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The special committee meeting of the **Strategic Planning Committee of the University Park Recreation District** will be held on **Thursday, March 5th at 11:00 am** at the Business Offices located at 8301 The Park Boulevard, University Park, FL 34201 and or virtually.

Meeting ID: 869 9892 0698 **Passcode:** 296361

Join meeting via Zoom:

<https://us02web.zoom.us/j/86998920698?pwd=eSCA24VUVaR4OabV4sJ1VEwCSiQcNF.1>

One tap mobile

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+13126266799,,86998920698#,,,,*296361# US (Chicago)

Join instructions

https://us02web.zoom.us/meetings/86998920698/invitations?signature=SznOw62LZJaFzDxD8OKFPj_P1sJomW-pETWbq7SplMI

Strategic Planning Committee Meeting Agenda

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

- Consideration of Minutes of the:
 - January 14, 2026, Strategic Planning Committee Meeting Minutes
 - February 11, 2026, Strategic Planning Committee Meeting Minutes

District Matters

- Review and Acceptance of Steve Swanson’s Resignation from the Strategic Planning Committee

Business Matters

1. Evaluation of Club Benchmarking Data in Relation to Potential Use of Outside Consultants

- *Presenter: Jim Freedman*
 - Discuss feedback gathered from the Joint Committee Workshop
 - Overview of Club Benchmarking Data
 - Discuss how data may support strategic planning efforts and how it relates to need for outside consultants

2. Review of Strategic Planning Consultant RFP Submissions

- *Presenter: John Fetsick*
 - Update on bids received following open-bid deadline
 - Review submission(s) & discuss proposals
 - Committee input, ranking, and recommendation

3. Update on member feedback portal (Club Insights) and implementation timeline

- *Presenter: John Fetsick & Barbara Somma*
 - Proposal of *MemberConnect* software
 - Discuss pricing, function, timeline, and scope
 - Committee Discussion and Recommendation

Next Meeting Scheduled

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

Strategic Planning Committee Member Requests & Public Comments

Adjournment

Consideration of the Minutes

January 14, 2024 Strategic Planning Committee Meeting Minutes

February 11, 2026, Strategic Planning Committee Meeting Minutes

MINUTES OF MEETING

UNIVERSITY PARK RECREATION DISTRICT STRATEGIC PLANNING COMMITTEE
MEETING

WEDNESDAY, JANUARY 14, 2026

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
Sydney Johnson	Communications Director – 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

There were no public comments.

SECOND ORDER OF BUSINESS

Approval of Minutes

The minutes from the meetings held on October 20, November 6, November 12, and December 10 were reviewed. No amendments were proposed, and the minutes were approved unanimously following a motion by Jim Freedman and a second by Steve Swanson.

THIRD ORDER OF BUSINESS

RFP Update

John Fetsick updated the committee that the RFP was approved by the UPRD board and advertised. The deadline was extended to February 20, 2026 to allow more time for distribution to relevant firms.

FOURTH ORDER OF BUSINESS

Collaboration with UPCA

Jim Freedman provided an update on efforts to improve collaboration between the UPRD board and the UPCA board, regarding strategic planning and community engagement.

Suggestions from the committee included the following:

1. Inviting a representative from the UPCA board to participate in UPRD strategic planning meetings.
2. Regular Updates at HOA Chair Council Meetings
3. Engaging Neighborhood Chairs as Ambassadors
4. Joint Communications: Sydney Johnson, Communications Director, suggested utilizing existing communication platforms, such as the club's monthly newsletter and HOA updates, to share information about collaborative efforts and strategic planning initiatives.

Next Steps:

- Jim Freedman will continue discussions with UPCA President, Tom Christopher and other HOA board members to encourage participation in RD strategic planning meetings.
- The committee will explore opportunities to provide updates at HOA chair council meetings and engage neighborhood chairs in RD initiatives.
- Sydney Johnson and Dawne Waite will work on creating joint communication materials that clearly define the roles and benefits of the RD, HOA, and PBM entities.

FIFTH ORDER OF BUSINESS

Communication Strategies

Ronni Loundy provided an update on the development of communication materials following her meeting with the UPCA Communications & PR Committee and PBM staff, including Sydney Johnson and Dawne Waite. PBM staff proposed creating a pamphlet or tri-fold flyer to clearly explain the roles and benefits of the UPRD, UPCA and PBM, with

concise and easy-to-understand definitions of each entity and their respective responsibilities. While the committee initially discussed the use of posters in high-traffic areas such as the dining room, fitness center, and other community spaces, the tri-fold format was presented as a more effective and portable option that could also be distributed digitally through monthly and other club email communications.

In addition, Sydney Johnson created a professionally produced video explaining the roles of the UPRD, UPCA, and PBM, intended to educate prospective buyers and community members on the structure and benefits of the three entities. The UPCA board expressed concerns that the video was overly focused on PBM and did not align with their preferences. The committee discussed the possibility of re-editing the video to provide a more balanced presentation with greater emphasis on UPCA and suggested using the revised video as a marketing and educational tool for new residents and prospective members during the onboarding process, including when new residents complete membership paperwork.

SIXTH ORDER OF BUSINESS

RD Financial Benefits

Ken Schreder presented a detailed analysis of the financial benefits associated with the RD (Recreational District) structure, emphasizing the significant cost savings it provides to the community. The discussion highlighted three primary areas of savings:

1. Property Tax Savings

- The RD structure exempts the community from paying property taxes on RD-owned properties.
- The last recorded property tax payment was in 2017, amounting to \$312,000. However, this figure is likely understated as property taxes have increased since then.
- The committee noted that this exemption represents a substantial financial benefit for the community, as property taxes would otherwise be a recurring annual expense.

2. Sales Tax Savings

- In the last fiscal year, the RD made \$4.469 million in purchases, resulting in a 7% sales tax savings of \$312,000.
- Ken Schreder highlighted that this figure might also be understated, as it does not account for large-scale purchases such as the \$1.2 million irrigation system. Including such significant expenditures would further increase the savings.

3. Bond Interest Savings

- The RD structure allows for lower interest rates on bonds compared to traditional financing methods.

- Over the term of the bond, the community saves approximately \$655,000 annually, totaling over \$1 million in savings.

Annual RD Costs vs. Savings

- The annual cost of maintaining the RD was approximately \$300,000 last year.
- When compared to the total annual savings of \$750,000, the RD structure provides a net financial benefit of \$450,000 annually.
- On average, this equates to a savings of \$627 per household per year.

Committee Discussion

- Suggestions were made to create a comprehensive report that includes historical data on property tax savings since the RD was established in 2017. This report would provide a clearer picture of the cumulative savings over the years.

It was noted that the RD's ability to purchase materials directly (e.g., for the irrigation system and café renovations) further amplifies the sales tax savings.

- The committee discussed the need to highlight these financial benefits in future communications to ensure residents understand the value of the RD structure.

Action Items

- Ken Schreder will work with Paul Fay to compile a detailed report on RD savings since 2017, including annual property tax savings, sales tax savings, and bond interest savings.
- The report will be shared with the committee and included in future communications to the community.

The committee agreed that the RD financial benefits are a key selling point for the community and should be emphasized in educational materials to increase awareness and support for the RD structure.

SEVENTH ORDER OF BUSINESS

Visit to Heron's Glen

Jim Freedman shared insights from a visit to Heron's Glen, another RD community. Key observations included:

1. Management Structure:

- Heron's Glen does not use an outside management company. Instead, they have one organization that provides all staff and services for both the Homeowners Association (HOA) and the Country Club.
 - Residents interact with a single office for all issues, whether related to the HOA or the Country Club, simplifying processes for the community.
2. **Property Ownership:**
 - The RD at Heron's Glen owns all the real estate, including common areas and facilities, while the HOA owns no real estate. This structure helps them save on real estate taxes.
 3. **District Management:**
 - Heron's Glen uses the same district management company (PFM) as UPCA but only for audits. They pay \$80,000 annually for these services, which is less than UPCA's \$70,000 for more comprehensive services, including meeting attendance.
 4. **Membership Structure:**
 - Heron's Glen has two levels of membership. All members can use facilities like the gym, tennis courts, dining areas, and card rooms, but golf is a separate fee.
 - Golf membership costs approximately \$2,500 annually, which includes a golf cart and no green fees.
 5. **Facilities:**
 - Heron's Glen has a large, modern gym with extensive equipment but lacks classrooms for group activities.
 - Their clubhouse is well-designed, featuring a library, card rooms, dining areas, a large ballroom with a stage, and a central pool. However, some facilities appeared dated and not recently upgraded.
 6. **Cost-Saving Measures:**
 - Heron's Glen has a strong focus on keeping costs low, which is reflected in their facilities and membership fees.
 - They refinanced their original bond to secure an additional \$7 million for improvements, which increased costs by \$100 per home, causing some dissatisfaction among residents.
 7. **Demographics and Community Feel:**
 - The community has an older population, with homes being smaller and more modest compared to UPCA. The average home price is around \$400,000.
 - The community has a different feel, with less emphasis on events and engagement compared to UPCA.
 8. **Sunshine Laws:**
 - Heron's Glen does not strictly follow sunshine laws, which has been a point of discussion at UPCA regarding the level of protection desired.
 9. **General Observations:**
 - The visit highlighted that while Heron's Glen has some practices worth considering, it operates at a different level and has a different focus compared

to UPCA. It was noted that Heron's Glen is not as focused on ensuring a strong future or competing with nearby communities like Lakewood Ranch.

EIGHTH ORDER OF BUSINESS

Membership Demographics and Strategy

The committee discussed the need to analyze current membership demographics to address concerns about aging members and declining full membership levels. Suggestions included:

- Creating a senior membership category for less active members.
- Gathering data on membership turnover, age demographics, and activity levels.
- Exploring reasons why new residents may not opt for full membership.

The committee agreed to gather data and explore strategies to adapt to changing demographics.

NINTH ORDER OF BUSINESS

Online Feedback System

Jim Freedman proposed implementing an online system for grievances, suggestions, and feedback. John Fetsick shared details about a potential software solution that could include features like geofencing and push notifications to gather feedback from members. The committee agreed to explore this further, with John Fetsick presenting a proposal at the next meeting.

The next upcoming meeting:

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 Requests

Action Item: Committee members were asked to submit recommendations for data needed to support data-driven Board decisions on membership categories, including analysis of aging membership and demographic trends. Suggestions should be sent to Jennifer Brown, who will compile and share them with the group to avoid duplication.

Adjournment

The meeting was adjourned at approximately 4:26 pm.

MINUTES OF MEETING

UNIVERSITY.PARK.RECREATION.DISTRICT.
STRATEGIC PLANNING COMMITTEE MEETING
Wednesday, February 11, 2026
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	Member
Steve Swanson	Member

Also, present in person or via Zoom:

Sally Dickson	Chairperson – University Park Recreation District
John Fetsick	General Manager – University Park Country Club
Sydney Johnson	Communications Director – University Park Country Club
Kwame Jackson	Assistant District Manager - PFM

Various audience members

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call, Pledge of Allegiance

The meeting was called to order at approximately 3:00 pm by Ronni Loundy. Those in attendance are outlined above with all committee members present in person. A quorum was confirmed.

Public Comments

No public comments were made.

SECOND ORDER OF BUSINESS

Business Matters

CONSULTANT RFP UPDATE

John Fetsick provided a status update following approval and advertisement of the Strategic Planning Consultant RFP.

He reported that three major consulting firms intend to submit proposals: McMahon Group, GGA Partners (partnering with Peacock and Lewis), and Strategic Club Solutions. McMahon Group, which previously presented to the committee, is expected to resubmit under the revised RFP terms.

RFP submissions will close on February 20, 2026, with a public opening scheduled for 12:15 pm that same day. The anticipated award date is March 13, 2026.

The committee agreed to hold a workshop during the week of March 2 to review proposals prior to making a recommendation to the Board.

John Fetsick will distribute all proposals electronically following the public opening.

THIRD ORDER OF BUSINESS

COLLABORATION WITH UPCA

John Fetsick and Jim Freedman provided an update regarding discussions with Tom Christopher, President of UPCA. Mr. Christopher expressed interest in having the UPCA Board and Chair Council participate in the strategic planning process.

The committee discussed the value of meaningful participation and collaborative engagement throughout the process. It was noted that the Chair Council may assist in encouraging resident participation in upcoming surveys and engagement initiatives.

Barbara Somma suggested clarifying participation roles and expectations to ensure alignment and a productive working relationship among the entities.

The committee expressed support for coordinated involvement of UPCA and the Chair Council in the strategic planning process.

FOURTH ORDER OF BUSINESS

JOINT COMMUNICATIONS
PROJECT UPDATE: UPRD, UPCA,
& PBM

Ronni Loundy provided an update on the development of joint communication materials intended to clarify the roles, responsibilities, and benefits of UPRD, UPCA, and PBM.

It was noted that communications efforts remain temporarily paused pending finalization and legal review of the Mutual Cooperation Agreement. The committee discussed whether inclusion of the Mutual Cooperation Agreement in joint materials was necessary or whether it could create confusion or additional questions if circulated prematurely. The committee agreed that communications initiatives will resume following the UPRD Board election.

Sydney Johnson, Communications Director, and Dawne Waite, Graphics Administrator, recommended utilizing flyers or brochures rather than posters for community outreach to improve portability and distribution flexibility.

The committee discussed developing informational materials outlining the financial and structural benefits of the district and proposed scheduling a workshop to refine RD benefit materials and determine presentation form.

Action Items:

Committee members will submit RD benefit materials to Sydney Johnson for compilation in advance of the workshop.

FIFTH ORDER OF BUSINESS

MEMBERSHIP DEMOGRAPHICS & STRATEGY

Jim Freedman led a discussion regarding membership demographics and long-term strategy.

The Committee Input Summary included in the meeting packet was referenced during discussion to support the conceptual review of membership categories and long-term demographic trends.

Recent analysis conducted through the Finance Committee, including review by Paul Fay, indicates that approximately 35% of full golf members are over the age of 75. The committee discussed long-term revenue considerations and emphasized the importance of validating assumptions with data.

The committee agreed that demographic and usage analysis should continue through the Finance Committee and that findings should be incorporated into the broader strategic planning framework.

SIXTH ORDER OF BUSINESS

ONLINE FEEDBACK SYSTEM

John Fetsick provided an overview of a proposed survey software solution from Club Insights to collect event feedback and ongoing member sentiment.

The committee discussed integrating a member feedback portal into the club's website and mobile application.

Action.Items¿

John Fetsick and Barbara Somma will meet with Club Insights on February 16, 2026, at 11:00 am. The goal is to launch a member feedback portal on the website and app by the March meeting.

SEVENTH ORDER OF BUSINESS

LOW-COST AMENITIES FOR SOCIAL MEMBERS

Jim Freedman presented discussion concepts related to potential low-cost amenities appealing to social members, including bocce ball, cornhole, and horseshoes.

Bocce courts were discussed as a potential option, with consideration given to possible placement near Courts 10 and 11.

The committee agreed to explore feasibility and emphasized that any new amenity should include organized member-run programming to support sustained engagement.

EIGHTH ORDER OF BUSINESS

CONCEPT OF ANNUAL COMMUNITY TOWN HALL MEETING

Ronni Loundy and Greg Selep led discussion regarding reinstating an annual community town hall meeting to improve transparency and communication among UPRD, UPCA, and PBM.

The committee discussed logistical considerations, including venue capacity and cross-entity coordination. Alternate venue options may be explored if necessary.

The committee unanimously supported reinstating an annual community town hall meeting.

Action.Items¿

Greg Selep volunteered to coordinate logistics and develop a proposed agenda and format for the first town hall meeting.

Next Meeting Scheduled

Date	Meeting Type	Time	Location	Note
March 11, 2026	Strategic Planning Committee Meeting	3:00 PM	Business Offices	In person or by Zoom

Strategic Planning Committee Member Requests & Public Comments

Committee members were asked to review the RFP submissions once distributed following the February 20, 2026 public opening and to provide input in advance of the March workshop (pending scheduling).

A committee member noted that further discussion of the Senior Membership concept remains pending. It was also stated that the committee is awaiting additional data and that the Finance Committee continues to evaluate the financial framework associated with the concept. No formal proposal has been introduced at this time.

There were no public comments.

Adjournment

The meeting was adjourned at approximately 4:32 pm.

**Steve Swanson's Formal Resignation
from the Strategic Planning Committee**

Resignation from Strategic Planning Committee

From Steve Swanson <steve@[REDACTED]>

Date Sun 2/22/2026 11:35 AM

To Vivian Carvalho <carvalhov@pfm.com>

Cc Kristin Lasky <laskyk@pfm.com>; Kwame Jackson <jacksonk@pfm.com>; Sydney Johnson <sjohnson@universitypark-fl.com>

Vivian, et al:

Please consider this my formal resignation from the Strategic Planning Committee as a result of my newly elected position on the RD board as a supervisor.

I appreciate your support on the old role and will also need it in my new one.

Thank you!

Steve

Steve Swanson
[REDACTED]

[REDACTED]

[REDACTED]

2.

Review of Strategic Planning Consultant

RFP Submissions

- a. Strategic Club Solutions
- b. McMahon Group
- c. GGA Partners

ORIGINAL



Request For Proposal

Prepared For:

University Park Recreation District
John Fetsick, General Manager
7671 The Park Boulevard
University Park, FL 34201

Prepared By:

Fokus Forward LLC
dba Strategic Club Solutions
10556 N Port Washington Road
Suite 202
Mequon, WI 53092
P: 262-661-2582

A handwritten signature in black ink, appearing to read 'Ryan Doerr'.

Ryan Doerr, President



STRATEGIC CLUB SOLUTIONS



University Park Country Club

Request For Proposal

February 2026

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1. Assess current state | Review University Park background material

Strategic Club Solutions (SCS) will assess the current state of University Park through a structured review and analysis of existing materials. This process is designed to establish a clear baseline of Resident/Member needs, amenity utilization, governance practices, financial capacity, market benchmarks, and operational realities to inform strategic planning and decision-making.

a. Review of University Park Background Materials

SCS will collect, review, and analyze relevant documentation throughout the assessment and discovery phases. Each document category is reviewed independently and then evaluated collectively to identify themes, gaps, constraints, and opportunities. Existing materials informing Resident/Member amenity preferences include, but are not limited to:

i. Membership – Past and Present

- Review historical and current membership data to assess participation trends, usage patterns, and demographic shifts
- Identify changes in demand, engagement, and amenity utilization over time
- Consider industry trends for communities and clubs nationally and in the Greater Sarasota area

ii. Past Surveys, Questionnaires, and Studies

- Analyze prior Resident/Member feedback to identify recurring themes, satisfaction drivers, unmet needs, and areas of concern
- Compare historical sentiment to current conditions to understand trend progression and unresolved issues
- Refer to this information to drive thoughtful questions in the planning process and data collection phase

iii. Capital Project Documentation

- Review past and planned capital projects to understand investment history, scope, outcomes, and alignment with Resident/Member expectations
- Evaluate how capital decisions have supported (or constrained) amenity experience and long-term planning
- Review past and current capital reserve studies, as well as fixed asset listings and depreciation schedules, for best practices and opportunities for improvement

iv. Financial Records

- Review historical financial statements and current budgets to understand operating performance, funding sources, and financial capacity
- Assess the financial implications of existing amenities and future strategic options

- Identify industry benchmarks and best practices, as well as opportunities for improvement
- Review balance sheet assets and liabilities for optimization and working capital considerations

v. Governance Documents

- Review all governing documents, policies, and governance structures to understand the roles, responsibilities, requirements, and restrictions interrelated between the University Park Recreational District, University Park Country Club, University Park Community Association, and Park Boulevard Management.
- Identify governance considerations that may impact strategic recommendations and implementation
- Focus on opportunities for further optimization and organizational success

vi. Operations Information

- Review operational practices, staffing structures, service models, and policies to assess efficiency and effectiveness
- Look at the overall value proposition, pricing strategies, programming, and Resident/Member experience.
- Identify operational strengths and constraints influencing the Resident/Member experience

vii. Facility Information

- Review facility inventories, asset lists, and condition information to understand the current amenity portfolio
- Identify potential gaps in current facilities and opportunities for expanded or enhanced offerings
- Assess how existing facilities align with Resident/Member preferences, utilization trends, and future needs
- Conduct a campus/property overview, looking at opportunities for future amenity activation and/or expansion
- Conduct a thorough tour of facilities and amenities and analyze their current and potential future use, based on usage patterns, trends, and the changing needs of the membership

Due Diligence and Application

Findings from the existing materials review will be analyzed alongside insights from onsite engagement, interviews, leadership, stakeholder input, and Resident/Member input. This integrated analysis allows SCS to develop a fact-based understanding of the current state and ensures strategic recommendations are realistic, financially informed, and aligned with resident expectations.

2. Competitive Analysis - Benchmark data research and analysis

To further inform the current state assessment, Strategic Club Solutions (SCS) will conduct a targeted competitive analysis to understand how University Park's amenities, programs, and value proposition compare with those of relevant peer communities and clubs. This analysis is designed to identify market expectations, differentiation opportunities, and strategic gaps that may influence Resident/Member satisfaction, investment priorities, and long-term positioning.

a. Identify HOAs that have country clubs

SCS will work with University Park leadership, drawing on our industry knowledge and our work with clubs and communities in Florida. To identify an appropriate competitive and aspirational peer set.

