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The Monthly Meeting of the Strategic Planning Committee of the University Park Recreation District will be held on **Wednesday, January 14, 2026 at 3:00 pm** at the Business Offices located at 8301 The Park Boulevard, University Park, FL 34201 and or virtually.

Meeting ID: 873 9095 1556 **Passcode:** 765455

Join meeting via Zoom:

<https://us02web.zoom.us/j/87390951556?pwd=8vthWiardxaNmhNnXQevsA35GKZVGr.1>

Strategic Planning Committee Meeting Agenda

Updated 01/09/2026

Organizational Matters

- Call to Order
- Roll Call to Confirm Quorum
- Public Comment Period [for any members of the public desiring to speak on any proposition before the Committee]

Administrative Matters

1. Approval of 10/20/25, 11/06/25, 11/12/25 and 12/10/25 meeting minutes.

Old Business

1. Update on RFP

2. Update on UPCA collaboration request
3. Update on UPCA/UPRD/PBM poster concept

New Business

1. Chair's Report: Visit to Heron's Glen
 - a. Brief update and key takeaways from the Chair's visit.
2. Consideration of an Online Resident Feedback System
 - a. Discussion of a proposed online grievance and suggestion platform to increase resident engagement and gather input on the future direction of the HOA and Club.
3. RD Request: Review current membership demographics to assess how an aging membership may impact overall membership levels in the coming years.
 - a. Discuss potential strategies to adapt to changing demographics, including the consideration of a senior membership category and opportunities to convert residents who are not currently full members.

Next Meeting Scheduled

Date	Meeting Type	Time	Location	Note
February 11, 2026	Strategic Planning Committee Meeting	3:00 pm	Business Office	In person or by Zoom

Strategic Planning Committee Member Agenda Requests & Public Comments

Adjournment

Meeting Minutes for Approval:

10/20/25, 11/06/25, 11/12/25 and 12/10/25

MINUTES OF MEETING

UNIVERSITY PARK RECREATION DISTRICT STRATEGIC PLANNING COMMITTEE SPECIAL MEETING

Monday, October 20, 2025

3:00 pm

Business Offices

8301 The Park Boulevard, University Park, FL 34201

Strategic Planning Committee Members present in person or via Zoom:

Jim Freedman	Chair
Ronni Loundy	Vice-Chair
Barbara Somma	Secretary
Ken Schreder	Committee Member
Steve Swanson	Committee Member

Also, present in person or via Zoom:

Sally Dickson	Chair – UPRD Board of Supervisors
John Fetsick	General Manager – University Park Country Club
Vivian Carvalho	District Manager – PFM Group Consulting LLC
Kwame Jackson	Assistant District Manager – PFM Group Consulting LLC
William McMahon, Sr.	Founder - McMahon Group, Inc.
David Dew	Vice President of Club Consulting - McMahon Group, Inc.

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call

The meeting was called to order at approximately 3:00 pm. Those in attendance are outlined above.

Public Comments

No members of the public requested to speak during the public comment period.

SECOND ORDER OF BUSINESS

Review of McMahon Group Strategic Planning Proposal

The Committee reviewed the McMahon Group’s strategic planning proposal, with David Dew and William P. McMahon, Sr. presenting an overview of the firm’s methodology, experience with private clubs and community districts, and the proposed phased approach to strategic planning. The discussion addressed the distinction between a strategic plan and a master plan, emphasizing that the strategic plan focuses on long-term direction, governance, financial sustainability, member experience, and prioritization, while physical facilities are addressed within a broader strategic framework. The presenters outlined the four proposed phases, including foundational alignment, member survey research, strategic plan development, and board and member engagement. Committee members asked clarifying questions regarding scope, timeline, member engagement, survey fatigue, governance considerations, and how previous surveys and capital planning efforts would be incorporated. The discussion also acknowledged the unique structure of the Recreation District, recent capital investments, and the importance of transparency and member communication throughout the process.

The next upcoming meeting:

Date	Meeting Type	Time	Location	Note
November 12, 2025	Strategic Planning Committee Meeting	3:00 pm	Business Office	In person or by Zoom

Strategic Planning Committee Member Requests & Public Comments

Committee members discussed next steps, including the anticipated scheduling of initial planning meetings, the importance of aligning committee and board expectations, and ensuring clear communication to the membership regarding the purpose and value of the strategic planning effort.

No additional public comments were offered.

