members. Structure events where new members are the focus. Hold welcome parties periodically. Recruit new members to join Associations and participate in events. Each Golf Association is responsible for implementing these actions.
3. Hold formal "New Member Welcome Events" for new members which are conducted by the golf staff. Included will be such things as a tour of golf facilities, schedule of events and tournaments, and Associations orientation package.

### **Improve golf course playing conditions at both courses that meet or exceed XYZCC Standards on a consistent, daily basis.**

#### **Background....**

## Pecan Plantation Long Range Planning

XYZCC Conditioning Standards have been established for both the A and B courses for greens, fairways, tees, rough, bunkers, and general golf course landscaping. Each course has standards for mowing heights, mowing frequency, green speed, divot repair, aerification, bunker depth, bunker raking schedules, etc. The Green Committee and the Head of Course Maintenance review these standards annually to ensure member enjoyment and course playability.

Current budget, staffing and infrastructure constraints do not allow consistent adherence to the XYZCC standards. Examples include inconsistent green speed during the heat of summer, inability to quickly recover from inclement weather, inability to repair ball marks daily, mowing frequency less than required to maintain consistent fairway heights, etc.

Benchmarking studies comparing XYZCC to other area clubs show that golf course maintenance budgets for the B and A courses are considerably less than peer operations. Measured on this basis, XYZCC budget shortfall is in the 30% to 40% range.

To achieve XYZCC golf course conditioning standards, it is estimated that the current annual A budget would require an increase from \$580,000 to \$750,000. The B course cannot reach XYZCC Standards given the current foundation of the greens. They are old and require renovation. An increase from current budget of \$605,000 to \$750,000 would yield improved conditions. But, XYZCC standards cannot be met until renovation is completed. The eventual budget requires an increase to \$850,000.

Today, limiting factors to achieving XYZCC Conditioning Standards are budgets and infrastructure.

### **Actions.....**

1. Increase A staffing and operating budget to \$750,000 per year which will meet Standards. Current budget is \$580,000. Increase budget (today's dollars) in 2004 to \$650,000; \$700,000 in 2005; and \$750,000 in 2006. Green Committee and Head of Course Maintenance will account for how moneys are spent and expected impact on conditioning by year.<sup>3</sup>
2. Due to inadequate B infrastructure (greens), only incremental improvement in conditions can be achieved in the near term. XYZCC Standards can only be achieved after renovation. Current budget is \$605,000 per year. To maximize conditions given the existing infrastructure, increase 2004 budget to \$675,000 and \$750,000 in 2005. After renovation, increase to \$850,000 (today's dollars) in order to meet Standards.

---

<sup>3</sup> In CMC's opinion, based upon Committee input and Board approval, this the responsibility of the C.O.O.

Pecan Plantation  
Long Range Planning

**Improve A infrastructure, e.g. ponds, creek beds, drainage, traps, forestry, landscaping, and practice facility.**

**Actions....**

Green Committee will develop a capital budget to address needs at A. It is estimated to be \$400,000 spread over 2004, 2005 and 2006. Additional analysis of cost estimates is required. This amount does not include reworking the irrigation system which would eliminate the dependency on city water. This may or may not be needed, so it was not included in requirements.

**Renovate B course and practice facility as defined by Arthur Hills & Assoc's. Renovate maintenance facilities (barn area) by raising \$4m over next three years.**

**Actions....**

The Board of Directors will establish the B Renovation Capital Resources Committee to develop a finance strategy to raise the \$4,000,000 necessary for renovations from the fall of 2006 to the fall of 2007. This committee should also consider areas not included in renovation such as barn maintenance area, regrassing roughs, practice area, irrigation (well), landscaping, etc. Some funding ideas include:

1. Solicit existing membership for voluntary contributions via capital fund drive.
2. Membership Drive for initiation fees.
3. Explore "environmental improvement" federal funding.
4. Enlist USGA and CGA for funding ideas.
5. Financing options.
6. XYZCC develops #4 practice range land.
7. Contribution with naming opportunities.

Establish Caddy program with local university golf teams.



## ***Worksheets***

---