- i. In the immediate Sarasota area, that cater to the same demographic
- ii. Within Florida and the Southeast
- iii. Both thriving and those that are declining

As suggested in the RFP, this includes comparable communities with country clubs, as well as considering geography, scale, amenity mix, governance model, value proposition, and resident demographics. We know that University Park is only one of two Recreation Districts in the State of Florida, so we will need to look beyond that criterion for other comparable metrics.

b. What types of amenities or services are essential to membership retention and growth

Competitive Data Collection & Review

SCS will gather and review publicly available and client-provided information for each identified peer club/community, including:

- Amenity offerings and facility mix
- Programming, lifestyle, and service models
- Membership or resident access structures (where applicable)
- Capital investments and recent enhancements
- Governance and operating models
- Operational and experiential distinctions (where applicable)
- Fee structures and value positioning (as available)

Comparative Analysis

Each peer club/community will be evaluated against University Park using a consistent framework to assess:

- Scale and quality of amenity offerings in relation to value
- Alignment between facilities, programs, and Resident/Member expectations
- Level of investment and reinvestment in amenities

- Operational complexity and service delivery approach
- Distinguishing features and points of differentiation

This comparison allows SCS to identify where University Park is competitive, where it may be under- or over-invested, and where strategic opportunities exist to enhance relevance and perceived value.

Stakeholder Insights and Qualitative and Quantitative Actionable Data

At SCS, we believe it is critical for the success of any Strategic Plan that all stakeholders are engaged. Our stakeholder engagement approach gives every Resident/Member an opportunity to have a voice and be heard. Our process to achieve this is as follows:

- 1) Onsite Visit & Stakeholder Interviews
- 2) 5-7 Virtual or In-person (60-minute) Resident/Member Focus Groups
- 3) Custom Tailored Resident/Member Survey
- 4) Employee Survey

This generates actionable insights from raw data by cross-segmenting demographics and user profiles, measuring importance and satisfaction, identifying gaps and opportunities, and uncovering insights into aspirational and obligatory projects. We compile these findings into a Survey Summary for leadership and an Executive Summary for distribution to the Resident/Members. This data provides leadership with actionable insights to make informed, well-supported decisions when developing the Strategic Plan. This will also be critical data we share in the communication plan through various plan milestones.

Compile and Summarize Data and Discovery for Education

We will combine the discovery above with the data collected to educate and inform stakeholders in preparation for the planning retreat and plan development.

This concludes our due diligence and discovery phase of the process.

3. SWOT Analysis based upon the information that has been gathered and comparison to other HOAs/Clubs

Strategic Club Solutions (SCS) brings the Board and management team together in a structured, data-informed setting to translate discovery findings and competitive insights into a clear strategic direction. This phase integrates benchmark research, stakeholder input, and facilitated discussion to ensure recommendations are grounded in market realities and organizational capacity.

Strategic Planning Retreat Preparation

Findings from discovery and competitive benchmarking will be compiled and analyzed in advance of the retreat and used to inform structured pre-work.

This includes:

- Development and distribution of a pre-retreat workbook
- Curated summaries of key findings from:
 - Document review and financial analysis
 - Resident/Member surveys and focus groups
 - Competitive benchmarking and market insights

Board & Leadership Input (SWOT Framework)

Board and senior leadership will be asked to provide individual input in advance of the retreat, informed by the compiled data, including:

- Strengths, weaknesses, opportunities, and threats (SWOT)
- Mission, Vision, and Values considerations
- Aspirational identity and future positioning
- Brand Clarity

4. Communications Plan

Strategic Club Solutions (SCS) approaches communication as a structured, integrated, and engaged process designed to ensure Resident/Member input is thoughtfully collected, accurately interpreted, and clearly communicated throughout the strategic planning engagement.

Communication is coordinated in partnership with University Park leadership to maintain transparency, consistency, and appropriate messaging.

Eliciting Information from Residents/Members

SCS employs multiple, intentionally sequenced methods to gather Resident/Member input, ensuring broad participation and depth of insight.

Discovery & Engagement

- **Resident/Member Focus Groups**

SCS manages all communication, coordination, and facilitation for Resident/Member focus groups, working with a designated community liaison to ensure appropriate representation and efficient scheduling.

- Clear purpose and participation expectations are communicated in advance
- Sessions are facilitated by SCS to encourage open, candid discussion
- Input is documented, synthesized, and used to inform survey design and strategic priorities

Survey Development & Administration

- **Resident/Member Survey Distribution**

SCS develops and administers a custom electronic Resident/Member survey designed to gather unbiased, decision-focused feedback.

- A clear survey communication plan outlines the purpose, timing, and how results will be used
 - Surveys are distributed electronically over a defined 14–18-day window
- SCS serves as the point of contact for resident questions and technical support

- **Employee Engagement Survey** (where applicable)

Parallel survey communication ensures staff perspectives are gathered confidentially and responsibly to inform operational and workforce considerations

These methods allow SCS to capture both qualitative insight and quantitative data, ensuring resident voices are heard across multiple engagement formats.

Disseminating Information to Resident/Member

SCS supports leadership in communicating progress, findings, and outcomes clearly and appropriately throughout the engagement.

Survey and Engagement Feedback

- Survey and focus group findings are analyzed, organized, and translated into clear themes and insights
- A Resident/Member-ready survey executive summary is prepared for distribution, highlighting key takeaways and reinforcing how Resident/Member input informed strategic direction

Strategic Plan Communication

- Following Board approval, SCS develops a Resident/Member-facing professionally designed Strategic Plan brochure that communicates:
 - The planning process
 - Key priorities and strategic objectives
 - How Resident/Member input influenced the final plan
- Messaging is written in clear, accessible language and aligned with leadership's communication cadence and channels

Ongoing Alignment and Plan Progress

- Throughout the engagement, SCS works with University Park leadership to ensure messaging remains consistent, timely, and aligned with governance protocols
- Communication tools and materials are designed to support transparency, reinforce trust, and set clear expectations for implementation and next steps
- We recommend at least a twice-a-year plan communication cadence to keep the Resident/Member informed about the board and management's progress with the plan implementation

Capital Project Strategy and Communications (optional)

- When capital projects are part of the developed plan, SCS has a dedicated in-house communications and graphic design team to work with clients for a strategic communications program to help ensure widespread adoption and support through our award-winning approach.

Communication Philosophy

SCS's communication approach emphasizes clarity, credibility, and follow-through. By clearly explaining why input is being gathered, how it will be used, and what outcomes result, SCS helps leadership build confidence in the process and foster meaningful Resident/Member engagement.

5. Recommendations for Areas of Improvement and Investment

Strategic Plan Development

Facilitated Strategic Planning Retreat

During the retreat, SCS will facilitate a structured discussion to:

- Validate and refine the SWOT using benchmark and Resident/Member data
- Clarify current and aspirational brand identity
- Explore tradeoffs between aspiration, financial capacity, and operational reality
- Align the Board and management team around strategic priorities informed by market position and resident expectations

The retreat serves as the point where data, benchmarking, and stakeholder input are integrated into a clear, shared strategic framework.

Strategic Club Solutions (SCS) develops recommendations for improvement and investment through a structured, data-driven process that integrates Resident/Member input, financial analysis, competitive benchmarking, and Board alignment.

Recommendations are informed by findings from document review, Resident/Member and employee surveys, focus groups, leadership interviews, competitive analysis, and facility and operational assessments. These inputs are summarized to identify opportunities that are both impactful and realistic.

SCS applies a disciplined evaluation framework to prioritize recommendations based on:

- Alignment with the community's Mission, Vision, Values, and aspirational identity
- Impact on Resident/Member satisfaction, engagement, retention, and growth
- Financial capacity, funding considerations, and long-term operating impact
- Operational feasibility, staffing implications, and risk

During the facilitated Board Strategic Planning Retreat, SCS works with leadership to validate opportunities, evaluate tradeoffs, and establish clear priorities for improvement and investment.

Final Strategic Plan Deliverables:

- Discovery Summary and Opportunity Assessment Report
- Resident/Member Survey Summary and Raw Data Responses
- Member-facing communication with Executive Survey Summary, Mission, Vision, Values, and any other defined statements about current and aspirational identity.
- High-level Critical Success Factors and Key Objectives for the Plan
Detailed working Strategic Plan Narrative to include initiatives and action steps
- 12-18-month action plan in a working accountability document in Excel, Navigator, or other board portal solution to manage strategic planning progress.

Final recommendations are documented in the Strategic Plan and presented in a prioritized, phased format, with high-level implementation considerations, to ensure decisions are actionable, financially informed, and aligned with long-term sustainability.

You can find examples of some of these deliverables in tab eight of this proposal.

6. Consulting Project Pricing and Timeframe

We will work collaboratively with Club leadership to identify a timeline that meets the Club's needs. Most strategic planning engagements are completed within 4-6 months, depending on availability and scope. The following outlines the workflow of our TruVision Strategic Planning Process. As requested, we have broken out the scope and pricing by milestone.

Discovery & Engagement

- Assess Current State
- Competitive Analysis

Survey Development & Administration

- Resident/Member Survey Distribution
- Employee Engagement Survey

Strategic Planning Retreat Preparation

- Development and distribution of a pre-retreat workbook
- Curated summaries of key findings from Phase 1 & 2
- Board & Leadership Input (SWOT Framework)
 - Strengths, weaknesses, opportunities, and threats (SWOT)
 - Mission, Vision, and Values considerations
 - Aspirational identity and future positioning
 - Brand Clarity

Strategic Plan Development - Facilitated Strategic Planning Retreat

- Validate and refine the SWOT using benchmark and member data
- Clarify current and aspirational brand identity
- Explore tradeoffs between aspiration, financial capacity, and operational reality
- Align the Board and management team around strategic priorities informed by market position and resident expectations
- Develop Critical Success Factors and Key Objectives

SCS applies a disciplined evaluation framework to prioritize recommendations based on:

- Alignment with the community's Mission, Vision, Values, and aspirational identity
- Impact on Resident/Member satisfaction, engagement, retention, and growth
- Financial capacity, capital needs and obligations, funding considerations, and long-term operating impact
- Operational feasibility, staffing implications, and risk

Final Strategic Plan Deliverables:

- Discovery Summary and Opportunity Assessment Report
- Resident/Member Survey Summary and Raw Data Responses

- Member-facing communication with Executive Survey Summary, Mission, Vision, Values, and any other defined statements about current and aspirational identity.
- High-level Critical Success Factors and Key Objectives for the Plan
- Detailed working Strategic Plan Narrative to include initiatives and action steps
- 12-18-month action plan in a working accountability document in Excel, Navigator, or other board portal solution to manage strategic planning progress.

Final recommendations are documented in the Strategic Plan and presented in a prioritized, phased format, with high-level implementation considerations, to ensure decisions are actionable, financially informed, and aligned with long-term sustainability.

Strategic Plan Communication

- Disseminating Information to Resident/Member
- Survey and Engagement Feedback

Ongoing Alignment and Plan Progress

- Throughout the engagement, SCS works with University Park leadership to ensure messaging remains consistent, timely, and aligned with governance protocols
- Communication tools and materials are designed to support transparency, reinforce trust, and set clear expectations for implementation and next steps
- We recommend at least a twice-a-year plan communication cadence to keep the Resident/Member informed about the board and management's progress with the plan implementation

Strategic Planning Timeline - Phase Overview

(timing may vary depending on club availability)

Proposed Start Date	TBD
Site Visit/Focus Group/Discovery	3-6 weeks
Present Member/Resident & Employee Survey Draft	2-3 weeks
Deploy Member/Resident & Employee Survey	3 weeks
Analyze Survey Data/Create Final Report	2-3 weeks
Preparation of Pre-retreat Documents	2-3 weeks
Board/Committee Pre-work	2-3 weeks

Board Retreat	1 day
Management Planning/Implementation Retreat	1 day
Finalize Plan and Create Member Deliverable	3-5 weeks

Research, Discovery, Surveys, and Analysis Findings Report + SWOT	\$37,500
Strategic Plan Process and Plan Deliverables	\$34,500
Annual check-in support and annual plan update	\$14,500

Optional Additional Support and Consulting:

Annual Survey each year for benchmarking \$14,500/year

Quarterly Check-ins for plan maintenance, support, and accountability \$4,500/quarter

Strategic Capital Project Communications for vote or approval \$42,500-\$65,000, depending on scope and scale



7. Credentials and Client Affidavits / References

Firm Overview and History

Founded in 2009, Strategic Club Solutions (SCS) is an award-winning consulting firm dedicated exclusively to private clubs and communities. We bring deep industry expertise, a proven track record of financial and operational success, and a commitment to delivering strategies that strengthen long-term sustainability. You can view and learn more about our company, team, awards, approach, clients, and full-service suite of services at www.strategicclubsolutions.com

Our team has extensive experience operating both for-profit and non-profit clubs and communities, giving us a uniquely well-rounded perspective on balancing member experience, financial performance, and governance alignment. We understand the complexities of club environments and pride ourselves on delivering solutions that are both practical and forward-thinking.

We take tremendous pride in being “hired again”. 88.1% of our clients hire us a second time, and over 81.3% a third time, 71.7% more than 4 times. We understand that private clubs and communities are long-term businesses and value lasting relationships. We partner with our clients to build trust, respect, and get results that drive long-term success.

Our Approach

At SCS, we lead with partnership. We work alongside your Board and management team to understand your goals, challenges, culture, and vision. This allows us to develop a strategic roadmap that is tailored to your club, not a template, but a plan built around your identity, opportunities, and long-term objectives.

Every engagement is highly customized. We listen, analyze, and collaborate to ensure the strategy is actionable, measurable, and aligned with your operational and financial realities.

What You Can Expect From SCS

When you partner with SCS, you gain:

- A seasoned team of award-winning industry experts with decades of hands-on leadership experience across all facets of club operations.
- A long-term strategic vision grounded in data, best practices, and your club’s unique culture and goals.

- Custom-tailored recommendations are designed to support decision-making and organizational alignment. Never a one-size-fits-all.
- A true consulting partner who listens, seeks to know, and understands you as a current and aspirational organization. We collaborate and integrate seamlessly with your team throughout the process.
- Engage, Educate, Enlist, Activate:
 - Engage the stakeholders - board, management, membership, team
 - Educate - share what we learned through our various data collection and due diligence, combined with industry benchmarking against similar clubs.
 - Enlist contributors to align and collaborate
 - Take action so the plan doesn't collect dust on a shelf.

Project Team Biographies for this Project

RYAN DOERR

Founder & CEO of Strategic Club Solutions



Ryan is an award-winning, industry-recognized Club expert and mentor. Since 2009, Ryan has served over 1,400 Private Clubs, HOAs, POAs, and Communities. SCS has received numerous awards, including the Boardroom Excellence in Achievement for the last eight years (2018-2025) in Strategic Planning, Marketing Company, Branding/Communications, Executive Search, and Consulting Company. SCS was awarded Golf Inc. 2018 - 2025 Advisor of the Year, and CIO Applications Top Club Management Solutions Provider. In 2022, Ryan also received the prestigious Gary Player Educator of the Year Award. Ryan has successfully completed hundreds of strategic plans and executive placements for GM/COOs, and key department leaders and directors.

You can view Ryan's full credentials and experience at <https://www.linkedin.com/in/ryandoerr/>

ROB SCHLINGMANN, CCM, CCE, CAM

Sr. Club Consultant & Search Specialist



Rob is a Certified Club Manager (CCM), Certified Club Executive (CCE), and a Community Association Manager (CAM) with over 35 years of experience at some of the finest clubs in America, including Platinum and Distinguished Clubs. Rob has a wealth of experience in all aspects of club & community operations. Rob is an outstanding communicator with a unique ability to truly listen, develop programs, build strong teams, hire exceptional talent, and foster a strong culture for both members and employees. Rob also has decades of experience developing strong strategic plans and using mission, vision, and objectives as guiding principles for a club's success.

Rob also has managed a club community in Florida and is familiar with the FL statutes and requirements

You can view Rob's full credentials and experience at <https://www.linkedin.com/in/rob-schlingmann-ccm-cce-cam-7357996/>

MICHELLE COCITA

Director of Client Success & Organizational Strategy



Michelle brings 15 years of hospitality experience to Strategic Club Solutions, including tenure with The Walt Disney Company, talent recruitment and leadership development at Charlotte Country Club, a Platinum Club of America, and volunteerism focused on student engagement, professional development, and programming. With celebrated successes in hiring and team development in private clubs, Michelle strives to blend creativity and enthusiasm to form team-centric people operations.

You can view Michelle's full credentials and experience at <https://www.linkedin.com/in/michellecocita/>

References from past Strategic Plans and Past/Current Clients

Eagle Creek CC & Community, Naples, Florida

Strategic Plan Completed February 2026

Michael Bell, GM/COO gm@eaglecreekcc.org

David Tilton, Strategic Planning Chair david.tilton@comcast.net

Martis Camp & Community, Truckee, California

Completed Strategic Plan in Q4 2025

Conducting follow-up support for the plan with employee engagement, organizational optimization, and capital improvement communications

Colin O'Hanlin, GM/COO colino@martiscamp.org

John Cassidy, President - john.cassidy@ey.com

Mike Burke, Board Member - mfburke2014@gmail.com

Woman's Athletic Club, Chicago, Illinois

14-year client

Strategic Plan completed Q1 2022,

- Conduct annual planning retreat
- Conduct annual surveys

Scheduled new Strategic Plan for Q1, 2027

Fred Fletcher, GM/COO fred@wacchicago.com

Mira Vista Country Club - Fort Worth, Texas

Strategic Plan - Completed Q2 2025

Greg Hatch, GM, 210-867-8658 (Cell)

Completed a Strategic Plan with team implementation.

Park Ridge Country Club - Park Ridge, Illinois

Strategic Plan - Completed Q4 2022/refresh retreat of Q4 2024

Paul Diaz, General Manager pdiaz@parkridgecc.org 312-805-0315 (Cell)

Jack Wambach, President jrw929@comcast.net

Completed a Strategic Plan with supported team implementation '22/'23 Completed capital project communications projects and focus groups. Completed a few key management searches.

Year-two plan refresh completed Q1 2025

8. Examples of sample deliverables

We are pleased to share sample deliverables from our fictitious club, Riverstone Country Club. To protect our clients' confidentiality, SCS uses a fully developed fictional club to demonstrate the structure, quality, and depth of our work. The examples provided reflect the same formats and standards used in our real strategic planning engagements.



RIVERSTONE
Country Club

Riverstone Country Club

Focus Group Summary

January 2025

StrategicClubSolutions.com | [262.661.CLUB](tel:262.661.CLUB) | Results@StrategicClubSolutions.com



STRATEGIC CLUB SOLUTIONS



Strategic Club Solutions conducted six virtual focus groups with members of Riverstone Country Club between January 10 and 16, 2025. A total of 116 members volunteered, and 92 participated. The majority (62%) have been members for five years or less, while a smaller group (9%) have held membership for more than a decade.

This report provides an anonymous summary of the perspectives shared, reflecting the candid and constructive feedback offered during those sessions.

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Disclaimer: Riverstone Country Club is a fictional example created for demonstration purposes. The content, length, and feedback are illustrative and do not reflect any real club or actual focus group. Not all questions or insights from the sessions are included.

Executive Summary

Strategic Club Solutions hosted six virtual focus groups in January 2025 with Riverstone Country Club members to inform upcoming planning efforts. These sessions provided insight into members' current experiences, perceptions of club culture, and long-term priorities. Most participants were newer members, offering candid perspectives rooted in recent engagement.

- Members praised the Club's approachable, relaxed environment and sense of community, highlighting its friendly, down-to-earth atmosphere.
- Golf continues to be a central reason for joining, with particular appreciation for the pace of play, course condition, and inclusive environment; interest is growing in expanded practice facilities.
- The recent clubhouse upgrades and expanded patio space were noted as elevating the member experience, particularly for casual gatherings and sunset views.
- Service from staff received consistent praise, with members recognizing professionalism, responsiveness, and an increasingly personalized experience.
- Dining quality was one of the most mentioned challenges. While recent changes were acknowledged, members cited inconsistent execution, overuse of themed buffets, and limited variety.
- Many participants expressed a desire for basic fitness and wellness offerings such as a small gym, walking paths, or yoga classes, provided they remain complementary to the Club's core offerings.
- Members commonly flagged the locker rooms, bag drop, and rear entry as spaces in need of both functional and aesthetic improvement.
- Communication effectiveness varies. While the app is generally appreciated, email formats and message clarity were seen as inconsistent and at times overwhelming.
- Members support phased capital investments that align with member priorities and maintain financial stability, favoring transparency and member input.

Overall, Riverstone members described a positive, comfortable club culture with high potential for strategic enhancements. Their feedback will inform the design of the upcoming member survey to ensure key themes and sentiments are explored more broadly.

Membership Value

What aspects of your Club membership do you value most today?