Adjournment

The meeting was adjourned at approximately 4:30 pm.

MINUTES OF MEETING

UNIVERSITY PARK RECREATION DISTRICT STRATEGIC PLANNING COMMITTEE SPECIAL MEETING

Thursday, November 6, 2025

10:00 am

Business Offices

8301 The Park Boulevard, University Park, FL 34201

Strategic Planning Committee Members present in person or via Zoom:

Jim Freedman	Chair
Ronni Loundy	Vice-Chair
Barbara Somma	Secretary
Ken Schreder	Committee Member
Steve Swanson	Committee Member

Also, present in person or via Zoom:

Sally Dickson	Chair – UPRD Board of Supervisors
John Fetsick	General Manager – University Park Country Club
Jennifer Kakretz	Executive Assistant - University Park Country Club
Vivian Carvalho	District Manager – PFM Group Consulting LLC
Various Audience Members	

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call

The meeting was called to order at 10:00 am by Jim Freedman. Those in attendance are outlined above.

Public Comments

There were no public comments at this time.

SECOND ORDER OF BUSINESS

Discussion – history of how we got here; how a Strategic Plan differs from our Master Plan.

Mrs. Sally Dickson addressed confusion regarding the strategic plan and master plan differences. The committee discussion focused on distinguishing between the strategic plan and the master plan:

History of the Master Plan:

- The Master Plan was initiated in 2001 after the turnover and the availability of bond funds.
- The process involved hiring Folly Bryant and Kimley Horne to create the Master Plan.
- These firms conducted focus groups, polling, and data gathering to develop a plan for the campus, focusing on projects like pickleball courts, dining areas, and other facilities.
- The resulting Master Plan provided a comprehensive list of potential brick-and-mortar projects. Due to funding limitations, the Board selected priority items for implementation based on community input.
- Those selected items became the Capital Improvement Plan, funded through bond issuance and implemented over time.

Differences Between Strategic Plan and Master Plan:

- The Master Plan addressed physical infrastructure projects and facility improvements.
- The Strategic Plan encompasses broader, long-term considerations, including financial direction, membership categories, and overall community goals.
- The Strategic Plan is intended to guide future priorities rather than revisit or replace the Capital Improvement Plan.

Clarifications:

- The Strategic Plan will build upon prior planning work and consider updated cost estimates and evolving needs.
- Community input and consultant engagement will be central to the Strategic Plan development process.

- The committee noted the importance of clearly differentiating the Strategic Plan from the Master Plan to reduce confusion among residents and members.

THIRD ORDER OF BUSINESS

Develop RFP requirements for consulting services

The committee discussed the development of RFP requirements for selecting a consultant to assist with the Strategic Plan.

Purpose of the RFP:

To engage a consultant to assess the current state of the community, conduct competitive and SWOT analyses, and provide recommendations to inform the Strategic Plan. The consultant will review existing materials, prior surveys, financial records, governance documents, and membership demographics.

Key Components of the RFP:

- **Assessment of Current State:** Review of existing materials, membership history, and relevant data.
- **Competitive Analysis:** Benchmarking against comparable country-club communities and identifying factors contributing to successful or struggling clubs.
- **SWOT Analysis:** Review of organizational strengths, weaknesses, opportunities, and threats, including financial and operational considerations.
- **Communications Plan:** Development of a strategy for gathering community input and communicating findings to residents and members.
- **Recommendations:** Identification of areas for improvement and investment.

The committee agreed to remove overly detailed sub-requirements to maintain flexibility.

The RFP will focus on broader categories, including approach/process, communications plan, and recommendations.

Evaluation Criteria:

The committee developed a decision matrix to evaluate proposals based on pricing, approach/process, past experience, creativity, deliverables, and communications plan.

Two additional criteria—Approach/Process and Communications Plan—were incorporated into the evaluation model.

Next Steps:

The RFP will be finalized with the revisions discussed. The finalized RFP will be submitted to the District Manager for placement on the next RD Board agenda. The RD Board will review and approve the RFP prior to publication.

FOURTH ORDER OF BUSINESS

Develop a decision matrix to rank and evaluate vendor responses

The committee discussed the development of a decision matrix to rank and evaluate vendor responses to the RFP. Key points include:

Purpose of the Decision Matrix:

- The matrix provides a structured and objective way to evaluate vendor proposals based on specific criteria.
- It ensures consistency in assessing the strengths and weaknesses of each proposal.

Evaluation Criteria:

The matrix includes the following criteria:

- **Pricing:** Cost of services.
- **Approach/Process:** The methodology and process proposed by the vendor.
- **Past Experience:** Vendor's track record and relevant experience.
- **Creativity:** Innovative ideas and solutions presented.
- **Deliverables:** Quality and clarity of the proposed outcomes.
- **Communications Plan:** Vendor's strategy for engaging and informing the community.

Two additional criteria were added during the discussion: "Approach/Process" and "Communications Plan." Each criterion will be weighted based on its importance to the decision-making process. Vendors will be scored on each criterion, and the scores will be totaled to determine the best fit. The matrix allows for subjective evaluation within each criterion, ensuring the committee can account for nuances in vendor proposals. The committee agreed that the matrix should be finalized and included in the RFP package so vendors understand how their proposals will be judged.

Next Steps:

The finalized decision matrix will be submitted to the District Manager along with the RFP document. The committee will use the matrix to evaluate proposals once they are received.

The next upcoming meeting:

Date	Meeting Type	Time	Location	Note
November 12, 2025	Strategic Planning Committee Meeting	3:00 pm	Business Office	In person or by Zoom

SIXTH ORDER OF BUSINESS

Adjournment

The meeting was adjourned at 11:37 AM.

MINUTES OF MEETING

UNIVERSITY PARK RECREATION DISTRICT STRATEGIC PLANNING COMMITTEE SPECIAL MEETING

WEDNESDAY, NOVEMBER 12, 2025

3:00 pm

Business Offices

8301 The Park Boulevard, University Park, FL 34201

Strategic Planning Committee Members present in person or via Zoom:

Jim Freedman	Chair
Ronni Loundy	Vice-Chair
Barbara Somma	Secretary
Ken Schreder	Committee Member
Steve Swanson	Committee Member

Also, present in person or via Zoom:

Sally Dickson	Chair – UPRD Board of Supervisors
John Fetsick	General Manager – University Park Country Club
Jennifer Brown	Executive Assistant - University Park Country Club
Various audience members	

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call

The meeting was called to order at approximately 3:00 pm. Those in attendance are outlined above.

Public Comments

No members of the public requested to speak during the public comment period.

SECOND ORDER OF BUSINESS

Administrative Matters: Approval of Meeting Minutes for 9/29/25 and 10/8/25.

The Committee reviewed the draft meeting minutes from the September 29, 2025 and October 8, 2025 meetings. Discussion was held regarding revisions to the September 29, 2025 minutes to clarify language related to the Business Plan. A motion was made to approve the September 29, 2025 minutes as amended and the October 8, 2025 minutes as presented. The motion carried unanimously.

THIRD ORDER OF BUSINESS

Review of UPCA/UPRD/PBM Organizational Structure

The Committee reviewed the organizational structure of University Park Community Association, Inc. (UPCAI), University Park Recreation District (UPRD), and Park Boulevard Management (PBM). Discussion focused on the distinct roles and responsibilities of each entity, the separate governing boards, and the contractual and operational relationships among them. Clarification was provided regarding management reporting lines, the Mutual Cooperation Agreement between boards, and how the organizational structure supports both residential and club operations.

FOURTH ORDER OF BUSINESS

Review of Focus Groups and Master Plan Historical Files

The Committee reviewed historical materials related to prior focus groups, surveys, master planning efforts, and capital planning documents. Discussion addressed the timeline of past community engagement, including surveys conducted during the transition to the Recreation District, prior strategic and business planning efforts, and the use of these materials as background reference for the current strategic planning process. It was noted that these historical documents are intended to inform context and understanding rather than predetermine outcomes of the current strategic plan.

FIFTH ORDER OF BUSINESS

Discussion of Involving UPCA Board and Neighborhood Chairs in Strategic Planning

The Committee discussed potential methods for involving the UPCA Board of Directors and neighborhood chairs in the strategic planning process. Discussion focused on information sharing, transparency, and appropriate engagement while maintaining the advisory role of the Strategic Planning Committee and compliance with Sunshine Law requirements. Mrs. Janette Gatesy, a UPCA Board Member, was present in the Zoom audience and was given the opportunity to speak. Mrs. Gatesy clarified that the Chair Council is separate from the UPCA Board. Although the Chair Council does not directly report to the UPCA Board, the committee agreed, as a courtesy, to consult with the UPCA Board prior to engaging the Chair Council in any strategic planning efforts.