Summary

- Golf is consistently the most valued feature, especially for its playability, friendly culture, and accessibility to all levels of players.
- Members deeply appreciate the welcoming social environment, emphasizing genuine camaraderie, connection, and a low-key, community feel.
- Staff members are highlighted for their positive attitude, service focus, and familiarity with members' names and preferences.
- The upgraded outdoor areas, clubhouse spaces, and fire pit patio are viewed as positive enhancements to the member experience.
- Dining convenience and the ability to use the Club in different ways, from casual drop-ins to celebratory meals, are frequently cited as benefits.

Verbatim

- *The course is great. It's playable and never overly crowded.*
- *I value the relaxed feel and the lack of pretension here.*
- *We joined for golf, but stayed for the people.*
- *The fire pit has become our favorite place to unwind.*
- *The staff knows us by name. It feels personal.*
- *I can always get a tee time, and pace is good.*
- *The patio is perfect for sunset drinks.*
- *I like that this is a club where everyone says hello.*
- *Dining is convenient and dependable, even if it could be better.*
- *The social groups are welcoming. I felt included right away.*
- *The team here is attentive without being overbearing.*
- *Golf for both men and women is equally respected.*
- *I've brought friends here who ended up joining because the experience was so good.*
- *There's a real neighborhood vibe.*
- *It's a great mix of ages and interests without being too big.*
- *The renovated areas made a big difference.*
- *We come several times a week. It's part of our lifestyle now.*
- *I appreciate the board's fiscal responsibility.*
- *There's no pretense here. It's just easy.*
- *I feel like I belong, and I didn't expect that.*

Club Culture

How would you describe the Club's culture to someone considering Moorings for membership?

Summary

- Riverstone is widely described as friendly, welcoming, and relaxed, a place where members feel immediately comfortable and free to be themselves.
- The Club's culture is perceived as inclusive and low-key, emphasizing connection over status and authenticity over formality.
- Members consistently highlight that it feels more like a social neighborhood hub than a traditional, buttoned-up country club.
- Staff consistency and familiarity play a critical role in maintaining this approachable environment, and many noted how easily friendships are formed across demographics.
- There is strong desire to preserve this culture as the Club grows, with members advocating for thoughtful growth that doesn't compromise the existing spirit.

Verbatim

- *It's casual but still polished, not stuffy at all.*
- *You can show up in shorts and still feel like you belong.*
- *This place is more social club than country club, in the best way.*
- *We looked at other clubs and chose Riverstone because of the people.*
- *Everyone's here to enjoy themselves, not to compete.*
- *There's a shared sense that we're all part of the same community.*
- *It doesn't feel like people are trying to impress each other.*
- *Warm, relaxed, and real.*
- *I've made more friends here than I expected.*
- *I feel comfortable coming here alone or with guests — it's not intimidating.*
- *The culture feels accessible regardless of age or background.*
- *Our kids feel welcome here, too.*
- *I hope we don't grow too fast and lose this vibe.*
- *We love that it's not pretentious, just a good group of people.*
- *The Club does a great job of making it easy to connect.*
- *This is a club where you can be yourself.*
- *We're not flashy, and that's exactly why we joined.*
- *It feels like an extension of our neighborhood.*

Programming and Events

Thinking about programming and events, what's working well, and where is there room for improvement?

Summary

- Signature events such as wine dinners, trivia nights, and outdoor concerts are well attended and appreciated, especially when they're well-timed and thoughtfully executed.
- Members expressed interest in a broader variety of events catering to all age groups, especially younger couples, working members, and summer residents.
- There were frequent requests for more casual gatherings like happy hours, themed socials, and seasonal weekend events that encourage drop-in participation.
- Some concerns were raised about predictability in programming — several members noted that events can feel repetitive or heavily centered around food without variation.
- Members requested improvements in timing, communication, and event registration, as well as expanded offerings on weekends and during off-season months.

Verbatim

- *We love the outdoor events (music, fire pits, food trucks) more of that!*
- *Trivia has been fun, but it could use better questions and pacing.*
- *Would like to see more things for younger members or those who work full time.*
- *Sunday brunch events or casual BBQs would be great.*
- *Themed events that aren't just food-focused, maybe games, tastings, or local speakers?*
- *Events tend to repeat the same formula, mix it up more.*
- *Happy hour was a big miss when it disappeared, bring that back.*
- *Would be nice to have things for families or multigenerational members.*
- *Love the live music, but sometimes the volume is too high.*
- *We attend a lot, but it's hard to know what's coming up unless someone tells us.*
- *Add more casual things where people can show up without RSVPing two weeks ahead.*
- *We need more weekend evening options. Saturday nights are too quiet.*
- *I'd like some events that aren't tied to dinner. That makes it more flexible.*
- *Sometimes the buffets dominate the event. I'd rather have light bites and conversation.*
- *Would love a sunset cocktail series on the patio.*
- *Let's make use of the outdoor space more often.*

Golf

Thinking about golf, what's working well, and where is there room for improvement?

Summary

- Golf is consistently the most valued feature, especially for its playability, friendly culture, and accessibility to all levels of players.
- Members deeply appreciate the welcoming social environment, emphasizing genuine camaraderie, connection, and a low-key, community feel.
- Staff members are highlighted for their positive attitude, service focus, and familiarity with members' names and preferences.
- The upgraded outdoor areas, clubhouse spaces, and fire pit patio are viewed as positive enhancements to the member experience.
- Dining convenience and the ability to use the Club in different ways — from casual drop-ins to celebratory meals — are frequently cited as benefits.

Verbatim

- *We need a robust practice facility, not just putting or chipping.*
- *New irrigation system.*
- *Keep the golf course pristine.*
- *The course is great, I love playing a quick round without delays, so managing club growth is key.*
- *Concerns: practice area (with swing bays and simulator), sand traps, irrigation, cart barn, and dues. Develop financial packages aligned with goals to clarify future improvements.*
- *Too many carts, need more walkers.*
- *We want to walk the course, would like benches at various holes.*
- *No-shows, what happens? Charge after repeated incidents?*
- *Staff does well.*
- *Tired, but great.*
- *Would like a bathroom on the front 9.*
- *Golf is great.*
- *Great chance to join groups, the pros should take more initiative in setting them up.*

Staff and Service

Thinking about staff and service, what's working well, and where is there room for improvement?

Summary

- Overall, members described staff as a bright spot in their experience, frequently noting the team's friendliness, professionalism, and personal touch.
- Many praised the consistency of service in day-to-day interactions and acknowledged visible efforts to improve training and team culture.
- A few members mentioned service challenges during larger events, especially when it came to timing, restocking, and response times, pointing to a need for stronger event staffing models.
- Several members appreciated that newer team members are eager, attentive, and working to learn names and preferences quickly, though consistency can still vary by shift or department.
- Staff recognition, continued development, and retention were named as important areas of focus as the Club continues to grow.

Verbatim

- *The team is always warm and welcoming.*
- *We've noticed a big improvement in service over the past year.*
- *I appreciate that they know our names.*
- *Service at lunch is consistently strong.*
- *A recent event felt short-staffed, but the team handled it well.*
- *Sometimes the buffets run low, would love more proactive restocking.*
- *Staff turnover happens everywhere, but Riverstone handles it better than most.*
- *New servers are doing a great job picking things up.*
- *Events could use more hands, maybe fewer plated meals if we can't staff them fully?*
- *We had a few rocky dinners early on, but that seems to be improving.*

Food and Beverage

Thinking about food and beverage, what's working well, and where is there room for improvement?

Summary

- Member feedback on dining was varied, with most acknowledging improvement but still citing inconsistent quality between visits.
- The Club's takeout program is viewed favorably for its reliability and ease, while dine-in meals have received mixed reviews depending on the dish, timing, and staffing.
- Buffets, especially at events, were frequently flagged as a weakness — members asked for more plated options, fresher ingredients, and better coordination during service.
- Many members expressed a desire for more à la carte evenings, greater variety in the weekly menus, and fewer dishes that are heavily spiced or overly complex.
- Dietary preferences, basic menu staples, and alternative formats (e.g., lighter meals, snack options, breakfast availability) were cited as opportunities for improvement.
- The bar and patio areas were noted as bright spots, with members appreciating the energy and flexibility they bring to casual dining.

Verbatim

- *The bar vibe is great, easy to pop in and grab something light.*
- *I think the kitchen is trying, but it's hit or miss.*
- *We love the convenience of takeout, it's been consistent.*
- *Buffets at events are not my favorite, the food feels tired by the time we eat.*
- *More variety, fewer rich sauces. Keep it simple.*
- *We've had some great dinners and some forgettable ones.*
- *It's a challenge when the menu doesn't rotate enough. We're here often.*
- *Sunday night takeout would be a great option.*
- *I hesitate to bring guests sometimes, not sure what we're going to get.*
- *Plated meals are generally better, there is more attention to detail.*
- *Loved the food at the wine dinner.*
- *We need more vegetarian options and better labeling for allergens.*
- *The new chef has potential, I'd love to see more consistency.*
- *Some nights are great, others feel like a different kitchen.*
- *The Derby event was excellent, so the bar is clearly high.*
- *Lighter lunch options would be a welcome change.*
- *More à la carte nights, fewer theme buffets, please.*

Facilities

Thinking about facilities, what's working well, and where is there room for improvement?

Summary

- Members praised the recent renovations, noting that refreshed common areas have elevated the overall experience and appeal of the Club.
- The member arrival experience — including the front drive, entry walkway, and landscaping — was frequently cited as needing attention, both aesthetically and functionally.
- Suggestions for near-term improvements focused on locker rooms, the cart barn, and the pro shop, along with requests for showers and better design cohesion across campus.
- Long-term ideas included adding second-story space, banquet or meeting rooms, and a small fitness or wellness facility to serve member needs.
- General upkeep — including storage areas, aging infrastructure, and inconsistencies in finishes — was mentioned as a recurring concern in maintaining a polished and professional environment.

Verbatim

- *The entrance doesn't match the quality of what's inside — it's the first impression and should be more inviting.*
- *I'd love to see lighting improved along the front walkway — it feels dark at night.*
- *Locker rooms are functional but not appealing — a refresh would go a long way.*
- *The updated areas look fantastic, but the back of house is lagging behind.*
- *We're missing an opportunity to generate revenue in underutilized spaces.*
- *The cart barn is tight and dated — could we add storage or go vertical?*
- *Would love to see showers added, even just one or two per locker room.*
- *The north end of the Club needs help — it feels forgotten.*
- *The umbrellas and canopies feel mismatched now — we need a cohesive look.*
- *The pro shop is fine but could be modernized to match the rest of the facility.*
- *If we're not touching the golf course yet, let's focus on visible upgrades.*
- *Landscaping and exterior maintenance could use more attention.*
- *A wellness room or small gym would round out the amenities.*
- *The arrival drive could use landscaping and better signage.*
- *I'd support a plan that adds function and polish without overbuilding.*
- *Pro shop and cart barn should be remodeled with coastal island architecture; add second-floor men's locker room and bar overlooking the 9th green.*
- *Space is limited, but showers are necessary for nearby members.*
- *Facility improvements in the next 3–4 years will add value and keep MCC competitive.*

Communication

Thinking about communication, what's working well, and where is there room for improvement?

Summary

- Members generally appreciate the Club's reservation app and want to see it expanded to include menus, event sign-ups, and push notifications for easier access.
- Feedback on email communications was mixed — some members find the content helpful, while others view it as cluttered, overly frequent, or difficult to navigate.
- Suggestions include simplifying email layouts, unifying branding across departments, and improving clarity on what's happening and when.
- Members expressed interest in a centralized calendar that's easy to find and use, as well as timely reminders for events they've registered for.
- There is also interest in channels for two-way feedback, including digital tools or simple in-club solutions to make member input easier to share.

Verbatim

- *The app works well, but I'd love to see the menu on there too.*
- *It feels like emails are coming from five different sources.*
- *Some weeks, I get three or four emails — it's too much.*
- *A cleaner layout would help — I can't always tell what's current.*
- *I usually rely on word of mouth to know what's going on.*
- *The weekly emails are helpful, but I'd prefer a visual calendar.*
- *It would be great if the app could send a reminder when I'm signed up for something.*
- *There's a lot of good info, but it needs to be better organized.*
- *A suggestion box or online feedback option would be useful.*
- *Staff is approachable — I feel comfortable bringing things up.*
- *Focus groups were a great idea — I appreciated being asked.*
- *We need more clarity on what's open and when, especially off-season.*
- *I think communications are improving — just need a little tightening up.*
- *The current system works, but it could be more intuitive.*

Additional Amenities, Experiences, or Programs

What additional amenities, experiences, or programs would enhance your membership?

Summary

- Expanded golf practice amenities remain a top request — including a full driving range, enhanced putting and chipping areas, a halfway house, and GPS-enabled golf carts.
- Many members expressed interest in wellness-focused additions such as a compact fitness room, showers, small group classes like yoga or Pilates, and climate-controlled storage or recovery areas.
- Social programming opportunities outside of golf were also emphasized, with suggestions for cooking classes, wine tastings, lecture series, and casual member mixers.
- Dining enhancements were raised frequently, including more varied menus, flexible dining options, and experiential features like outdoor cooking or themed nights.
- Pickleball and bocce continue to come up as desired additions, especially with improved shade, surface quality, and scheduling.

Verbatim

- *A proper practice area is long overdue, especially short game.*
- *I'd support a driving range even if it's compact or netted.*
- *Golf carts with GPS would be a nice upgrade.*
- *Add something between holes for a quick snack or drink.*
- *Small group fitness classes would help members connect.*
- *We'd use a fitness room on-site, I don't want to leave the Club.*
- *Mold on cart covers shows we need better storage conditions.*
- *A lap pool or recovery zone would be a good complement.*
- *Wine tastings or cooking demos could bring people together.*
- *Themed dining nights are fun, let's do more of that.*
- *Outdoor pizza oven? Yes, please.*
- *We've been here a year and still struggle to meet people outside golf.*
- *Add shaded pickleball courts and rotate open play times.*
- *I'd attend more events if there were non-golf ways to connect.*
- *More amenities don't have to be big, just thoughtful.*

Balancing Potential Costs

When thinking about future improvements, how do you feel about balancing enhancements with potential costs (e.g., assessments, dues increases, or phased development)?

Summary

- Members generally support a fiscally conservative approach, emphasizing the importance of no debt, thoughtful prioritization, and staying within budget.
- There is openness to modest assessments or capital dues increases, especially when tied directly to visible, high-priority projects with a clear return on value.
- Many noted that temporary or one-time assessments are easier to accept than permanent dues increases, particularly when they are well-communicated and phased.
- Some members expressed concern about expanding into non-core amenities, preferring to focus resources on golf, infrastructure, and improvements that benefit the majority.
- Transparency, cost-benefit clarity, and timing were recurring themes, with members wanting a clear understanding of how funds will be used and how improvements will be rolled out.

Verbatim

- *I'm okay with an assessment, as long as I know where it's going.*
- *No debt. Stay within our means.*
- *A phased approach makes sense, not everything has to happen at once.*
- *I'd rather have a one-time assessment than a permanent dues hike.*
- *Be selective, focus on what benefits the most people.*
- *We've gotten good value from previous investments. Just be clear about the plan.*
- *If it's tied to a project we can see and use, I'll support it.*
- *Avoid surprises, we need good communication and lead time.*
- *If it's done right, small assessments are manageable.*
- *Don't overextend. There's a fine line between enhancing and overbuilding.*
- *Let's keep a balance between aspirational and practical.*
- *Some ideas are exciting, but let's not lose focus on the essentials.*
- *Show how revenue or usage will help offset the cost, that matters.*
- *With interest rates and the economy, we have to be cautious.*
- *I'm less concerned about the number and more about the value.*



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RIVERSTONE
Country Club

Riverstone Country Club
Pre-Retreat Workbook Summary
March 2025

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In March 2025, Strategic Club Solutions facilitated a "Pre-Retreat Workbook" in preparation for Riverstone Country Club's Strategic Planning Retreat. The workbook was designed to gather insights and feedback from board members, strategic planning committee members, and the Club's leadership team to guide the retreat discussions. **Twenty-four board, committee, and team members participated, with 66.7% having previous experience in strategic planning.**

The insights gathered have been summarized and presented in two formats:

1. Key summary points based on participant feedback.
2. A summary of responses organized into key themes.

This comprehensive summary serves as a foundation for shaping the conversation at the upcoming Strategic Planning Retreat.

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Disclaimer: Riverstone Country Club is a fictional example created for demonstration purposes. The content, length, and comments are illustrative and do not reflect any actual club or leadership team. This summary is an abridged version of a full pre-retreat workbook.

Critical Priorities and Goals

What are the critical priorities and goals that RCC must focus on over the next three to five years?

Summary

- A long-term facilities plan is needed, including a complete clubhouse remodel, infrastructure repairs, comfort station upgrades, and planning for ongoing capital improvements.
- Enhancements to food and beverage operations include kitchen improvements, a defined service model, and elevated execution standards aligned with member expectations.
- Financial priorities include establishing appropriate initiation fees, paying off existing debt, managing ongoing improvement costs, and aligning financial planning with future growth.

Response Key Themes and Categories

Verbatim Comments

- **Facilities & Infrastructure**
 - Complete clubhouse remodel (including kitchen relocation, ballroom redesign, bus station, and admin office relocation).
 - Address infrastructure issues (sewage, water under building).
 - Long-term facilities plan and capital replacement plan.
 - Golf course comfort stations upgrade.
- **Financial Strategy**
 - Figure out a long-term financial plan.
 - Establish new initiation fee aligned with upgraded club experience.
 - Pay off incurred debt.
 - Balance financial sustainability with member satisfaction.
- **Leadership, Governance & Culture**
 - Improve leadership culture with high expectations and accountability.
 - Align staff with club direction and service excellence culture.
 - Eliminate staff/member blame culture, emphasize ownership and growth.
 - Define and implement a clear identity for the club and staff.
- **Vision & Strategic Planning**
 - Define who the club is and who it wants to be.
 - Create a long-term identity and strategic direction for all departments (golf, racquet, F&B, social).
 - Use member feedback to shape strategy.
 - Ensure ongoing planning vs. one-time projects (continuous improvement culture).

Current Strengths

What are the current strengths of RCC?

Summary of Responses

- RCC's golf course, programming, and practice facilities are highly regarded and will be further elevated with the upcoming course renovation.
- The Club's membership is known for its welcoming, friendly culture, strong engagement, and growing diversity.
- Staff and leadership are experienced, collaborative, and recognized for delivering high-quality, personalized service across all departments.
- Riverstone has a strong identity and market reputation as an elite yet approachable country club with a balanced, inclusive culture.

Response Key Themes

Verbatim Comments

- **Golf Course & Programming**
 - High-quality golf course with strong post-renovation appeal.
 - Best practice facility in Fort Worth area.
 - Highly regarded member-guest tournaments.
 - Strong golf programming and staff performance.
- **Membership & Culture**
 - Welcoming and friendly membership culture.
 - Members actively help new members get involved.
 - Diverse and growing membership base.
 - Strong community feel and member camaraderie.
- **Staff & Leadership**
 - Experienced and effective club leadership team.
 - Strong team leaders who invest in member experience.
 - Friendly, long-tenured staff provide continuity and warmth.
 - Staff know members by name and offer personalized service.
- **Facilities & Amenities**
 - Top-tier pickleball and tennis facilities.
 - Racquet sports programming under expert direction.
 - Comprehensive club amenities contribute to overall appeal.
 - Gated residential community location enhances value.
- **Club Identity & Market Reputation**
 - Recognized as a family-oriented, fun, and elite club experience.
 - Strong brand reputation in Fort Worth market.
 - Momentum from renovation supports long-term positioning.

Current Weaknesses

What are the current weaknesses of RCC?

Summary of Responses

- Aging infrastructure, including the clubhouse, kitchen, workout, and event facilities, limits service capabilities and member satisfaction.
- Food and beverage operations continue to face service inconsistency, staff turnover, and facility limitations that impact quality and efficiency.
- Leadership turnover, limited member input on decisions, and perceived disconnect in governance contribute to organizational uncertainty.
- Communication and transparency issues hinder trust and member alignment on major initiatives and club direction.
- Engagement challenges persist across non-golf activities, with varying member expectations and a need for better technology integration in club services.

Response Key Themes

[Verbatim Comments](#)

- **Facilities & Infrastructure**
 - Aging clubhouse and outdated facilities (kitchen, workout areas, ballroom).
 - Pointe kitchen too small to support growing demand.
 - Lack of proper coed fitness facility or group exercise rooms.
 - Limited storage and infrastructure constraints impact operations.
- **Food & Beverage Operations**
 - Inconsistent food quality and service standards.
 - Staff turnover in F&B remains a challenge.
 - Menu size and kitchen limitations lead to inefficiencies.
 - Lack of competitive culinary experience compared to other clubs.
- **Leadership & Governance**
 - Frequent leadership turnover disrupts continuity.
 - Lack of member voting on key issues and perceived lack of representation.
 - Concerns about Junior Executive board representation without financial investment.
- **Communication & Transparency**
 - Lack of transparency in decisions and capital project planning.
 - Insufficient communication regarding events, renovations, and policies.
- **Staffing & Culture**
 - High turnover reduces service consistency and member-staff relationships.
 - Inconsistent service culture and lack of clear expectations.
 - Staff morale affected by unclear leadership and oversight.
 - Disconnect between staff and members creates friction.