The next upcoming meeting:

Date	Meeting Type	Time	Location	Note
December 10, 2025	Strategic Planning Committee Meeting	3:00 pm	Business Office	In person or by Zoom

Strategic Planning Committee Member Requests

Committee members were provided with the opportunity to raise additional items or comments. General discussion addressed future meeting scheduling and the continued review of background materials as the strategic planning process moves forward. No formal requests or actions were made.

Adjournment

The meeting was adjourned at approximately 4:30 pm.

MINUTES OF MEETING

UNIVERSITY PARK RECREATION DISTRICT STRATEGIC PLANNING COMMITTEE MEETING

WEDNESDAY, DECEMBER 10, 2025

3:00 pm

Business Offices

8301 The Park Boulevard, University Park, FL 34201

Strategic Planning Committee Members present in person or via Zoom:

Jim Freedman	Chair
Ronni Loundy	Vice-Chair
Barbara Somma	Secretary
Ken Schreder	Committee Member
Steve Swanson	Committee Member

Also, present in person or via Zoom:

John Fetsick	General Manager – University Park Country Club
Jennifer Brown	Executive Assistant - University Park Country Club
Vivian Carvalho	District Manager - PFM
Kwame Jackson	Assistant District Manager - PFM

Various audience members

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call

The meeting was called to order at approximately 3:00 pm. Those in attendance are outlined above. Mr. Swanson joined remotely via Zoom, all other committee members were in person at the Business Offices.

Public Comments

The public comment period was opened. Mr. Dean Matt addressed the Committee regarding recent public records requests. Committee members advised that these matters

were outside the scope of the Strategic Planning Committee and more appropriately addressed at the District Board level.

Mr. Matt then focused his comments on strategic planning, stating that the District lacks a current five-year plan and asserting that both the Strategic Planning and Finance Committees have responsibility for ensuring such a plan exists. He requested that a comprehensive five-year plan be developed in compliance with the charter and that, if a strategic planning firm is retained, it be directed to review the capital plan.

SECOND ORDER OF BUSINESS

RFP Update

The Committee received an update from Mr. John Fetsick on the draft RFP for a strategic planning consultant. Legal counsel completed a redline review; changes were administrative in nature (required statutory provisions and updated dates), with no substantive revisions.

The Committee finalized the evaluation criteria and weighting to be presented to the Board. “Creativity” was combined with “customization to University Park needs,” and the scoring was set as follows: Creativity/Customization – 20%, Completeness – 20%, Past experience with industry-related strategic planning – 20%, Approach/Process – 15%, Communication plan – 15%, and Price – 10% (total 100%).

Mr. Kwame Jackson advised the Board is expected to consider approval on Friday. If approved, the RFP will be advertised in the local paper and distributed directly to known firms. Proposals are currently due January 16 (subject to change, potentially January 30 due to holidays). The Committee discussed the evaluation process upon receipt of proposals, including use of a scoring spreadsheet and scheduling an additional workshop meeting if needed to expedite review and recommendation timing.

THIRD ORDER OF BUSINESS

Review draft communication to UPCAI Board

The Committee reviewed a draft communication to the UPCA Board requesting inclusion as an agenda item at an upcoming UPCA Board meeting to discuss collaboration on the strategic planning process. Committee discussion focused on the importance of engaging UPCA and the broader community, while clarifying that the UPCA’s role would be to provide input rather than formal approval.

The Committee agreed to revise the final sentence of the communication to clearly state a desire for UPRD and UPCA to work together during the strategic planning process and in

engaging the community. After minor revisions and staff review, it was agreed that the Committee Chair, Mr. Freedman, would send the communication to the UPCA Board Chair, Mr. Tom Christopher, copying Committee members and PBM staff.

FOURTH ORDER OF BUSINESS

Review UPCA/UPRD/PBM organizational structure poster concept

The Committee discussed developing posters to help improve community understanding and address misinformation regarding the organizational structure of UPCA, UPRD, and PBM. PBM staff (Sydney Johnson and Dawne Waite) were asked to develop draft materials based on input from a joint meeting that included UPCA representation; the draft will be reviewed by both the Committee and UPCA, with final format (posters vs. flyers/emails) still under discussion.

The Committee considered adding QR codes linking to relevant website information and emphasized using multiple communication channels. The Committee also discussed developing a second communication focused on the benefits of the Recreation District (RD), including financial metrics (e.g., sales tax savings of approximately \$1.1 million over the last two years) and acknowledging associated district costs and Sunshine Law constraints. Members agreed messaging should be concise, bullet-pointed, and include key numbers; the Committee discussed rotating the two communications in January rather than releasing too much information at once.

FIFTH ORDER OF BUSINESS

Identify a list of topics for gaining support for future actions of the board to improve the club

The Committee discussed key topics to build community support for future Board actions, including developing a Strategic Plan, updating/implementing the Master Plan, and communicating the financial value of the RD beyond bond financing, including sales and property tax savings. Members requested that the Master Plan be circulated for reference and emphasized the need to align major capital projects (such as the kitchen and potential fitness/wellness improvements) with the Strategic Plan to avoid misaligned investments. General Manager John Fetsick noted the UPRD Board is expected to decide whether to

proceed with architectural work now or pause the process for 3–6 months pending the Strategic Plan.

As a related data point for future facility planning, the Committee discussed capacity constraints associated with high-demand club programming, using trivia as an example. Management noted that trivia events routinely reach capacity (approximately 200–210 attendees), while estimated member interest is significantly higher, indicating broader space limitations rather than a program-specific issue. The Committee acknowledged this demand as a relevant consideration for long-term facility planning and future capital decisions.

The Committee discussed member perceptions regarding access to popular programs. Management clarified that participation in trivia is administered through a lottery system and is not based on membership tier. The Committee noted the importance of clearly communicating this process to reduce misinformation. Potential operational alternatives to address capacity, such as utilizing café seating for overflow, were briefly discussed; management indicated the café is currently open during trivia for service, but weather and logistical constraints limit expansion options.

The Committee discussed how recent capital improvements completed over the past several years should be more effectively communicated to the community to provide context for future planning. Improvements referenced included enhancements to dining areas, pickleball facilities, the short game practice area, irrigation systems, racquets facilities (including replacement of fencing and lighting), and administrative office upgrades. Members emphasized that highlighting these completed projects would support transparency and understanding as the Strategic Plan and Master Plan discussions move forward.

SIXTH ORDER OF BUSINESS

Discuss other ideas to increase engagement of members and residents as we develop the strategic plan and update/implement the master plan.

The Committee discussed engagement strategies, including a potential “ambassador” approach using respected community members to help communicate the value of continued investment. Mr. Fetsick noted the strategic planning RFP should include a communication plan component and that the Committee can leverage best-practice

communication ideas received through the RFP process, even from firms not ultimately selected.

SEVENTH ORDER OF BUSINESS

Discuss idea of a charitable donation to a scholarship fund that fulfills the initiation fee for a Racquets membership.

The Committee discussed a concept received from UPRD Board member Steve Heitzner to allow prospective members to satisfy all or part of a Racquets initiation fee through a charitable contribution to a designated scholarship fund, rather than paying the initiation fee directly to the Club. It was noted this would be a forward-looking strategy to evaluate during the Strategic Plan process, as current-year initiation fee revenues are already budgeted. Members discussed potential structures (full waiver vs. credit/match), the need to identify/establish an appropriate charitable vehicle (e.g., scholarship foundation), and the financial tradeoffs given the proposed racquets initiation fees. The Committee agreed to gather additional information from comparable clubs for consideration and potential inclusion in the Strategic Plan.

The next upcoming meeting:

Date	Meeting Type	Time	Location	Note
January 14, 2026	Strategic Planning Committee Meeting	3:00 pm	Business Office	In person or by Zoom

Strategic Planning Committee Member Requests

Ms. Barbara Somma addressed the Committee to commend the significant improvements to the Club's appearance, noting that the landscaping at the Club, front entrance, and neighborhood entrances has never looked better. She stated that the grounds now appear more polished and sophisticated and emphasized that these visible enhancements add clear value and make a strong impression on residents and visitors. In response, General Manager John Fetsick credited these improvements in part to the addition of a dedicated landscape professional with a horticulture background, hired to focus specifically on club beautification and the areas surrounding the Club facilities.

The Committee discussed agenda items for the January meeting, including finalizing the draft publication to be presented to the Board, receiving an update on the Strategic Planning RFP (if issued), and continuing work on messaging related to the benefits of the RD. Mr. Swanson volunteered to draft a consolidated message outlining key positives and

considerations, incorporating input from committee members and financial information to be developed by staff. The Committee agreed to aim for circulation of a draft shortly after the new year for review at the January meeting.