Opportunities for Growth

Where do you see opportunities for growth at Riverstone CC?

Summary of Responses

- Enhancing facilities (clubhouse remodels, comfort stations, fitness spaces, and dining areas) represents a significant opportunity for long-term member satisfaction.
- Food and beverage improvements, including quality, service, staffing, and infrastructure, are key areas for investment to meet member expectations.
- Leadership development, staffing structure, and digital marketing roles are opportunities to modernize and elevate the club's service culture and operational impact.
- Opportunities exist in governance, technology upgrades, and financial strategy to strengthen member involvement and support sustainable long-term growth.

Response Key Themes

[Verbatim Comments](#)

- **Facilities & Infrastructure Enhancements**
 - Enhance and enclose comfort stations on the golf course.
 - Improve workout facilities and add group fitness areas.
 - Enclose and upgrade pickleball courts and add member services (car wash).
- **Food & Beverage Program Improvements**
 - Elevate food quality and wine/cocktail service.
 - Refine menu scope to improve service efficiency and reduce costs.
 - Hire leadership with a service-driven mindset.
- **Membership Growth & Experience**
 - Grow golf membership to full capacity of 575.
 - Enhance member experience across departments and services.
 - Develop a 'premier experience' positioning post-renovation.
- **Leadership & Staffing Development**
 - Develop leadership training to strengthen middle management.
 - Foster a staff culture of engagement and longevity.
 - Realign club operations around high standards and accountability.
- **Technology & Operations Modernization**
 - Invest in mobile POS, online tee time booking, and advanced registration systems.
 - Improve technology tools for board/committee meetings and operations.
 - Leverage digital marketing and communication platforms.
 - Enhance operational efficiency through digital workflows and service tools.
- **Governance & Financial Strategy**
 - Give members more voting power on strategic decisions.
 - Set pricing strategies that match club's quality and new facilities.

Changes and Trends

What changes or trends in the market should we consider as we embark on long-range planning?

Summary of Responses

- The competitive landscape is shifting with the addition of new high-end clubs in the region, requiring RCC to clearly define its market positioning.
- Member expectations are evolving toward comprehensive lifestyle and social experiences, beyond just golf amenities.
- Technology integration is increasingly important for member engagement, operational efficiency, and brand visibility.
- Long-term planning must reflect demographic shifts, financial strategy, and a clearly articulated identity to ensure sustainable growth.

Response Key Themes and Categories

Verbatim Comments

- **Competitive Market Landscape**
 - Emergence of new high-end clubs in the Fort Worth area with higher dues and luxury amenities.
 - Need to define whether the club will compete as a premier or middle-tier club.
 - Opportunities to recalibrate pricing strategy around a higher-value offering.
 - Ongoing need to differentiate RCC amid increasing competition.
- **Amenities & Member Experience**
 - Interactive, all-day-use club models are becoming more attractive to members.
 - Need to enhance overall experience beyond golf with lifestyle amenities.
 - Service standards must evolve to align with higher member expectations.
- **Facilities Modernization**
 - Coed and group workout spaces are increasingly expected.
 - Avoiding deferred maintenance and emphasizing proactive renovation planning.
 - Commitment to maintaining facility quality to avoid future overhaul costs.
 - Capital project planning should anticipate growth, not just react to issues.
- **Technology & Digital Innovation**
 - Online engagement platforms to increase member connection and convenience.
 - Technology upgrades support member satisfaction and reduce staff burden.
 - Digital communication and social media presence are vital for brand relevance.
- **Governance & Financial Strategy**
 - Revisit initiation fee and dues models aligned with elevated value proposition.
 - Build capital reserve funds and plan proactively through CAPEX budgeting.
 - Avoid overextension of physical plant without corresponding infrastructure expansion.

Stakeholder Expectations

Are there any expectations from stakeholders that need to be met?

Summary of Responses

- Members expect improved food and beverage quality, consistency, and service that reflects the value of their investment.
- Transparent communication, survey follow-up, and inclusive action planning are critical to strengthening trust.
- Stakeholders desire inclusive, high-quality member experiences and enhanced day-to-day engagement.
- Employees expect a respectful workplace, competitive compensation, and recognition for their contributions.

Response Key Themes and Categories

Verbatim Comments

- **Communication & Transparency**
 - Frequent and transparent updates on initiatives and survey results.
 - Member involvement in action planning and decision-making.
 - Clear and honest communication about club strategy and planning.
 - Education on club finances and long-term planning priorities.
- **Facilities & Amenities Investment**
 - Continued investment in top-priority improvements like clubhouse, kitchen, and comfort stations.
 - Members expect visible value from assessments and dues.
 - Balanced investment in infrastructure and daily experience enhancements.
- **Member Inclusion & Experience**
 - Member expectations include meaningful involvement in shaping club culture.
 - Opportunities to enhance the collective member experience without individual preferences dominating.
 - Delivery of experiences that elevate value regardless of cost.
- **Financial Stewardship & Governance**
 - Responsible financial management and debt payoff expectations.
 - Maintenance of reserve funds and strong financial footing.
 - Sound governance practices reflecting diverse member representation.
 - Clear financial planning aligned with member expectations.
- **Employee Support & Work Environment**
 - Competitive compensation and benefit structures to retain talent.
 - Positive workplace culture and autonomy for department managers.
 - Respectful member behavior toward staff.
 - Recognition and appreciation for employee efforts and contributions.

Board Self-Evaluation – Year-to-Year Comparison	2024	2025	Change
Our Board is proactive as a group in its efforts to understand the views of Club members.	4.54	4.88	7.49%
Board members prioritize the interests of the Club above personal or constituent interests.	4.09	4.66	13.94%
The Board holds itself accountable to Club members for its performance.	4.36	4.66	6.88%
The Board communicates with members in a timely and transparent manner.	4.36	4.33	-0.69%
Board members share a common vision for what is best for the Club, both now and in the future.	4.36	4.33	-0.69%
The Board consistently thinks and acts strategically.	4.18	4.33	3.59%
The content of Board meetings is appropriate for a governing body.	4.36	4.11	-5.73%
New Board members are prepared to contribute early in their terms.		4.11	
The Board communicates with the members in a timely, transparent manner.	4.18	4.56	9.09%
Committees are appropriately sized, comprise suitable members, and have clearly defined responsibilities.	4.09	4.23	3.42%
Committee reports are timely, comprehensive, concise, and valuable.	4.09	4.44	8.56%
The Board operates in a climate of trust.	4.54	4	-11.89%
Board members support Board decisions outside the boardroom, even if they disagree.	4.18	4.77	14.11%
Board members' individual views are respected by their colleagues.	4.36	4.77	9.40%
The Nominating Committee receives appropriate guidance on the qualities needed in Board candidates.	4.45	4.66	4.72%
Board members respect confidential information outside of Board meetings.	4.09	3.33	-18.58%
Board meetings allow adequate time for thorough discussion of issues.	4.00	4.44	11.00%
Board meetings are generally conducted efficiently.	4.09	4.11	0.49%
The Board receives sufficient training on governance principles and practices.	4.36	4.32	-0.92%
Individual Board members are held accountable for their performance.	3.81	4.12	8.14%
The Board acts in accordance with its role as policymakers, rather than as implementers of operations.	4.36	4.55	4.36%
The Board holds the GM accountable for achieving their objectives.	4.36	4.22	-3.21%
All Board members understand the process for evaluating the GM's performance.	4.27	3.77	-11.71%
All Board members have adequate opportunities to share their views on the General Manager's goals.	4.27	4	-6.32%
The goals for GM's evaluation appropriately reflect the key priorities of their role.	4.40	4.23	-3.86%
Board receives timely and sufficient information to monitor operational performance.	4.30	3.87	-10.00%
Overall, the Board is both efficient and effective.	4.30	4.33	0.70%



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Critical Success Factors

April 2025

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This document outlines the Critical Success Factors (CSFs) identified as essential to the future success of Riverstone Country Club. Each CSF is supported by 3-5 high-level key objectives that begin to shape a clear path toward implementation. These key objectives are not exhaustive, but serve as a foundational framework to guide strategic action planning and prioritization.

Strategic Plan Architecture

Critical Success Factor:

Area of Focus:

Who:

Measureable Metrics:

Key Objectives

1. A key objective is a strategic outcome the Club must achieve to make meaningful progress within a specific Critical Success Factor.
 - a. Action Step
2. Key objectives guide decision-making and help translate broad priorities into actionable goals.
 - a. Action Step
3. Each key objective represents a measurable target that aligns operations with the Club's long-term vision.
 - a. Action Step

Critical Success Factors

CSF1: Sustaining Club Assets	2
CSF2: Future-Focused Campus Planning	3
CSF3: Clarifying Leadership & Governance	4
CSF4: People Strategy	5
CSF5: Operations & Membership Experience	6

Disclaimer: Riverstone Country Club is a fictional example created for demonstration purposes. The content, length, and topics covered are illustrative and do not reflect any actual club. This document is an abridged version of a comprehensive deliverable.

CSF1: Sustaining Club Assets

Area of Focus: Ensure that all club facilities and infrastructure are well-maintained, properly funded, and positioned for long-term durability.

Who: General Manager, Controller, Department Heads, Finance Committee, Board

Measureable Metrics:

- Reserve study completed and reviewed by Board (Target: Q4 2025)
- 5–10 year capital plan with tiered projects approved (Target: Q1 2026)
- Monthly capital reporting in place and used consistently
- % of deferred projects funded or in progress year-over-year

Key Objectives

4. Commission a third-party capital reserve study with a full asset inventory.
 - a. Research and vet firms with private club capital planning expertise.
 - b. Define the scope of work, including expected asset lifespan data and cost projections.
 - c. Schedule walkthroughs and site visits with Facilities and Department Heads.
5. Create a 5–10 year capital funding plan with priority tiers.
 - a. Prioritize projects based on urgency, member impact, and replacement cycles.
 - b. Assign tiers (urgent, near-term, long-term) with estimated cost and timing.
 - c. Map funding needs year-over-year to assess cash flow implications.
6. Model scenarios using capital dues, initiation fees, and other revenue sources.
 - a. Use historical revenue and membership trends to project capital income.
 - b. Build 2–3 funding models (e.g., dues only, dues + assessments, dues + initiation).
 - c. Review impact of each model on reserves, debt, and cash availability.
7. Ensure capital funds are tracked and separated from operations.
 - a. Set up distinct GL codes and accounts for capital vs. operational expenses.
 - b. Implement monthly reporting to monitor fund balances and allocations.
 - c. Train department heads to use capital request forms and proper coding.
8. Identify deferred capital items and create a plan to resolve backlog.
 - a. Review prior years' budgets and maintenance records for deferred projects.
 - b. Inspect assets and validate conditions with the facilities team.
 - c. Integrate backlog items into the 5–10 year capital plan with funding priority.

CSF2: Future-Focused Campus Planning

Area of Focus: Create a long-range, member-supported plan for all major capital improvements across the Club's campus.

Who: General Manager, Board, Finance Committee, Long-Range Planning Committee, Department Heads, Architect or Planning Consultant (as needed)

Measureable Metrics:

- Master Campus Plan completed and adopted by Board (Target: Q2 2026)
- Member engagement milestones completed (e.g., surveys, forums)
- Voting materials professionally prepared and distributed (as applicable)
- Timeline and funding strategies established for each major phase

Key Objectives

1. Develop a comprehensive Master Campus Plan
 - a. Engage architect/planning partner with private club experience.
 - b. Establish scope to include all facilities and future amenities.
 - c. Facilitate input sessions with Board, staff, and members.
2. Align planning with trends, demographics, and membership data
 - a. Conduct demographic and usage analysis to inform future needs.
 - b. Use benchmarking data from peer clubs and market studies.
 - c. Validate proposed projects against current and projected demand.
3. Assess and prioritize renovation options for key facilities
 - a. Evaluate clubhouse needs including dining, kitchen, and event space.
 - b. Review options for family, casual, and formal member areas.
 - c. Analyze Pool, Racquets, and Fitness for functionality and growth.
4. Evaluate additional enhancements and campus infrastructure
 - a. Review concepts such as indoor golf, comfort stations, and parking upgrades.
 - b. Assess technology infrastructure including Wi-Fi and AV systems.
 - c. Confirm regulatory and permitting considerations early in planning.
5. Model funding and phasing strategies for major capital projects
 - a. Create multiple funding models using capital dues, reserves, or assessments.
 - b. Phase large projects over time to reduce disruption and control costs.
 - c. Conduct financial modeling for long-term operating impacts.
6. Evaluate additional enhancements and campus infrastructure
 - a. Review concepts such as indoor golf, comfort stations, and parking upgrades.
 - b. Assess technology infrastructure including Wi-Fi and AV systems.
 - c. Confirm regulatory and permitting considerations early in planning.

CSF3: Clarifying Leadership & Governance

Area of Focus: Strengthen alignment between the Board, management, and committees through role clarity, structured communication, and modern governance practices.

Who: Board of Directors, General Manager/COO, Governance Committee, Nominating Committee, Committee Chairs, Department Heads

Measureable Metrics:

- Roles & Responsibilities Matrix adopted and in use (Target: Q1 2026)
- Board Policy Manual created and maintained
- Board and Committee orientation updated and delivered annually
- Member engagement touchpoints (e.g., Town Halls, Coffee Talks) scheduled and executed
- Governance documents reviewed and updated (Bylaws, charters, voting procedures)

Key Objectives

1. Define clear roles and responsibilities for Board, GM, and Committees
 - a. Create a Roles & Responsibilities Matrix with input from governance experts.
 - b. Confirm and communicate the GM’s authority and operational scope.
 - c. Clarify advisory versus decision-making responsibilities across groups.
2. Increase transparency and communication across leadership
 - a. Launch monthly GM and Board updates to members via email or newsletter.
 - b. Hold regular Town Halls or “Coffee with the GM” sessions.
 - c. Post approved Board and Committee minutes in the members-only portal.
3. Strengthen Board and Committee structure and onboarding
 - a. Update and deliver an annual orientation for Board members.
 - b. Create committee charters and a formal onboarding process for chairs.
 - c. Establish a Governance Committee to oversee board development.
4. Enhance the Nominating Committee and board candidate process
 - a. Reassess qualifications and expectations for Board service.
 - b. Build a pipeline of future Board candidates through mentorship or shadowing.
 - c. Establish a formal evaluation process for the Nominating Committee’s work.
5. Review governance documents and update as needed
 - a. Conduct a comprehensive review of Club Bylaws for clarity and relevance.
 - b. Define thresholds for member votes on major capital projects or debt.
 - c. Clarify non-voting Board roles, term limits, and committee voting structures.

CSF4: People Strategy

Area of Focus: Build a strong employer brand by improving employee experience, satisfaction, and retention across all departments.

Who: General Manager/COO, Department Heads, Human Resources

Measureable Metrics:

- Annual employee satisfaction survey completed with >75% participation
- Year-over-year retention rate improvement by department
- Rewards and recognition program implemented with usage tracked monthly
- Updated onboarding and training processes completed and documented
- Improvement in employee engagement scores by department

Key Objectives

1. Attract and retain high-quality employees
 - a. Evaluate the effectiveness of referral programs, sign-on bonuses, and seasonal incentives.
 - b. Strengthen presence on job platforms (Indeed, LinkedIn) with updated, brand-aligned listings.
 - c. Track retention trends and exit data to inform hiring strategies.
2. Enhance employee recognition and rewards programs
 - a. Establish a structured recognition calendar and annual budget.
 - b. Develop cross-department employee appreciation initiatives.
 - c. Promote reward programs regularly through internal communications.
3. Improve employee workspaces and support environments
 - a. Audit and update staff break areas and locker rooms for cleanliness, comfort, and function.
 - b. Create a staff-led task force to provide input on needed improvements.
 - c. Present a renovation and investment plan for Board or GM approval.
4. Strengthen onboarding and integration processes
 - a. Streamline administrative paperwork and offer a consistent orientation experience.
 - b. Include cultural onboarding components (e.g., mission, values, service philosophy).
 - c. Assign peer mentors to support new hires in their first 30–60 days.
5. Evaluate compensation and organizational structure
 - a. Conduct a full compensation and benefits review against industry benchmarks.
 - b. Identify any pay disparities and address equity concerns.
 - c. Reassess organizational chart to ensure clarity of roles and reporting lines.

CSF5: Operations & Membership Experience

Area of Focus: Use data and feedback to improve the member and employee experience, with emphasis on F&B, programs, service delivery, and standards.

Who: General Manager/COO, Department Heads, Member Experience Committee, Communications Manager, F&B Leadership Team

Measureable Metrics:

- Member satisfaction ratings improve year-over-year in targeted areas (F&B, programming, service)
- Structured feedback mechanisms implemented and reviewed monthly
- Key Performance Indicators (KPIs) developed and reported for core departments
- Member usage data informs at least two new or refined offerings annually
- Service standards adopted and incorporated into training club-wide

Key Objectives

1. Establish structured feedback systems
 - a. Implement digital and in-person tools to collect member and employee feedback.
 - b. Introduce quick polls, QR codes, or tablets for real-time input at key locations.
 - c. Review feedback monthly and share actionable insights with department heads.
2. Develop and monitor KPIs for service and amenities
 - a. Identify 3–5 KPIs per department (e.g., F&B ticket times, response times, usage rates).
 - b. Build dashboards to track performance and identify trends.
 - c. Review KPIs quarterly with leadership and adjust operational goals as needed.
3. Enhance the Food & Beverage experience
 - a. Review and refresh menus quarterly to reflect member preferences and dietary trends.
 - b. Conduct consistency audits on food quality and service delivery.
 - c. Offer tasting panels or informal feedback nights for member engagement.
4. Expand and evaluate member programming
 - a. Conduct annual review of participation rates and satisfaction for all events.
 - b. Align offerings with demographics, seasonality, and usage patterns.
 - c. Introduce pilot programs to test new formats or interest areas.
5. Strengthen service standards and training
 - a. Develop Club-wide expectations for appearance, communication, and professionalism.
 - b. Integrate standards into onboarding, seasonal training, and evaluations.



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Strategic Plan Workbook

2025

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Vision

To be the favorite year-round place for family memories, adventures, and lasting traditions.

Mission

Sunny Hills Golf Club's mission is to unite multi-generational families through exceptional golf experiences and top tier-facilities, fostering a community where family traditions and the love of the game thrive.

Pledge

Preserve the lakes, streams, and woodlands in an environmentally responsible manner.

Strive to provide exceptional member services and facilities.

Promote a spirit of mutual respect among members and staff.

Operate openly, transparently, and fiscally responsible.

Provide the framework that supports member participation in the governance of the community.

Provide opportunities for each member's voice to be considered.

Stay ahead of the curve, actively listening to and learning from our members to continually adapt and meet member needs and desires.

Core Values

Community: Fostering a sense of belonging with a variety of activities, amenities, and events for all ages.

Family-Centric: Focused on prioritizing multi-generational connections through indoor and outdoor recreational and social activities.

Responsibility: Preserving and protecting the lakes, streams, and woodlands, ensuring they are cherished for generations to come.

Peace of Mind: Where families can relax, children can explore providing an ambiance of trust and confidence.

Commitment to Excellence: Providing unique, memorable, and personal experiences with a relentless focus on excellence ensuring unparalleled service for our valued members and their guests.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



For accountability and progress reporting:

Name/Who = Only one person can be held accountable, and they can enlist the help of others but **one person** has to own each task and/or objective.

Date/When = A specific deadline date that this listed task or milestone will be reached. If there are sub tasks to be assigned, add lines and go deeper into the outline.