Public Comments

During the public comment period, Mr. Dean Matt shared his view that bond financing increases homeowner debt and may affect property values and stated his opinion that the District has not adequately analyzed debt capacity or long-term financial impacts. He expressed concern that capital and architectural planning is proceeding without a comprehensive five-year plan in place, and commented on the need, in his view, for clearer communication of both the advantages and disadvantages of bond financing, as well as improved governance and sequencing of planning decisions.

Adjournment

The meeting was adjourned at approximately 4:45 pm.

Chair's Report: Visit to Heron's Glen
Brief update and key takeaways from the Chair's visit.

From: [Jim Freedman](#)
To: [Jennifer Brown](#)
Subject: Fwd: Re: Heron's Glen
Date: Monday, January 5, 2026 6:43:00 PM

----- Original Message -----

From: John Fetsick <jfetsick@universitypark-fl.com>
To: Jim Freedman <Jim.Freedman@universityparkrd.com>
Date: 12/19/2025 12:12 PM EST
Subject: Re: Heron's Glen

Hi Jim,

I've been there before also. I went with Steve Ludermer a few years back.

Heron's Glen doesn't hold a candle to us but is referenced by some as "doing everything right". They probably should be looking up to us, vs. vice versa.

Thanks for the reply and update on your visit.

John

Sent from my iPhone

On Dec 19, 2025, at 11:58 AM, Jim Freedman
<Jim.Freedman@universityparkrd.com> wrote:

John,

It was interesting

I think that Rusty sees things differently than I do

Heron's Glenn has 1,300 homes and only 19 holes

Much older community in terms of the age of the residents

They have two levels of membership

Everyone that lives there is a member that can use everything but the golf course

They have an additional charge to use the golf course that includes use of club golf cart.

The facilities and golf course do not hold a candle to what we have with a couple of exceptions:

- They have a huge ballroom that has a stage and can be used for community performances, lectures, town halls etc

- They have a central pool - but it is pretty tired not at all like the ones that most new communities have
- They have a few dining rooms that can be used for private

- parties for the residents
- Their gym is larger than ours but does not have any classrooms - but has massage rooms and personal training rooms
 - There were a couple of things that may be interesting to us
 - They only use the district management resources for the yearly audit, the folks in Orlando do not schedule meetings, sit in on meetings or have anything to do with running the district other than the audits! Their cost is about \$80k/year
 - The HOA owns no property at all so they do not pay any property taxes because it is all considered municipal property!
 - They also have about 30% of their population that are against investing any anything!
 - They refinanced their bond when the rates were down and were able to get 13 million in finding for only an additional \$150/yr per household. A great deal that some fought! They pay about \$1,500/house per year total bond tax
 - They pay about \$2,500 member fee and an additional \$2,500 golf fee per year!
 - But their homes and facilities are very tired compared to ours

On 12/16/2025 10:40 AM EST John Fetsick
<jfetsick@universitypark-fl.com> wrote:

Jim,

How was your visit to Heron's Glen with Rusty? is very similar to our community

Any insights worth sharing?

Thanks,

John

JOHN FETSICK



General Manager

Park Boulevard Management, LLC

Serving: University Park Country Club & UPCA
7671 The Park Blvd, University Park, FL 34201

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☐ www.universitypark-fl.com

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Consideration of an Online Resident Feedback System

Online Grievance & Suggestion System

For a 1,500-Member Country Club (Social, Racquets, Full Golf)

1. Executive Summary (Board & GM Ready)

This system provides a **structured, discreet, and accountable way** for members to submit suggestions, concerns, grievances, and compliments. It improves member satisfaction, reduces informal complaints, and gives leadership **clear visibility into trends** without reputational risk.