- I) Critical Success Factor
 - A. Key Objective
 - i. Action Items
 - a. Sub Action items/To do's
 - 1. Sub Action items/To do's

Status = On Track Highlight **Green**, Off Track Highlight **Red**, Completed Highlight **Blue**

Name	Date	On Track/Off Track/Complete	FOR EXAMPLE
Who	When	Status	
Brian P	10/15/2024	On Track	A. Q4 2024: Define what membership success looks like. i. Establish ideal number of FTE (currently contemplated at 1060) up from 1010/1020 in recent history. ii. Additional net 40 FTE's = \$500,000 in Additional Operating Revenue and to fund Capital
Seth W	10/1/2024	Off Track	
		Complete	
			B. Q1 2025: Identify gaps between current status and desired future, factor in headwinds and low hanging fruit to solve the gap.
		On Track	i. Identify normal annual attrition (4-5% annual death, relocation, financial, aging)
John B	3/31/2025	Complete	ii. Identify Members over age 75/90+ as "at risk" (in the next 5 years).
John B	3/31/2025	Off Track	a. Bad reports, requires further research, 2 week delay
John B	3/31/2025	Complete	iii. Research trends in attrition on who is leaving - relocation, age, family changes, financial, etc.
John B	3/31/2025	On Track	iv. Look at children of Members for legacy upgrade program, potentially converting legacy Members at an earlier age.
		Complete	v. Reinstatement program for Members who may have resigned in the past 1 years and may consider returning.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name Who	Date When	On Task/Off Task/Complete Status	Critical Success Factor #1: Capital - Repairs and Maintenance: Provide a comprehensive approach to managing regular capital (repairs and maintenance) by ensuring that assets are adequately maintained and funded, addressing potential shortfalls, and considering long-term projects. Revisit and update the capital reserve study.
			Who:
			A. Q3 2024: Revisit and update capital reserve study by and update capital maintenance plan/budget.
	7/15/24		i. Confirm that all assets are accounted for in the reserve study.
	8/1/24		a. Assign department heads to review their section of the study.
	9/1/24		ii. Create a working spreadsheet to rank items, budget items and estimate year needed (10 year focus).
	10/01/24		iii. Work with finance committee to review best plan based on needs and budget.
	11/1/24		iv. Educate each committee of 10-year long capital replacement plan.
	9/1/24		v. Review all maintenance expenses in the operational budget.
	8/1/24		a. Identify if items should be replaced, instead of being repaired.
	7/1/24		b. Investigate Yardly or other property management software.
	8/1/24		c. Identify which capital items have been deferred in recent years.
			B. Q3 Review funding plan for the repairs/maintenance of existing assets and operational projects over the next 5 - 10 years.
	8/1/24		i. Identify any upcoming funding shortfalls.
	8/1/24		ii. Work with BOT, BOG to develop a plan addressing funding shortfalls.
	8/1/24		a. Develop communications about potential changes in HOA fees for funding shortfalls.
	10/1/24		ii. Develop a separate funding plan for additional capital projects.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name Who	Date When	On Task/Off Task/Complete Status	Critical Success Factor #2: Cohesive Master Campus Plan (Update Horizon Plan): Planning and coordinating various major capital projects within the context of the master campus plan, taking into account member input, financial considerations, and the evolving needs of the club and community. <i>Who:</i>
	5/31/24		A. Q2 2024: Finalize 3-5 Year Capital Plan with new and updated facilities as part of the newly revised Horizon and Getway plans including new Clubhouse, Marina, admin offices, employee housing.
	5/31/24		i. Sunny Hills Golf Clubhouse.
	5/31/24		a. Operational and storage considerations.
	5/31/24		b. Review kitchen equipment listing - ensure proper equipment is designated.
	5/31/24		ii. Additional parking at the clubhouse and beaches.
	6/15/24		iii. Beaches.
	6/15/24		a. Discuss upgrades to services and overall amenities.
	6/15/24		iv. Sunny Hill Golf Club project.
	6/15/24		a. Account for an increase in operational expenses.
	6/15/24		v. Pickleball Expansion.
	6/15/24		a. Review usage data from Pinecrest to predict number of courts needed.
	6/15/24		vi. Employee Housing.
	6/15/24		a. Verify number of units needed for increase in membership growth.
	6/15/24		vii. Upgraded technology - wi-fi and cell coverage.
	6/15/24		a. Review dead areas and develop a plan to increase overall coverage.
	6/15/24		viii. Define and develop a comprehensive campus plan for all projects under consideration
			a. Examine new trends, demographics, security, and membership size.
			b. Investigate continuing use of Pinecrest while under construction.
			1) Identify assets in the reserve study that will be replaced.
			2) Develop an analysis of increased operating expenses due to new projects.
			c. Hold town halls on progress and to receive feedback.
	6/15/24		ix. Define and map-out funding solutions including a mix of debt and assessment with payment plans and additional fun
			B. Q2 2024: Define and develop a comprehensive campus plan for all projects under consideration.
	5/31/24		i. Complete this phasing out the final projects for years 1-5 and what is expected to happen each year following the original project.
			C. Q 2&3 2024: Begin Member communication and education roll-out for the updated Horizon and Gateway Project
	5/30/24		i. Engage SCS to begin the education and communication strategy with LNC Management and BOT and other appropriate committees to engage in the conversation, listen, educate and inform through a series of emails, videos, FAQ's, town halls, pulse surveys, and brochures leading up to the vote likely in September/October.
			Begin virtual work with committees and SCS in April and finalize strategy, cadence, schedule, renderings, other
	6/15/24		a. assets by May 15th
	6/30/24		b. Launch initial communication campaign in June, depending on renderings and detail availability on permits, etc. Initial communications and information to roll out, focus groups, and initial pulse survey to gauge support, questions, concerns, and gaps in education and support to guide next wave of communications
	8/31/24		c. July/August - Follow-up education, town hall, etc.
	10/1/24		d. September/October Present final plans and documents leading up to vote.
	10/15/24		ii. Member vote to approve final version of plan.
			D. Q4 2024: Identify key projects to enhance current assets or new aspirational projects.
	9/1/24		i. Bike and walking paths.
	9/1/24		ii. Additional indoor facilities.
	9/1/24		iii. Purchase of land.
	9/1/24		iv. Continued review and improvement of parking options.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name Who	Date When	On Task/Off Task/Complete Status	Critical Success Factor #3: Leadership and Governance: Review and update how to improve the clarity of roles, communication, accountability, and adherence to the rules and regulations within the Club and leverage the internal talent of over 200 committee volunteers. Who:
			A. Q2&3 2024: Develop/clarify clear roles and responsibilities for the Board of Trustees, Board of Governors, Committees, and Management.
	7/1/24		i. Develop a clear matrix for roles and responsibilities
	8/1/24		a. Implement RASCI matrix to clarify the defined roles & responsibilities of BOT, BOG, HOAs BOD, Management and Committees. b. Create a visual Organizational Chart that shows the relationships of the stakeholders within the organization.
			B. Q2, 3&4 2024: Provide better transparency and accountability for operational leadership and governance with membership.
	9/1/24		i. Communicate RASCI chart and organizational charts with Membership at Annual meeting.
	6/1/24		ii. Develop enhanced communications from volunteer leadership and management. a. Improved communications through email, video, board minutes, committee reports, etc. available for people to review on the private member portal.
			C. Q2,3&4 2024: Develop a communication strategy for the BOT, BOG, and Management to better communicate with Members and Homeowners about Club initiatives and progress on a regular cadence.
	6/1/24		i. Develop a monthly communication on key actions, opportunities, projects, etc.
	6/1/24		a. Utilize Website, newsletter, and app to increase the level of frequency of communications.
			D. Q2 2024: Establish an enhanced process for rules and regulations enforcement.
	6/1/24		i. Short-term rental/guest/special membership - updated orientation and onboarding.
	6/15/24		a. Work with HOA's to develop new welcome video and other collaterals.
	6/15/24		ii. Define how Member discipline issues are being handled.
	6/15/24		a. Document the overall process and communicate to staff.
	6/15/24		b. Review any special considerations for Member children working in the operations.
	6/1/24		iii. Develop communication strategy for educating Members about the rules.
	6/1/24		a. Develop top rules reminders communication before season begins.
			E. Q2&3 2024: Revise and implement updated new Member orientation.
	6/1/24		i. Develop and provide personal touch opportunities in the process.
	7/1/24		a. Update current process with information concerning the Horizon Plan.
	6/1/24		b. Develop new Member functions to help them become connected to the community.
	6/1/24		c. Review the communication process for informing the membership and staff of the new Members.
			F. Q3&4 2024: Review and update BOG and committee orientation.
	9/1/24		i. Update all orientation materials for BOG and committees.
	9/15/24		a. Include Horizon Plan, Financial overview, Rules process, and RASCI chart.
			ii. Integrate new mission, vision, vales/pledge and brand elements.
	10/1/24		iii. Create a charter for each committee.
	10/1/24		a. Identify size and make up of each committee.
	10/1/24		b. Develop overall rules and gudielines for each committee.
			G. Q2 2024: Review an update current Bylaws.
	6/1/24		i. Review spending limitations and develop recommendations.
	6/1/24		ii. Review temporary and special family membership categories.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name Who	Date When	On Task/Off Task/Complete Status	Critical Success Factor #4: People Strategy: Improve employee engagement, recruitment, retention, and overall satisfaction within the organization through rewards programs, onboarding improvements, compensation analysis, and ongoing feedback. <i>Who:</i>
			A. Q2 2024: Develop Programs to Attract and retain employees.
	6/1/24		i. Investigate sign-on bonuses, seasonal bonuses, and employee referrals.
	6/15/24		a. Establish levels of bonus for all programs.
	6/15/24		b. Communicate the program to all departments.
	6/1/24		c. Track the effectiveness of all bonus programs.
	9/1/24		d. Investigation of employee college scholarship program .
	10/15/24		e. Expand and develop a welcome page on Indeed.
	10/15/24		1. Develop a new welcome video.
	10/30/24		2. Provide a targeted process for recruiting local employees.
	6/1/24		ii. Review current hiring and recruiting process.
	6/1/24		a. Develop a process for all the departments to have clear communications with HR department.
			B. Q3 2024: Evaluate H2B employee Programs.
	9/1/2024		i. Evaluate 2024 program.
	9/1/2024		a. Review effectiveness of all H2B employees
	10/30/24		b. Revise and update recruiting materials.
	9/1/2024		c. Evaluate the recruiting process for 2024.
	10/30/2024		d. Investigate using PGI, Petrina Group International for 2025 recruiting year.
	10/1/24		ii. Investigate partnerships with private clubs in Florida.
	10/15/24		a. Contact GMs of large clubs in Florida.
	11/15/24		iii. Explore utilizing J1 employees for the 2025 season.
			C. Q2 2024: Institute consistent and authentic employee rewards and recognition programs.
	6/1/24		i. Develop seasonal and yearly programs.
	6/1/24		a. Develop a monthly calendar of events/rewards programs.
	6/1/24		b. Plan Club Wide and departmental employee appreciation events.
	6/1/24		ii. Allocate a defined budget for rewards programs to ensure they are sustainable and effective.
	6/1/24		a. Gather recommendations from all department heads for seasonal and yearly programs.
	6/5/24		b. Budget for weekly, monthly and yearly events.
	6/15/24		iii. Develop a strategy to communicate the success of these programs to the membership and staff.
	6/30/24		a. Hold all-staff meeting to communicate new programs.
	ongoing		b. Communicate to the Management team at team meetings the effectiveness of the program.
	6/30/24		c. Newsletter and app strategy.
			D. Q2 2024: Revise and implement new employee onboarding process.
	6/1/24		i. Analyze how to streamline the onboarding paperwork to reduce the admin. burden and improve efficiency.
	6/1/24		a. Investigate utilizing digital paperwork through a payroll processing company.
	6/1/24		ii. Ensure seamless integration for all employees into their roles.
	6/1/24		a. Develop a Buddy/Mentor relationship for a new employee.
	6/1/24		b. Set small achievable goals during departmental training process.
	6/1/24		c. Develop a specific day for overall employee orientation day.
	6/1/24		1. Develop the frequency of overall orientation days.
	6/1/24		2. Include a tour of facilities, meeting the department heads and culture video.
	6/1/24		iii. Review departmental training programs.
			E. Q3 2024: Competitive analysis of all hourly employees salaries and benefits.
	9/15/24		i. Address any discrepancies or concerns related to compensation to maintain satisfaction and retention.
	9/15/24		ii. Review current organizational chart - roles & responsibilities RACSI chart.
	10/15/24		iii. Provide the updated data for the 2025 budgeting process.
			F. Q2 2024: Perform annual employee satisfaction survey.
	6/15/25		i. Develop and rollout survey to the employees.
	7/15/24		ii. Review the information and data from the survey.
	7/30/24		iii. Develop an action plan to improve the overall employee experience.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name Who	Date When	On Task/Off Task/Complete Status	Critical Success Factor #5: Operations and Member Experience: Utilize data-driven insights to elevate Member and employee satisfaction by providing a vision for F&B operations, developing consistent Member feedback systems, and maintaining consistent KPIs. <i>Who:</i>
			A. Q3 2024: Evaluate and improve low-performing services and amenities.
	9/1/24		i. Utilize data from the survey to create an action plan.
	9/30/24		a. Develop plan for possible changes to operational hours for 2025.
	10/15/24		b. Communicate and promote any changes to operational hours.
	7/1/24		ii. Propose possible changes for updated and new facilities in the Horizon Plan.
			B. Q2 2024: Develop a vision for the overall food & beverage department.
	6/1/24		i. Review comments from Members over the past season.
	6/15/24		a. Analyze the trends and make adjustments to operations.
	6/1/24		ii. Address menu variety and food consistency issues.
	6/15/24		iii. Investigate new trends and the local market.
	7/1/24		iv. Develop different identities for new F&B outlets in the new clubhouse, beaches and new marina complex.
			C. Q2 2024: Develop KPIs to measure overall success for all services and amenities.
	6/1/24		i. Ensure all Management team members understand the monthly cost analysis.
			D. Q2 2024: Develop and improve Member and employee feedback systems.
	6/1/24		i. Review current feedback systems for effectiveness.
	6/15/24		ii. Investigate electronic and beacon technology for member and employee feedback.
	6/1/24		iii. Review the ability of current CE app.
	6/15/24		a. develop real-time Member quick survey for all departments.
			F. Q2 2024: Propose increase in rates and fees for "extended membership usage".
	6/1/24		i. Special family members, guests, etc. to support their impact on facility demand and wear & tear.
	6/15/24		ii. Communicate any changes to programs and fees.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name Who	Date When	On Task/Off Task/Complete Status	Critical Success Factor #6: Brand Identity and Brand Integration: Clarify the Club's brand identity to understand what the Club is all about, what it stands for, and what to expect from membership. This clarity can attract and retain individuals who align with the Club's values and interests, making them more likely to join and remain Members. <i>Who:</i>
			A. Q 2,3,4 2024: Integrate Brand Identity.
	6/1/24		i. Adopt Updated Mission, Vision and Values from Strat Plan & Brand in 23.
	6/15/24		a. Employee Mission Statement.
	6/15/24		ii. Update all platforms: including but not limited to the website (public & private), email templates, social platforms, and printed materials, to include updated brand voice, communication keys, etc.
	6/1/24		a. Website.
	6/1/24		b. Social Media Channels.
	6/1/24		c. Email Templates.
	6/1/24		d. Newsletter.
	6/1/24		e. Printed materials.
	6/15/24		iii. Integrate Mission, vision, pledge, values, etc, into:
	6/15/24		a. Board and committee orientation.
	6/15/24		b. Employee orientation and onboarding.
	6/15/24		c. Recurring education and engagement with Members and team.
			B. Q4 2024: Look at brand evolution from a design, logo, apparel, sub-branded experiences, etc.
	6/1/24		i. Work with SCS to develop an elevated brand experience through the club areas, particularly as new spaces come online through the Horizon Plan.
	6/30/24		a. For example, looking a new logos and branding for the Beach, Marina, Golf Course, Rec Center, Dining experiences, Racquets, etc.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name	Date	On Task/Off Task/Complete	Critical Success Factor #7: Communications: Foster stronger relationships with Members, staff, and real estate agents, ensuring clarity, engagement, and alignment with their respective needs and expectations.
Who	When	Status	Who:
			A. Q2 2024: Develop a cohesive communication strategy - Members.
	6/1/24		i. Daily, weekly, and monthly communications with various topics and frequency.
	7/1/24		a. Virtual Town hall to set expectations for Horizon Plan.
	6/1/24		ii. Develop strategy for all management communications.
	6/1/24		a. Utilize quick video from department heads and general manager.
	6/1/24		iii. Develop a consistent process for all financial communications.
	6/15/24		a. Review the current process and develop additional communication for the year.
	6/1/24		iv. Develop social media strategy and create a content calendar.
	6/1/24		a. Currently facebook groups are managed by different people. Need to consolidate this process into a cohesive strategy.
			B. Q2 2024: Develop a cohesive communication strategy - Team.
	6/1/24		i. Daily, Weekly and Monthly communications.
	6/15/24		a. Complete and rollout the employee app.
	6/1/24		ii. Schedules and benefits.
	6/1/24		a. Investigate and implement a digital scheduling process.
	6/1/24		iii. Employee appreciation, rewards, and recognition.
	6/15/24		a. Develop consistent communications to promote programs.
			C. Q2 2024: Develop a cohesive communication strategy - Real Estate Agents.
	6/1/24		i. Provide clarity on Club experience and expectations.
	6/15/24		a. Enhance or develop a new Member guide for real estate agents.
	6/15/24		b. Develop an area on website for real estate agents.
	6/1/24		1. Provide a link to rules, bylaws, and HOA covenants.
	6/15/24		ii. Provide education on membership process.
	6/15/24		a. Real estate coffees.



Riverstone Country Club Strategic Plan 2024-2027 - Critical Success Factors and Key Objectives



Name Who	Date When	On Task/Off Task/Complete Status	Critical Success Factor #8: Financial Health: Develop a comprehensive financial strategy that aims to bolster the Club's financial stability, adaptability, and long-term viability, while also ensuring that all membership categories, dues, and policies are aligned with the Club's financial goals and overall mission. <i>Who:</i>
			A. Q3 & Q4 2024: Operating Budget.
	9/15/24		i. Review Departmental utilization analysis.
	10/1/24		a. Propose any changes to 2025 operational hours.
	10/1/24		ii. Budget for a yearly increase in Member families with the strategic goal of 2100 Member families.
	10/15/24		a. Account for increase in payroll and other related costs.
	7/15/24		iii. Review the operational impacts for the Horizon Plan.
	7/15/24		a. Account for potential decrease in F&B revenues due to construction
	7/15/24		b. Review parking lot strategy and potential use of shuttles.
			B. Q3 2024: Seasonal flexibility.
	8/1/24		i. Develop a plan to adjust operations for shoulder seasons.
	9/1/24		ii. Evaluate and communicate new and expanding offerings.
			C. Q2 & Q3 2024: Membership Categories/Dues.
	7/1/24		i. Review dues for all membership categories.
	7/1/24		ii. Review current membership dues classes.
	8/1/24		a. Develop a strategy to eliminate all different categories and membership and develop a single membership for the Club.
	6/1/24		iii. Revise rules for temporary memberships.
	6/1/25		a. Utilize the process that exists in current bylaws for membership approval.
	6/15/24		b. Communicate the process to HOA, membership and real estate agents.
	6/15/24		iv. Review guest policies for all membership categories.
			D. Q2 2024: Capital Planning and Funding - Legacy.
	6/1/24		i. Develop systems to accommodate Legacy Members for assessments.
	6/1/24		ii. Raise awareness and provide avenues for "legacy giving" to the Club.



STRATEGIC CLUB SOLUTIONS



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RIVERSTONE
Country Club

RIVERSTONE COUNTRY CLUB

MEMBER REPORT

2026



STRATEGIC CLUB SOLUTIONS

Prepared in Collaboration With
STRATEGIC CLUB SOLUTIONS



Board President

LINDA SHEPARD



On behalf of the Board of Directors, thank you for your continued support and engagement throughout the strategic planning process. Your participation, whether through surveys, conversations, or simply sharing your perspective, played a vital role in shaping this plan for the future of our Club.

We are especially grateful to our Club's leadership team, committee members, and fellow Board volunteers whose time, insights, and dedication brought this work to life. Their collaboration and commitment have been instrumental in guiding this process with care and purpose.

We also want to acknowledge the contributions of Strategic Club Solutions, whose thoughtful facilitation supported the development of this plan and helped ensure that every step was aligned with our Club's unique values and aspirations.

The following pages reflect the work of many and represent the beginning of a broader conversation. This is not a final destination, but a clear starting point to ensure the long-term strength, stability, and vitality of our Club.

We look forward to the road ahead, and to continued collaboration with you, our valued members.

Linda Shepard

President, Riverstone Country Club Board of Directors



BOARD OF DIRECTORS

- **Linda Shepard**, President
- **James Prescott**, Vice President
- **Charles Benton**, Secretary
- **Michael Harlan**, Treasurer
- **Tara Delaney**
- **Robert Gaines**
- **Elise Morgan**
- **David Tran**
- **Angela Voss**
- **William Zhang**

STRATEGIC PLANNING COMMITTEE

- **Robert Gaines**, Committee Chair
- **Brian Adler**
- **Jessica Chen**
- **Daniel Morales**
- **Ethan Wallace**

DEPARTMENT HEADS

- **Mark Ellison**, General Manager / COO
- **Rachel Kim**, Assistant General Manager
- **John Whitaker**, Golf Course Superintendent
- **Thomas Rivera**, Director of Golf
- **Lisa Patel**, Controller
- **Brian Stone**, Executive Chef



STRATEGIC PLANNING PROCESS



STEP 1

Initial Site Visit and Stakeholder Interviews with Board, Committee, and Managers
January 1–10, 2025



STEP 2

Virtual Focus Groups
January 10–16, 2025



STEP 3

Survey Development and Deployment
January 17–February 28, 2025



STEP 4

Survey Analysis and Review
March 1–17, 2025



STEP 5

Pre-Retreat Data Sharing and Questionnaire
March 21, 2025



STEP 6

Board Retreat to Develop Strategic Plan
March 30, 2025



STEP 7

Board Approves Plan
April 13, 2025



STEP 8

Management Implementation Retreat
April 24, 2025



MISSION

At Riverstone Country Club, we are dedicated to providing an exceptional private club experience rooted in natural beauty, personalized service, and a welcoming community. Through outstanding facilities, thoughtful programming, and a commitment to excellence, we aim to enrich the lives of our members, their families, and guests, today and for generations to come.



VISION

Riverstone Country Club will be recognized as a premier private club where natural surroundings, elevated experiences, and a strong sense of belonging come together. We strive to be a forward-thinking community that honors tradition, fosters connection, and continually enhances the value of membership through innovation, stewardship, and excellence in every detail.



VALUES

Excellence – We pursue the highest standards in service, facilities, and member experiences—striving for quality in every interaction and detail.

Integrity – We lead with honesty, respect, and professionalism—building trust and upholding our commitment to doing what’s right.

Stewardship – We honor and preserve our natural surroundings and club resources through thoughtful planning, responsible management, and long-term vision.

Community – We foster a welcoming, inclusive culture where members, guests, and staff feel connected, valued, and engaged in shared traditions and meaningful relationships.

Innovation – We embrace forward-thinking ideas and continuous improvement to enhance the member experience, adapt to changing needs, and position the Club for long-term relevance.

FOCUS GROUPS

Strategic Club Solutions conducted eight focus groups with Riverstone Country Club members, board members, and club leaders between November 1–10, 2024. These sessions offered a candid look into how members experience the Club today and what improvements they hope to see in the future. Feedback was gathered across all departments and amenities, offering a well-rounded perspective on Riverstone’s strengths, gaps, and potential.

Overall, members expressed deep appreciation for the Club’s setting, community, and breadth of amenities. They also voiced clear expectations for a higher level of consistency, service, and communication. This summary reflects the most common and actionable themes that emerged from those conversations and will be used to help guide future planning and decision-making.

MEMBER FOCUS GROUP HIGHLIGHTS

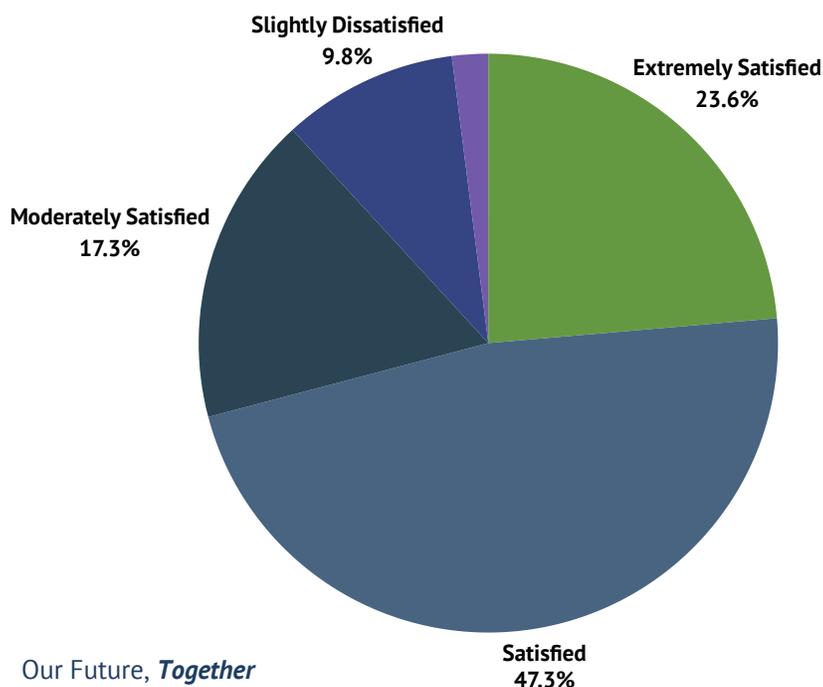
- The golf course is widely praised and remains a core reason for joining.
- Members value the full range of amenities but see inconsistent quality across departments.
- Dining is a frequent pain point, with calls for better variety, execution, and timeliness.
- There is strong interest in modernizing the clubhouse and locker room facilities.
- Family-friendly culture is a strength, with members asking for expanded youth programming.
- Communication from leadership is seen as reactive; members want more visibility and follow-through.
- Members want more innovative, diverse social events to better engage the community.

MEMBER SURVEY RESULTS

In February 2025, Riverstone Country Club invited members to participate in a comprehensive survey to guide future planning. With a 57.9% response rate, the results reflect strong engagement and offer critical insight into what members value and where improvement is needed. This feedback has shaped key priorities and will continue to inform decisions around capital planning, services, and the overall member experience.

SURVEY RESPONSE OVERVIEW

- 742 completed surveys representing 72.3% of member households.
- 59.6% of members visit the Club multiple times per week.
- Golf is the most valued aspect of membership, followed by social connections and proximity to home.
- 39.4% of respondents are Family Golf members; 32.7% are Single Golf members.
- 64.9% support online reservations for Sunset Dining Room; 21.1% remain unsure.
- Food quality, menu variety, and service consistency were the most cited concerns in dining feedback.
- Members desire updated, modern locker rooms and better fitness amenities.



Our Future, *Together*

OVERALL MEMBER SATISFACTION

“

Riverstone has exceeded our expectations. Great people, beautiful facilities, and a real sense of community throughout the Club.

– Member Survey Comment

NET PROMOTER SCORE (NPS)

The Net Promoter Score (NPS) measures Member Loyalty and satisfaction by gauging how likely customers are to recommend a company's products or services. It's calculated by subtracting the percentage of Detractors (0-6) from the percentage of Promoters (9-10). Passives (7-8) are satisfied but not enthusiastic enough to be Promoters, and their responses are not included in the NPS calculation.

The NPS score is calculated by taking the percentage of Promoters and subtracting the percentage of Detractors.

A higher NPS score indicates greater customer loyalty and satisfaction. Generally, a score over 0 is considered good, and a score over 50 is considered above average. Scores of 70 or higher are considered exceptional.

When looking at the NPS by Member Tenure and Member Type, it highlights areas of opportunity to improve. Overall, your NPS scores are above 30, which is considered good by NPS standards, but still room for improvement.

The Benchmark for good in Private Clubs is 39, but exceptional is above 68. While many groups within these results have an NPS above 40, it's essential to note which groups ranked higher and lower to identify at-risk and underserved demographics within the membership effectively. The graph also breaks down the percentage of respondents that each group represents based on the survey results.

What type of membership do you have?

How likely are you to recommend membership at Riverstone Country Club to someone in the next 12 months?

	Family Golf	Non-Resident Family Golf	Single Golf	Non-Resident Single Golf	Social	Non-Resident Social	Honorary
0	1	0	2	0	1	0	0
1	0	0	0	0	0	0	0
2	1	0	0	0	0	0	1
3	2	1	2	0	0	1	0
4	1	0	3	1	0	0	0
5	3	1	5	0	2	0	0
6	6	1	4	2	0	0	0
7	15	1	13	3	2	0	1
8	24	6	24	0	9	1	2
9	22	2	14	1	7	0	1
10	44	9	32	7	15	2	3
TOTAL	119	21	99	14	36	4	8
0-6	11.8%	14.3%	16.2%	21.4%	8.3%	25.0%	12.5%
7-8	32.8%	33.3%	37.4%	21.4%	30.6%	25.0%	37.5%
9-10	55.5%	52.4%	46.5%	57.1%	61.1%	50.0%	50.0%
NPS	44	38	30	36	53	25	38
% Respondents	39.5%	7.0%	32.9%	4.7%	12.0%	1.3%	2.7%

How long have you been a member of Riverstone Country Club?

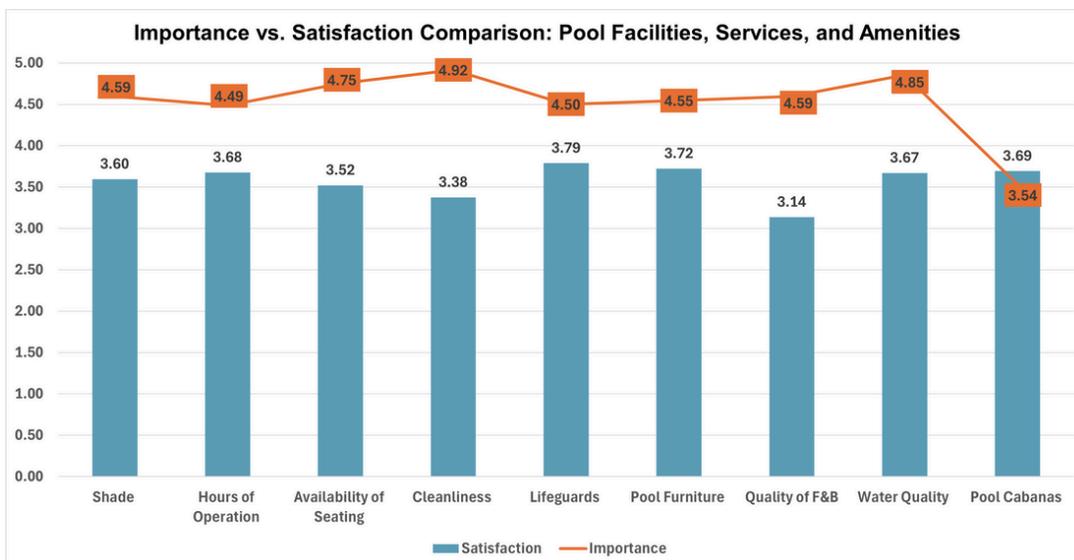
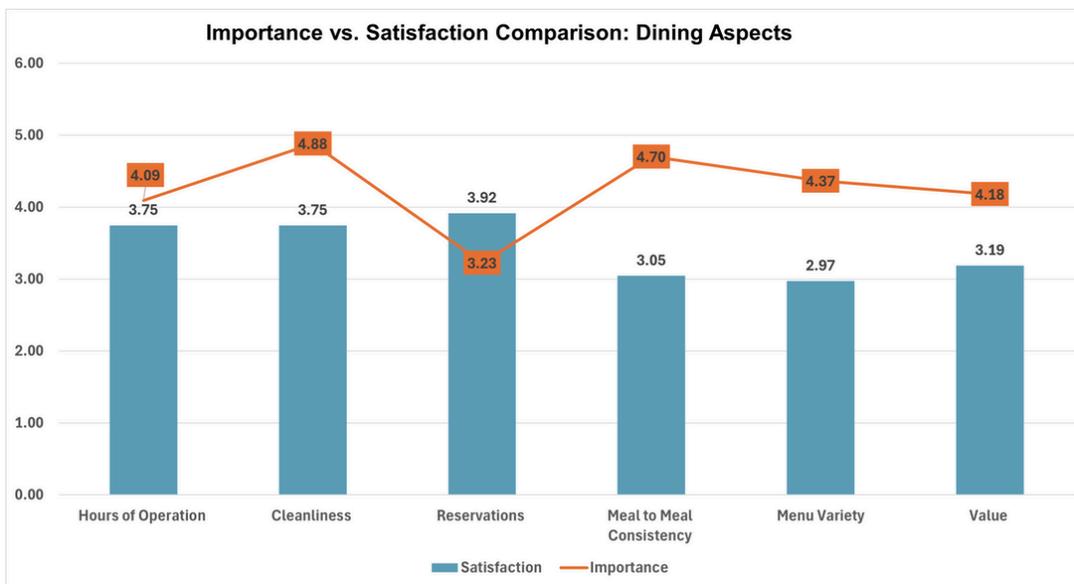
How likely are you to recommend membership at Glens Falls Country Club to someone in the next 12 months?

	Less than 1 year	2-3 years	4-6 years	7-10 years	11-15 years	16-20 years	More than 20 years
0	0	0	1	0	1	1	1
1	0	0	0	0	0	0	0
2	0	0	0	0	1	0	1
3	0	1	0	1	2	1	1
4	0	1	1	0	1	1	1
5	0	1	3	2	0	0	4
6	0	1	3	2	2	0	5
7	1	4	6	4	4	6	9
8	5	6	15	9	6	6	19
9	2	6	10	8	5	7	9
10	9	13	26	16	7	8	33
TOTAL	17	33	65	42	29	30	83
0-6	0.0%	12.1%	12.3%	11.9%	24.1%	10.0%	15.7%
7-8	35.3%	30.3%	32.3%	31.0%	34.5%	40.0%	33.7%
9-10	64.7%	57.6%	55.4%	57.1%	41.4%	50.0%	50.6%
NPS	65	45	43	45	17	40	35
% Respondents	5.7%	11.0%	21.7%	14.0%	9.7%	10.0%	27.8%

KEY AREAS OF FOCUS AND OPPORTUNITY

The two most significant opportunities for improvement from the survey were dining and the pool, as illustrated in the graphs.

The bars indicate satisfaction, and the orange line indicates importance. The areas where gaps exist are the focus of our tactical execution and action plans, which are developed from our strategic plan.



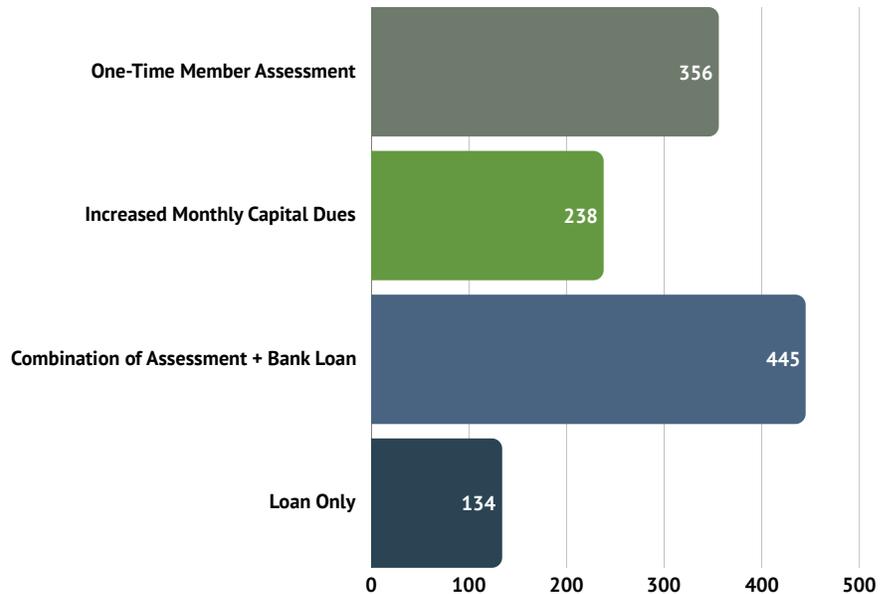
CAPITAL FUNDING

Members were asked which capital funding methods they would most support for future projects, including assessments, capital dues increases, or third-party financing.

“

I'd support a capital project if it's phased, transparent, and I clearly understand how it's being funded.

– Member Survey Comment



Survey feedback revealed strong interest in thoughtful, phased long-range planning that balances ambition with fiscal responsibility. Members support improvements that enhance daily use, particularly in dining, pool, fitness, and locker room areas, but want clarity on scope, timing, and funding. While some members favor one-time assessments, others prefer manageable capital dues. Transparency, visuals, and clear rationale emerged as key to gaining support. This input will shape how the Club prioritizes future projects and communicates progress to maintain trust and engagement.

SURVEY HIGHLIGHTS

- 63% of members support a phased clubhouse remodel over 5–7 years.
- 48% prefer a one-time capital assessment for major projects; 32% favor increased dues.
- 72% say visuals or concept plans are essential before committing to project funding.
- 59% support relocating and expanding the kitchen to improve service across outlets.
- 46% rank locker room upgrades among their top three improvement priorities.
- 67% of respondents favor pool enhancements, including shaded seating and updated furniture.
- 39% cite improved fitness spaces and equipment as a top future need.
- 62% want to prioritize existing deferred maintenance before new expansion.
- 54% are open to temporary course closures for restoration if communicated clearly.

STRATEGIC PLANNING RETREAT

The Strategic Planning Retreat, facilitated by Strategic Club Solutions, was informed by insights gathered through the Pre-Retreat Workbook completed by Club leadership, Board, and committee members. These insights shaped retreat discussions focused on Riverstone's long-term identity, facility priorities, financial model, and governance structure. Key themes included a phased approach to capital investments, elevating food and beverage performance, and improving communication and alignment across leadership. Participants emphasized the importance of transparency, accountability, and defining a consistent member experience.



CRITICAL SUCCESS FACTORS



The Critical Success Factors (CSFs) outlined in this plan were developed through a comprehensive process that included member focus groups, survey feedback, and input from the Strategic Planning Committee. Each CSF is grounded in data and designed to align with Riverstone’s mission, vision, and values. Together, they represent the core areas where focused action will have the greatest long-term impact, providing a strategic framework to guide decisions, prioritize resources, and ensure accountability across all levels of Club leadership. These focus areas are not theoretical, they reflect the real needs, expectations, and aspirations voiced by the Riverstone membership.



Sustaining Club Assets

Protects the Club’s physical assets through proactive planning, structured funding, and disciplined maintenance. Prioritizes capital reinvestment and transparent budgeting to support long-term, data-driven infrastructure decisions.



Future-Focused Campus Planning

Supports a long-range, member-informed campus plan that addresses facility needs with data-driven planning, architectural input, and phased implementation aligned with priorities and budget.



Clarifying Leadership & Governance

Strengthens alignment across Board, management, and committees through clear roles, structured communication, and transparent governance—ensuring decisions are consistent, inclusive, and strategically focused.



People Strategy

Builds a strong employer brand by enhancing culture, retention, and experience through competitive pay, onboarding, recognition, and leadership development—driving service and staff engagement.



Operations & Membership Experience

Uses data and feedback to improve service, programming, and F&B through clear metrics, standards, and systems that align with evolving member expectations.



Brand Identity & Member Engagement

Ensures Riverstone’s brand reflects its values and culture through consistent messaging, modern communication, and engagement strategies that build loyalty and market strength.

NEXT STEPS

STEP 1

Lead with Strategic Focus

Club leadership will prioritize the Critical Success Factors, resist distractions, and ensure all efforts remain aligned with the mission, vision, and long-term goals.

STEP 2

Activate High-Impact Priorities

Early-stage initiatives will launch first, guided by readiness, urgency, and potential to deliver visible progress quickly.

STEP 3

Monitor Progress Consistently

Management will conduct quarterly reviews, tracking progress, reallocating resources, and ensuring key milestones are met without compromising quality or alignment.

STEP 4

Communicate Clearly and Often

Transparent, consistent updates will be shared with members, reinforcing accountability, celebrating progress, and maintaining engagement.

STEP 5

Govern with Support and Continuity

The Board will uphold clarity of roles, empower management execution, and reinforce leadership continuity, ensuring the plan is actively stewarded across future transitions.



As Riverstone Country Club enters this next chapter, the Strategic Plan will serve as a guide, not just for decision-making, but for disciplined, long-term progress. With the plan finalized, attention now shifts to execution. Each initiative will be approached with purpose, measured against the priorities outlined in this document, and paced to balance momentum with stability.

To ensure meaningful results, progress will be monitored through quarterly reviews with management and reported to the Board. These checkpoints allow leadership to make timely adjustments, align resources, and stay responsive to emerging needs. Additionally, an annual progress summary will be shared with the membership, reinforcing transparency and shared accountability.

The Board's role is to govern the plan—not manage day-to-day details—but to maintain strategic focus, empower the management team, and serve as stewards of long-term vision. It will also continue to set the tone for alignment, clarity, and leadership continuity through future transitions.

Success will not be measured by how quickly items are checked off a list, but by how intentionally the Club stays aligned with its mission, vision, and values. This plan reflects a commitment to the future, and to the membership who make that future possible.



STRATEGIC CLUB SOLUTIONS



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670 Mason Ridge Center Dr., Suite 220 • St. Louis, MO 63141

February 19, 2026

CONSULTING SERVICES AGREEMENT
between
UNIVERSITY PARK RECREATION DISTRICT
Sarasota, Florida
and
McMAHON GROUP, INC.
St. Louis, Missouri

McMahon Group will provide the following consulting services for the University Park Recreation Districts' club (hereinafter referred to as "the club"):

BASIC SERVICES

PHASE ONE – FOUNDATION AND PROCESS ALIGNMENT

McMahon Group will meet with the Board, Strategic Planning Committee and executive management team for establishing the groundwork for the entire strategic planning engagement by gathering historical context, reviewing previous member input, and securing unanimous buy-in from leadership through two comprehensive initial strategic planning meetings designed to establish the scope of work, timetable of events, and build consensus among all parties on the planning objectives. The scope of services is as follows:

1. The club will provide McMahon Group with the following:
 - a. Historical Survey and Focus Group Data: All survey instruments, results reports, raw data files, focus group summaries, key themes, and any member feedback from town halls or other engagement efforts conducted over the past 4 years.
 - b. Capital Project Documentation: Complete information on the capital project approved two years ago, including project scope and specifications, architectural plans and renderings, original budgets and actual costs, funding plan and financing structure, member presentation materials (booklets, PowerPoint presentations), voting procedures and results, project timeline (planned vs. actual), post-project evaluation, and member feedback received during and after completion.
 - c. Financial Records: Current operating budgets, capital budgets, reserve studies, membership dues schedules, initiation fee structures, and multi-year financial trends to understand the club's current financial position.
 - d. Governance Documents: Bylaws, standing rules, Board meeting minutes from the past 12 months, committee structures, and any existing strategic documents that guide club operations.
 - e. Membership Information: Current membership counts by category, demographic data, initiation fees, waiting lists (if applicable), resignation trends, and new member patterns.
 - f. Operations Overview: Staff organizational charts, departmental budgets, service standards, and documented operational challenges.
 - g. Facility Information: Any existing master plans, deferred maintenance lists, recent capital improvements, and facility condition assessments.