Key Benefits

- Faster issue resolution
 - Improved member trust
 - Clear departmental accountability
 - Data-driven management decisions
 - Reduced board-level escalation
-

2. Objectives & Design Principles

Objectives

- Simple, fast member submission (< 2 minutes)
- Automatic routing to correct department
- Clear service level expectations
- Discreet handling of sensitive issues
- Actionable insights for leadership

Design Principles

- Private, not public
 - Mobile-first
 - Human tone, not corporate
 - Transparency without oversharing
-

3. Member Experience (Front End)

Access Points

- Member portal (desktop & mobile)
- QR codes placed in:
 - Locker rooms
 - Dining areas
 - Pro shops
 - Racquets center
- Optional concierge tablet

Submission Categories

Members select one:

- 💡 Suggestion
- ⚠️ Concern
- 🚨 Grievance / Complaint
- 👍 Compliment

Form Fields

- Name (auto-filled if logged in)
- Membership type (Social / Racquets / Full Golf)
- Area involved (multi-select):
 - Golf
 - Racquets
 - Dining
 - Fitness
 - Events
 - Locker Rooms
 - Pro Shop
 - Facilities
 - Administration
- Description (guided prompt)
- Urgency level: Low / Medium / High
- Preferred follow-up: None / Email / Phone
- Anonymous option (flagged internally)

4. Sample Member Submission Screen (Text Wireframe)

Title: We Value Your Feedback

What would you like to share today?

☐ Suggestion ☐ Concern ☐ Grievance ☐ Compliment

Area(s) involved:

☒ Dining ☐ Golf ☐ Racquets ☐ Facilities

Please describe your feedback:

"Tell us what happened or what you'd like to see improved..."

Urgency:

☐ Low ☐ Medium ☐ High

Follow-up preference:

☐ No response needed

☐ Email me

☐ Call me

[Submit Feedback]

5. Internal Workflow & Routing**Automatic Assignment Rules**

- Golf issues → Head Golf Professional
- Racquets → Director of Racquets
- Dining → F&B Director
- Facilities / Locker Rooms → Facilities Manager
- Administrative → GM / Assistant GM

Status Lifecycle

1. Received
2. Assigned
3. In Progress

4. Resolved

5. Closed

Members see status updates only if follow-up was requested.

6. Service Level Agreements (SLAs)

Type	Acknowledgment	Target Resolution
Suggestion	48 hours	14–30 days
Concern	24 hours	7–14 days
Grievance	Same day	3–7 days
High Urgency	Immediate alert	24–48 hours

Automated reminders trigger at 75% of SLA.

7. Escalation Rules

- Missed SLA → GM notified
- Multiple issues in same area (30 days) → Auto-flag
- Repeat grievance from same member → Discreet review
- High urgency + sentiment negative → Immediate alert

8. Leadership Dashboard

GM / Department Head View

- Open vs closed items
- Average resolution time
- Volume by department

- Repeat issues
- Sentiment trend

Board-Safe Monthly Report

- Total submissions by category
- Top 5 recurring themes
- % resolved within SLA
- Improvements implemented
- No member or staff names

9. Cultural Safeguards (Critical)

- No public comments or threads
- Anonymous submissions allowed
- Response tone guidelines
- Standard templates with personalization

Sample Response Template:

"Thank you for bringing this to our attention. We appreciate the opportunity to improve and are addressing this with our team."

10. Technology Stack Options

Option A: Low-Cost / Fast Deployment

- Microsoft Forms
- Power Automate
- SharePoint or Dataverse

- Outlook / Teams notifications

Option B: Club Software Integration

- Clubessential
- Jonas
- Northstar

Option C: Enhanced Support Platform

- Zendesk or Freshdesk
- Custom branding
- SLA tracking
- Knowledge base

11. Agentic AI Enhancement (Optional but Powerful)

AI Capabilities

- Auto-categorization
- Sentiment analysis
- Urgency detection
- Duplicate issue detection
- Draft response suggestions

Proactive Intelligence

- Pattern recognition (e.g., dining wait times)
- Early warning alerts
- Predictive staffing or scheduling signals

Example AI Insight

“Locker room cleanliness complaints increased 35% on weekends between 11am–2pm.
Recommend staffing adjustment.”

12. Success Metrics (KPIs)

- % acknowledged within SLA
- Average resolution time
- Repeat complaint rate
- Member satisfaction follow-up score
- Reduction in informal complaints

13. Implementation Timeline

Week	Activity
1	Final requirements & branding
2	Build forms & workflows
3	Internal testing & staff training
4	Soft launch
6	Board reporting & optimization

14. Positioning Statement (Optional)

“Your Voice. Our Commitment.”

This system reinforces the club’s commitment to excellence, responsiveness, and respectful dialogue.

15. Next Steps

- Approve system scope

- Select technology option
- Assign internal owners
- Prepare member communication