BASIC SERVICES – PHASE ONE (continued)

2. McMahon Group will conduct two initial strategic planning meetings to establish the scope of work, timetable of events and to build consensus among all parties on the planning objectives. These meetings ensure all stakeholders—the Board, Strategic Planning Committee, and management—are aligned and committed to the planning process before moving forward with survey research and strategic plan development.
 - a. Meeting #1 - Initial Joint Planning Meeting: The initial joint planning meeting serves as the foundation for the entire strategic planning engagement, bringing together all key stakeholders to establish consensus and alignment before work begins. Following meeting #1 McMahon Group will provide the following deliverables:
 - Meeting minutes capturing discussions and decisions;
 - Finalized and accepted strategic planning timeline with specific dates and milestones;
 - Roles and responsibilities matrix for all parties;
 - Member communication framework for keeping the membership involved throughout the process; and
 - Action items list with assignments and deadlines.
 - b. Meeting #2: Survey Review and Approval Meeting: McMahon Group will develop a draft survey based on the key themes and insights developed from the committee, Board leadership, and management, as well as priority issues identified by different stakeholder groups. The core of the meeting will be a detailed, section-by-section review of the draft strategic issues survey developed by McMahon Group. Following meeting #2 McMahon Group will provide the following deliverables:
 - Final Strategic Issues Survey incorporating all approved refinements and ready for distribution;
 - Meeting minutes documenting survey review discussions and decisions;
 - Suggestions on pre-launch member communications;
 - Survey distribution timeline and timetable of events; and
 - Action items list for survey launch preparation.

Foundation and Process Alignment basic services include the man-hours for two (2) site visits by McMahon Group.

McMahon Group’s fee for Phase One, Foundation and Process Alignment, basic services is \$20,000. Reimbursable expenses are in addition to the basic fee.

Note: The initial \$10,000 report and October 2025 site visit with McMahon Group provided to the club is not included in this Phase One scope of services.



BASIC SERVICES – PHASE ONE (continued)

PHASE TWO – STRATEGIC ISSUES SURVEY, MEMBER RESEARCH and COMPETITIVE COMMUNITY CLUB ANALYSIS

McMahon Group will develop, tabulate and interpret a survey testing strategic issues with the members and spouses of the club. The services provided are:

1. McMahon Group will provide the club with a competitive analysis (benchmark data research and analysis) that includes:
 - Identifying HOAs that have country clubs in the immediate Sarasota area that cater to the same demographic and within Florida and the Southeast, both thriving as well as those that are declining; and
 - Identifying what types of amenities or services are essential to membership retention and growth.
2. After review and approval of the Strategic Issues Survey by the club's leadership and management in Phase One, McMahon Group provides the club with an electronic link of the survey questionnaire for the club to email members and spouses, so they are able to complete the survey.
3. The completed survey questionnaires will be tabulated and analyzed by McMahon Group into a formal report. The survey report will include:
 - An Executive Summary;
 - A question-by-question analysis and interpretation of the results;
 - A benchmark of the member survey results against McMahon Group's proprietary database of responses collected from similar clubs and a calculation of the club's McMahon Quality Index (MQI), a proprietary analytical system developed by McMahon Group that compares member experience ratings across satisfaction, value, and other key metrics to provide competitive positioning insights;
 - A comparison of the club's member survey results with the most recent full McMahon survey database;
 - Data tables broken down by member category, age, gender and membership tenure, etc.;
 - Unedited member written comments as approved by the club; and
 - The survey questionnaire itself.
4. A Summary of the Survey Results will be provided for duplication and/or electronic distribution to the membership.
5. McMahon Group will prepare a PowerPoint summary of the results including a consultant's recommended course of action and present it to the leadership.

Per this agreement, McMahon Group will provide the basic services to develop an anonymous survey. McMahon Group will monitor survey length throughout the development process and will recommend areas to streamline or cut back if the survey becomes too lengthy for optimal member engagement and response rates.



BASIC SERVICES – PHASE TWO (continued)

The survey will include four (4) open-ended question at the end of each section (excluding the About You/Demographics section) for members to offer their written comments and suggestions. If, during the survey review process, the club adds any additional open-ended questions that are included in the survey, there will be an additional processing charge of \$500 per question.

The member comments and suggestions in the survey will be transcribed by McMahon and included in the final survey report, separated by each question asked. McMahon Group's analysis is conducted using AI (Artificial Intelligence).

Strategic Issues Survey and Member Research basic services include the man-hours by McMahon Group for one (1) site visit or Zoom meeting at the conclusion of the survey process to explain the final results of the survey to the Board, Strategic Planning Committee and management.

McMahon Group's fee for Phase Two, Strategic Issues Survey and Member Research, basic services is \$39,000. Reimbursable expenses are in addition to the basic fee.

PHASE THREE – DEVELOPING AND FINALIZING THE STRATEGIC PLAN

Utilizing the information developed from Phase One's Foundation and Process Alignment and the results from Phase Two's Strategic Issues Survey and Member Research; the Board members, Strategic Planning Committee and key management personnel will work with McMahon Group on a mutually agreeable date for a planning session to develop the club's strategic plan. The steps in the phase are as follows:

1. Research: McMahon Group will issue a brief strategic issues, pre-retreat survey that is emailed to each member of the Board, Strategic Planning Committee and the participating Executive Management Team members prior to the retreat planning session. This survey will identify key issues for preparing the agenda for the retreat planning day.
2. Planning Session:
 - a. A review and discussion of the Strategic Issues Pre-Retreat Survey results.
 - b. Identification of the club's strengths, weaknesses, opportunities and threats.
 - c. The strategic planning team (Board, Strategic Planning Committee, management and McMahon Group) will identify the club's mission of :
 - Who the club serves (homeowners, outside community members, golfers, diners, etc.),
 - What the club should provide in offerings,
 - What quality level the club should achieve, and
 - What should make the club unique in its marketplace.
 - d. Next, the strategic planning team will identify the primary goals for the club aspects of governance, membership, finances, management, communications, golf, dining, facilities, etc.
 - e. Then the strategic planning team will identify and recommend specific action plans on how to achieve each goal with a prioritized schedule for implementation.



BASIC SERVICES – PHASE THREE (continued)

It is important to note that the identification of the overall mission, goals and implementation of specific action plans for achieving the club's mission must be reviewed and ultimately approved by the Board. The Board has the ultimate responsibility to approve and implement the strategic plan by assigning existing or new committees/task forces or the management team to work through the implementation details and to recommend the best methods for the club to achieve success. McMahon Group is available to help in advising and executing the specific action plans if needed for additional services.

- f. After the strategic planning day McMahon Group's personnel will assemble the discussion material into the first draft of the Strategic Planning Report. This initial strategic plan draft will be provided to all strategic planning participants for their review and comment. Revisions to the Strategic Plan can be made by telephone conference calls/Zoom meetings until the final report is issued to the Board for approval.
- g. A strategic planning summary is provided by McMahon Group to the club's office for mailing to all members and to post on the club's website.

Developing and Finalizing the Strategic Plan basic services include the man-hours for one (1) site visit for the strategic planning development session and up to two (2) Zoom meetings to review and finalize the strategic plan by McMahon Group.

McMahon Group's fee for Phase Three, Developing and Finalizing the Strategic Plan, basic services is \$35,000. Reimbursable expenses are in addition to the basic fee.

Note: If the club's Board would require any major changes to the Strategic Planning Committee's recommended strategic plan for the club, this additional McMahon Group work would be done as extra services to this agreement and would require club pre-approval.

OPTIONAL PHASE FOUR – BOARD FINALIZATION AND MEMBER PRESENTATION OF STRATEGIC PLAN SERVICES – If the club would want McMahon Group to present the final strategic plan to the membership for its review, then this service would be additional services with a basic fee of \$18,000 and is not included in the basic services fee above for Phase Three.



GENERAL ISSUES

If additional site visits are authorized by the club, they will be invoiced at the rate of \$7,000 per day per McMahon consultant plus any reimbursable expenses.

ADDITIONAL SERVICES (Must be approved in advance by the club.)

If additional work other than visits is required beyond the services listed above, it will be invoiced on an hourly basis at the following rates:

Planning Principal	\$875/hr.
Assistant Planning Manager	\$500/hr.
Survey Consultant	\$425/hr.
Facility Planning Consultant	\$425/hr.
Graphics Consultant	\$325/hr.
CADD Personnel	\$200/hr.
Survey Tabulator	\$200/hr.
Clerical Personnel	\$100/hr.

FEE/EXPENSE PAYMENTS

McMahon Group will invoice on a monthly basis using the percentage of completion as calculated by McMahon Group for the basis of the fee due. All fee and expense invoices are due upon receipt.

An initial retainer of \$4,000 is due with the executed agreement, and it is applicable to the final invoice.

REIMBURSABLE EXPENSES

Reimbursable expenses will be invoiced as follows and these amounts are not included in the basic fee amounts:

- Air fare (coach class).....Actual cost + 10%
- Lodging, meals, rental car and misc. expenses (per person) \$650 per day
- Normal misc. project expenses of copying, postage, etc. until project completion..... \$100 per month
- Printing, delivery charges, computer plotting, business reply postage, photography/slide production, conference call service, computer presentation production.....Actual cost + 10%

Should the state of Florida, the U.S. Federal government or any local municipality enact sales and use tax legislation affecting fees for services of McMahon Group, Inc., these taxes will be treated as reimbursable expenses and are in addition to the basic fees set forth in this agreement.



GENERAL CONDITIONS

McMahon Group, Inc. and the club acknowledge and agree that McMahon Group is being retained to review and recommend options to club issues and methods to improve conditions of the club, but that McMahon Group does not, and cannot guarantee the financial and/or social success of the club, and no liability or responsibility shall inure to McMahon Group, or any of its officers, directors, shareholders, employees, agents, or representatives if the results of McMahon Group's efforts hereunder are not successful or do not meet the club's expectations. In consideration of McMahon Group providing the services to the club described herein, the club covenants and agrees to defend, indemnify and hold harmless McMahon Group, Inc., William P. McMahon, Sr., Glen Selligman, Christian Clerc, and other officers, directors, shareholders, employees, agents and representatives, jointly and severally, from and against any and all actions, claims, costs, damages, demands, expenses and liabilities (including, but not limited to reasonable attorney's fees, court costs, expert witness fees and any amounts paid in settlement of any litigation or controversy) imposed upon, incurred by or asserted against McMahon Group or any of its officers, directors, shareholders, employees, agents and representatives by any third party, including but not limited to club members, employees and vendors, arising directly or indirectly out of McMahon Group's performance of services pursuant to this agreement, excluding only acts or omissions of McMahon Group constituting gross negligence. Furthermore, an error or omission is not a breach of this agreement.

The parties acknowledge and agree that all surveys conducted as part of the services provided under this agreement will be anonymous. McMahon Group will not collect, store, or have access to any personally identifiable information of the respondents. The anonymity of the respondents and the confidentiality of their responses are paramount, and all necessary measures will be taken to ensure that the surveys are conducted and information gathered therein shared in accordance with these principles. McMahon Group will be utilizing the club's survey results in its overall club survey database for maintaining an overall quality rating index to provide the McMahon Quality Index™ scoring system for University Park Recreation District and the overall club industry. University Park Recreation District survey results will not be released to anyone except University Park Recreation District officials and remain confidential except for anonymous inclusion of the results in the overall club survey database, for the benefit of the club and the entire club industry.

The club understands that the McMahon Group's duties are limited to those described in the consulting services agreement and that it is beyond the scope of McMahon Group's engagement to be responsible for investigating, discovering, reporting or remedying defects of any nature with regard to the club's physical premises, including, but not limited to, structural defects, mold, radon gas, pollutants of any nature, soil condition, environmental impairment, improper storage, handling or disposal of hazardous or toxic materials, safety violations, building code violations or any other condition which may result in damage to the club or the club's potential liability to any third person or persons.

In order to promote efficiency and completeness, McMahon Group uses artificial intelligence (AI) to review, compile, and analyze some survey responses. While AI can enhance the efficiency and accuracy of the data analysis process, it is not perfect and may occasionally produce anomalies or inaccuracies, commonly referred to as "hallucinations." The club agrees that McMahon Group shall not be held liable for any such errors or inconsistencies resulting from the use of AI in the data analysis process. While McMahon Group will employ reasonable efforts to ensure the reliability and accuracy of the AI-generated insights, however, it makes no warranty, express or implied, as to the insights' correctness, completeness, or suitability for any particular purpose. The club agrees to exercise its own judgment in its reliance on or



GENERAL CONDITIONS (continued)

use of these AI-generated insights. Furthermore, McMahon Group respects the privacy of all survey respondents and data provided and will ensure that all AI tools it uses adhere to strict data privacy and security standards. However, the club acknowledges that no system is entirely secure, and thus, accepts the inherent risks associated with the use of AI in this data analysis.

If for any reason, whatsoever, any term, covenant or condition of this agreement, or the application thereof to any person or circumstance, is to any extent held or rendered invalid, unenforceable or illegal, then such term, covenant or condition is deemed to be independent of the remainder of the agreement and to be severable and divisible therefrom, and its invalidity, unenforceability or illegality does not affect, impair or invalidate the remainder of the agreement or any part thereof; and continues to be applicable to and enforceable to the fullest extent permitted by law against any person or circumstance other than those as to which it has been held or rendered invalid, unenforceable or illegal.

McMahon Group shall not be in default by reason of any failure in its performance of this contract in accordance with its terms and conditions if such failure arises out of causes beyond the control and without the negligence of McMahon Group. Such causes include, but are not restricted in any way to, acts of God, acts of government, riots, fire, floods, epidemics, quarantine restrictions, strikes or other labor disputes, delays in transportation, freight embargoes, severe weather, acts of the club, acts of civil or military authority, accidents, war, or other circumstances beyond McMahon Group's reasonable control, whether similar or dissimilar to the foregoing.

Limitation of Liability: The parties hereto expressly acknowledge, agree and consent that the maximum liability of McMahon Group and any of its officers, directors, shareholders, employees, agents and representatives pursuant to any cause or action arising out of or related to the agreement shall be limited to fees for basic services paid by the club to McMahon Group for services provided pursuant to this agreement.

University Park Recreation District agrees to hold harmless and waive any claims against McMahon Group, who shall not be liable to them for any direct, indirect, incidental, special, or consequential damages or any damages whatsoever, including but not limited to, damages for loss of profits, goodwill, use, data, or other intangible losses resulting from the content of the survey responses, the disclosure of the survey responses, or the manner in which the survey responses are interpreted or used by University Park Recreation District or any third party.

Furthermore, University Park Recreation District agrees to defend, indemnify, and hold harmless McMahon Group, its officers, directors, employees, agents, and representatives from any claims, damages, liabilities, costs, and expenses (including reasonable attorneys' fees) arising from or related to the collection, use, or disclosure of the survey responses, except to the extent such claims arise from the gross negligence or willful misconduct of McMahon Group.

This liability disclaimer and hold harmless provision shall survive the termination or expiration of this agreement and shall apply to all surveys conducted by McMahon Group as part of the services provided under this agreement.



GENERAL CONDITIONS (continued)

This agreement shall be binding upon and shall inure to the benefit of the parties hereto and their respective legal and personal representatives, voluntary and involuntary successors and permitted assigns.

This agreement may be terminated by either party upon seven (7) days written notice. In the event of such termination by the club, McMahon Group, Inc. shall be compensated for all services performed to termination date, together with reimbursable expenses then due.

This agreement represents the entire agreement between University Park Recreation District and McMahon Group, Inc., and supersedes all prior negotiations, representations or agreements, either written or oral. This agreement may be amended only by written instrument signed by both the club and McMahon Group, Inc. The terms of this agreement are valid for 60 days from the date given on the first page of this document. If the project is not completed within one year of the agreement date, the fees are subject to change by McMahon Group, Inc.

This agreement is accepted by both parties and is governed by the laws of the State of Missouri, and the Court of St. Louis County shall have jurisdiction in the event of a dispute. The work is to proceed immediately.

ACCEPTED:

**UNIVERSITY PARK
RECREATION DISTRICT**
Sarasota, Florida

McMAHON GROUP, INC.
St. Louis, Missouri

President

Date

Martha M. Acker, President



McMahonGroup 
PRIVATE CLUB PLANNERS & CONSULTANTS

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THE SOURCE FOR PRIVATE CLUB EXCELLENCE™

Proposal of Services

University Park Recreation District *Strategic Consulting Services*

February 2026



February 20, 2026

John Fetsick
General Manager - UPRD
University Park Recreation District
7671 The Park Boulevard, University Park, FL 34201
Delivered via electronic mail: Jfetsick@universitypark-fl.com

Proposal of Services: Strategic Consulting Services

John,

We, GGA Partners, USA LLC ("GGA"), appreciate the opportunity to provide professional consulting services as specified in this Request for Proposals to the University Park Recreation District ("UPRD", "University Park" or the "District").

This Proposal of Services ("Proposal") outlines our proposed scope of services, project team, associated fees and costs, as well as suggested timing. We appreciate the opportunity to work more closely with you and the University Park team.

Yours truly,



Michael Gregory
Partner
416-524-0083
michael.gregory@ggapartners.com



Ben Hopkinson
Director
647-629-2364
ben.hopkinson@ggapartners.com



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About GGA

GGA is a highly specialized management consulting firm with deep roots in professional services. We are trusted advisors to many of the world's most successful private clubs, golf courses, resorts, and residential communities. Our global reach and wide-ranging experience allow our team to apply proven best practices and innovative thinking to each client's unique financial, operational and market circumstances. We help clients align strategy, amenities and programming with market potential and stakeholder preferences, to maximize return on investment.

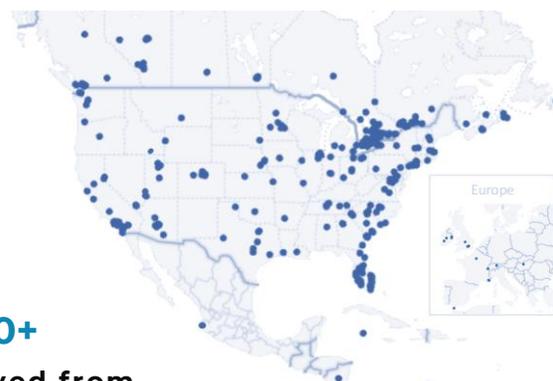
GGA began in 1992 as a specialty practice within KPMG, based in Toronto, Canada. In 2006, the founding partner coordinated the separation of the practice from KPMG, creating the boutique consulting firm now known as GGA Partners. In 2023, GGA joined the ClubWorks, a premiere private club and hospitality-focused professional services platform.

Our services are organized into six distinct categories; however, our capabilities in each area help contribute unique insight and perspective to the particular area of focus for a given assignment, providing additional value and supporting a successful outcome.



GGA Partners is unique in our ability to effectively meld private club management and operational expertise with highly capable professional strategists and business analysts. GGA consists of alumni from: Deloitte, EY, KPMG, PwC, BDO, Scotia Capital, Agentis Capital, Richter Consulting, Pulte Homes, Fairmont Hotels, Marriott Resorts, Congressional CC, and Ocean Reef Club.

We have had the privilege of serving thousands of clients across the globe, providing advisory services to a diverse client base including private clubs of all types, private equity, real estate developers and homebuilders, exclusive communities, elite country clubs, renowned resort properties, top-ranked public golf courses, championship golf venues, large municipal portfolios and a host of royal clubs.



3,500+

Clients Served from

4

Global Offices

TORONTO | WEST PALM BEACH | PHOENIX | DUBLIN



Scope of Services

Based on our understanding, UPRD is in need of a current state review and updated understanding of market forces impacting the future strategy for the community. GGA proposes the following approach and scope of work to meet all requests indicated on the RFP, leading to a final deliverable that provides clear direction and recommendations for future areas of improvement and investment.

Phase 1 - Discovery

1. **Current State Assessment** – GGA issues a detailed information request and will review University Park background material that may provide insight into strategic opportunities and challenges, as well as resident amenity preferences, including but not limited to:
 - Membership - Past and Present
 - Past surveys, questionnaires, studies
 - Capital Project Documentation
 - Financial Records
 - Governance Documents
 - Operations Information
 - Facility Information

2. **Site Visit and Strategic Retreat** – The initial site visit provides an opportunity for a GGA representative to develop an understanding of the overall asset profile of the District and ensure an accurate understanding of operating requirements, successes, opportunities, and challenges.

While onsite, GGA facilitates a strategic planning session with UPRD leadership (Board and/or Planning sub-committee) to align on the strategic priorities, limitations, and opportunities for UPRD. This session will be used to help inform the market research to be conducted by GGA and set the initial framework for the SWOT analysis.

3. **Competitive Market Analysis** – GGA completes a comprehensive analysis of local and regional competitors (as appropriate) to ensure that University Park is well aligned with market comparable communities and positioned as an attractive option for prospective residents. This analysis will include a review of amenities, pricing, programming, and services relative to key competitors, while highlighting recent and planned market changes. The analysis will provide a clear understanding of the current market position while identifying strategic opportunities to enhance UPRD's competitive standing in the future.

Specific areas of focus include:

- Identifying a competitive set of HOAs with country club and/or lifestyle amenities, catering to the same demographics of prospective residents
 - Benchmark comparison of amenity profiles, pricing, real estate metrics and programming
 - Case studies identifying recent changes to the competitive market (i.e. new amenity or capital investment plans)
 - Current and emerging industry trends relevant to UPRD
4. **Deliverable: Research Insights Report** – The culmination of tasks 1-3 described above will support a comprehensive observational report highlighting the key insights most likely to impact long-term strategy and the types of amenities or services essential to membership retention and growth. Depending on the extensiveness of research requested, this report may eclipse 60 pages in length and includes data visualization to support each insight.

Phase 2 – Strategic Recommendations

5. **Strategic Workshop** – GGA facilitates a 2-hour virtual (zoom meeting) strategic workshop for University Park leadership with the intent of aligning on the key takeaways from phase one and begin to collaborate on the SWOT analysis and recommendations. This workshop ties to the phase one retreat, re-evaluating the ‘hypotheses’ that were formed during that phase now that the discovery phase has been completed.
6. **Deliverable: Recommendations Report** – GGA develops a SWOT analysis based upon the phase one insights and the strategic workshop feedback. This analysis supports a detailed list of recommendations and strategic considerations, supported by data rationale, with the overall objective of identifying areas of improvement and investment opportunities for amenities, services and programs essential to membership retention and sustainable growth.

Strategic areas of focus are likely to include, but not be limited to:

- Membership model (Opportunities to restructure the membership model in terms of capacities, pricing and access, based on demographic and usage projections)
- Capital funding model and creative funding opportunities
- Capital investment priorities
- Future vision for the community
- Financial model trade-offs based on alternate future strategic directions (i.e. private vs semi-private golf model)
- Governance best-practices

The report will be structured to clearly propose the foundational elements of a strategic plan for University Park, including vision/mission, SWOT, and recommendations organized into strategic pillars (areas of focus).

7. **Communications Plan** – Following delivery of the Recommendations Report, GGA supports the process for disseminating information to residents and members, through a customized executive summary, video recording, and/or suggested communication templates.

Phase 3 (OPTIONAL) – Strategic Plan and Implementation

Following phase two, GGA remains available to support UPRD with continued advisory support to bring the strategy to life. Potential advisory support services that may align with ‘next steps’ needs for the community include:

8. **Resident/Member Survey** – Some strategic recommendations are likely to benefit from validation and feedback of the residents and members of the community before adoption. GGA can develop a tailored survey designed to capture member feedback that will support strategic assumptions. The results of the survey will validate the future vision of the community and form the basis for key business plan assumptions needed to inform and support an effective strategy.
9. **Strategic Plan Design and Development** – Once the strategic plan content has been approved by leadership, GGA drafts a professionally designed, brochure-style, Strategic Plan that can be socialized with the members. This is typically a 10-page document providing a more appropriate level of detail for members to see and understand the vision and key priorities without getting ‘into the weeds’.

10. **Action Planning** – Once the Strategic Plan is approved, GGA can organize the goals and actions of the plan in an electronic action plan format for strategic monitoring and implementation. GGA collaborates with the Club to agree on timelines, assignees, oversight, key performance indicators and milestones. This platform will provide the framework for collaboration, monitoring and document organization for all progress over the life of the Strategic Plan.

11. **Ongoing Communication Support** – Ultimately, member and resident support for the strategic direction of UPRD and buy-in to the resulting plan is critically important for future success. GGA can stay involved to help develop a communication plan to properly socialize and educate members on all aspects of the strategic planning process. This is especially important when it comes to pursuing any potential strategies or changes that require a vote of the membership, and/or the successful execution of a major capital improvement project. It is essential for members to feel informed and that leadership has been fully transparent throughout the process.

Project Team

Michael Gregory (Managing Director and Partner), Ben Hopkinson (Director) and Murray Blair (Director) will be the main engagement leads for University Park, while leveraging GGA's team of more than 30 industry professionals, as well as our various industry relationships.

Timeline

GGA is prepared to begin the scope of services outlined herein as of March 15th, 2026 and will work with University Park to support the most appropriate timeline possible to meet all required timelines. GGA can complete the scope of services outlined above within 10-12 weeks of receipt of all information requested.

Fees and Costs

Professional Fee

GGA professional fees are based on the time required from our team and their professional hourly rates shown below.

GGA Professional	Hourly Rate
Partner	\$575
Director	\$425
Manager	\$325
Senior Associate	\$250
Associate	\$200

Based on the scope of services outlined herein, the fixed professional fee is \$45,000, which includes the out-of-pocket costs GGA will incur for travel related expenses for a GGA representative to conduct a site visit.

This Proposal will also serve as an ongoing services agreement, under which GGA will execute work above and beyond the scope of services outlined herein, at UPRD's request, in accordance with the time required from professional staff and GGA's hourly rates. GGA will not complete any work above and beyond the

scope of services unless expressly requested and approved in advance by UPRD. For any additional services requested, the time required and associated professional fee will depend on the specific services and scope requested by UPRD.

Payment Terms

To commence this engagement, GGA requires receipt of an executed copy of this Proposal and payment of our standard retainer equal to 50% of estimated professional fees \$22,500. The remaining fees and costs will be invoiced monthly, with the retainer offsetting the first \$22,500 in professional fees.

GGA Standard Terms and Conditions

Confidentiality

GGA acknowledges that all information provided by UPRD, its management, or its representatives, pursuant to this engagement is confidential. GGA agrees that it shall maintain such information in confidence and that such information shall not be used other than in furtherance of the purposes of this engagement, provided that this confidentiality obligation shall not apply to (a) information now in the public domain, (b) information that subsequently becomes public other than through breach of GGA of its obligations hereunder, and (c) information that is required by law to be disclosed. GGA agrees to advise UPRD and its representatives promptly of any requests by third parties for disclosure of any such information. GGA and all of its representatives shall be made aware of and be bound by this provision.

Warranty as to Accuracy of Information

To the best of your knowledge and capabilities, UPRD represents and warrants to GGA, and will ensure, that all information as may be provided to GGA, orally or in writing, in connection with the engagement hereunder will be accurate and complete in all material respects and will not be misleading in any material way and will not omit any fact or information that might reasonably be and actually known to be considered material to the engagement of GGA. UPRD acknowledges and agrees that, in conducting the described scope of work, GGA will be using and relying upon such information (and information available from public sources), and GGA shall be under no obligation to verify independently any information so provided or otherwise obtained by GGA, or to investigate changes in such information subsequent to the information being provided to GGA.

Indemnity

In consideration of GGA accepting this engagement, UPRD hereby agrees to indemnify and hold GGA and/or any affiliated company or partnership (hereinafter referred to collectively as "GGA") and each and every one of the partners, directors, officers and employees of GGA (hereinafter referred to as its "Personnel") harmless from and against any and all expenses, losses, claims, actions, damages or liabilities (including the aggregate amount paid for the reasonable fees and expenses of its counsel that may be incurred in advising with respect to and/or defending any claim that may be made against GGA or any of its Personnel) to which GGA and/or its Personnel may become subject or otherwise involved in any capacity under any statute or common law or otherwise, insofar as such expenses, losses, claims, damages, liabilities or actions arise out of or are based, directly or indirectly, upon the performance of professional services rendered by GGA and its Personnel in connection with this letter, provided, however, that this indemnity shall not apply to the extent that a court of competent jurisdiction in a final judgment that has become non-appealable shall determine that:

- i) GGA or its Personnel have been grossly negligent or dishonest or have committed any fraudulent act or wilful misconduct in the course of such performance; and,

- ii) The expenses, losses, claims, damages or liabilities, as to which indemnification is claimed, were caused by the gross negligence, dishonesty, fraud or wilful misconduct referred to in (i) above.

UPRD will not settle any litigation relating to its engagement of GGA unless such settlement includes an express unconditional and irrevocable release in favour of GGA and any of its Personnel with respect to all claims asserted in such settlement. The indemnity by UPRD provided herein shall be binding upon and inure to the benefit of any successors, assigns, heirs, and personal representatives of UPRD, GGA and any of the Personnel of GGA. The foregoing provisions shall survive the completion of professional services rendered hereunder, until superseded or replaced by agreement of the parties.

GGA shall not be liable to UPRD for any actions, damages, claims, liabilities, costs, expenses, or losses in any way arising out of or relating to the services performed hereunder for an aggregate amount in excess of the fees paid by you to GGA under this engagement.

* * *

Acceptance

John, we appreciate the opportunity to support University Park Recreation District through this strategic consulting engagement. If the foregoing is in accordance with your requirements, please confirm by signing in the space provided below, and return a duly executed copy of this Proposal. Our receipt of a signed Proposal and payment of the retainer invoice (to be issued) will thereupon constitute a binding agreement between University Park Recreation District and GGA USA, LLC.

Yours truly,



Michael Gregory
Partner
416-524-0083
michael.gregory@ggapartners.com

ACCEPTANCE:

Accepted and agreed to as of the _____ day of _____, 2026

University Park Recreation District

Signature: _____

Print Name: _____

Title: _____

Company: _____



3.

Update on member feedback portal (Club Insights)

- Presentation**
- Proposed Agreement**



Core Products & Services

Custom Member Research

Strongly agree
Agree
Disagree
Strongly disagree



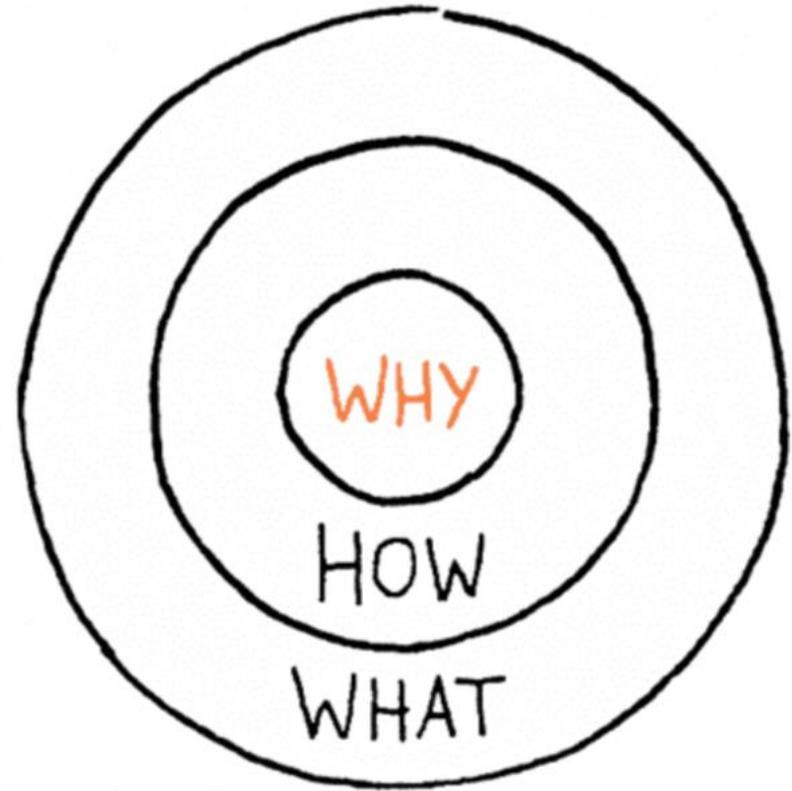
Strategic Planning





Simon Sinek

The Golden Circle

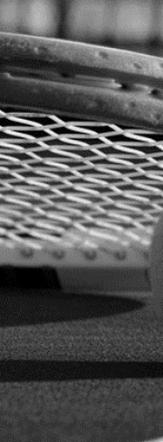




What Is
Your
Why?



Delivering Exceptional Member Experiences





Evolving Expectations
Retaining Staff
Navigating \$\$\$





“Begin with the end in mind”
~Stephen Covey

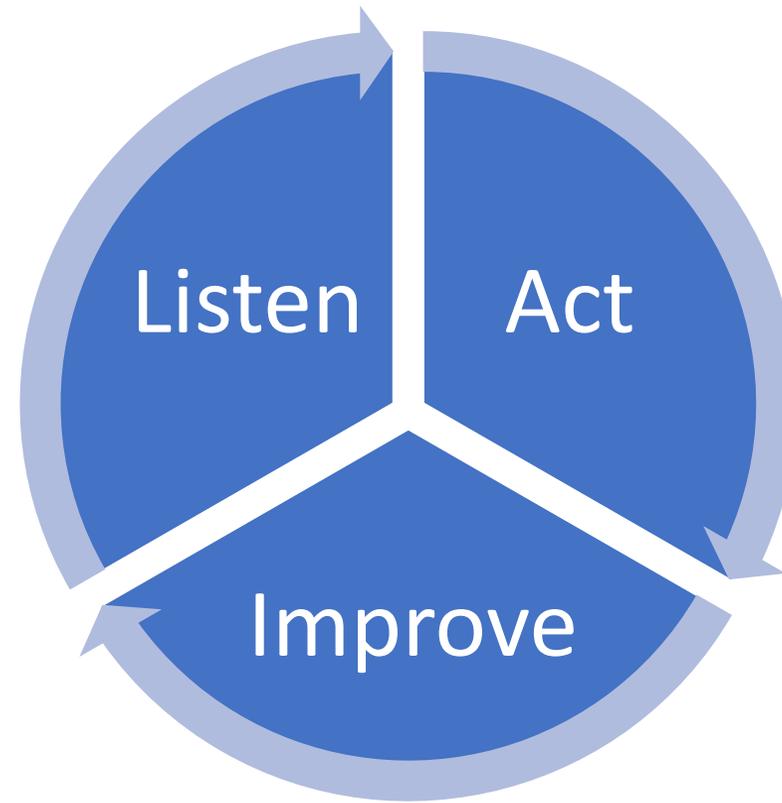
Outcomes

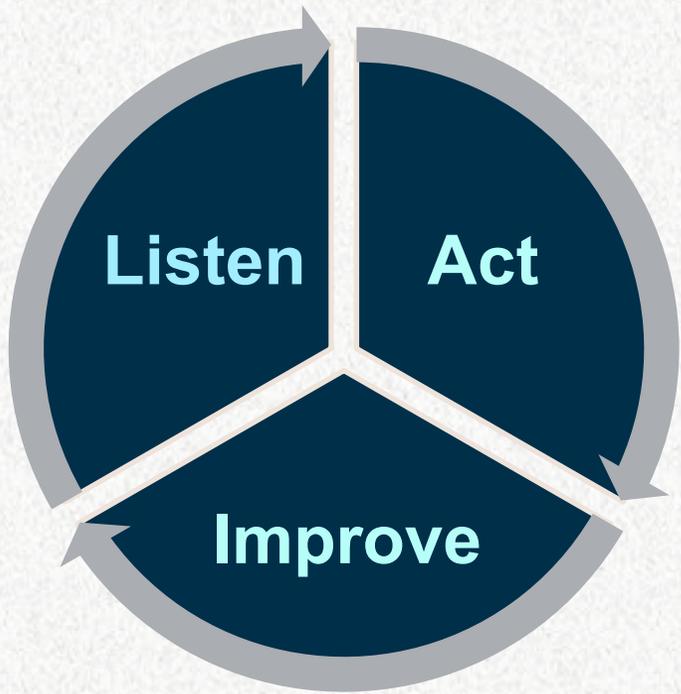
Members feel heard and that their voice matters
Knowledge to guide continuous experience improvement
Boost confidence in Leadership



Keys for an Experience Culture

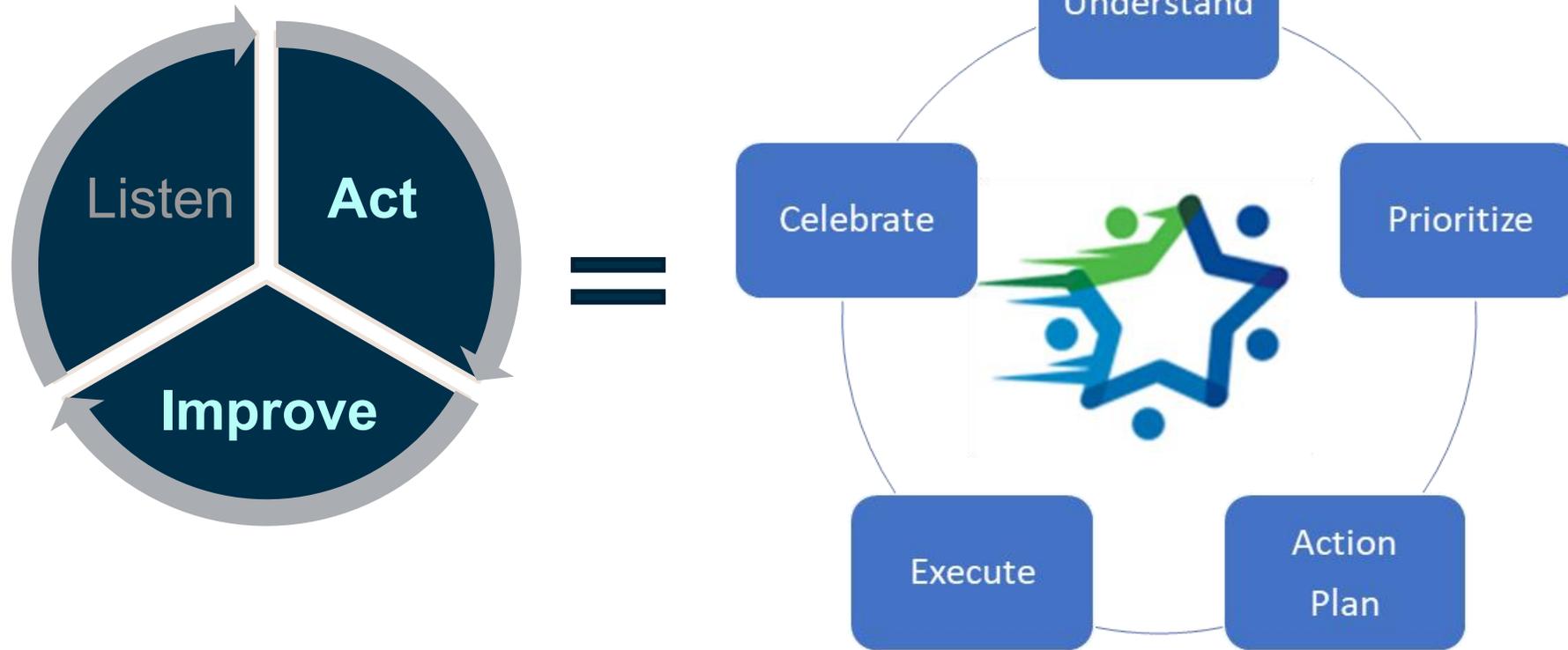
Listen to your members, Act on the information, continuously Improve the member experience





***Transforming
Information to
Action***

Transforming Information to Action



“Without continual growth and progress, such words as improvement, achievement, and success have no meaning” -

~Benjamin Franklin

Summary Dashboard

WHO'S HERE

Members on Premise: 7
Members on Premise with Open Cases: 0

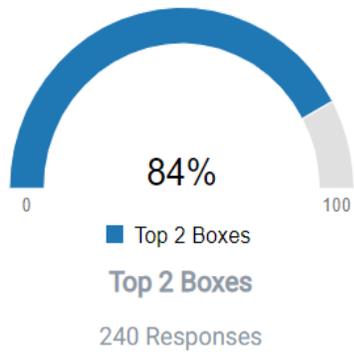


CASES

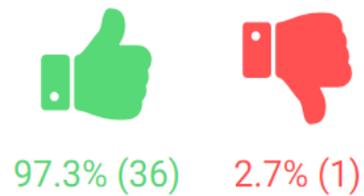
Open cases: 0
Closed cases: 164

PERFORMANCE

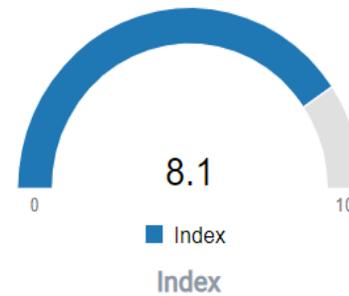
OVERALL SATISFACTION



QUICK PULSE (LAST 30 DAYS)



MEMBER RETENTION INDEX (MRI)



Transforming Information to Action

Filters

- Membership Type
- Gender
- Age
- Tenure

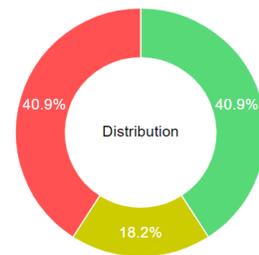
Custom Views

- Top 2 Box, Top Box, Mean
- Distributions
- Table View

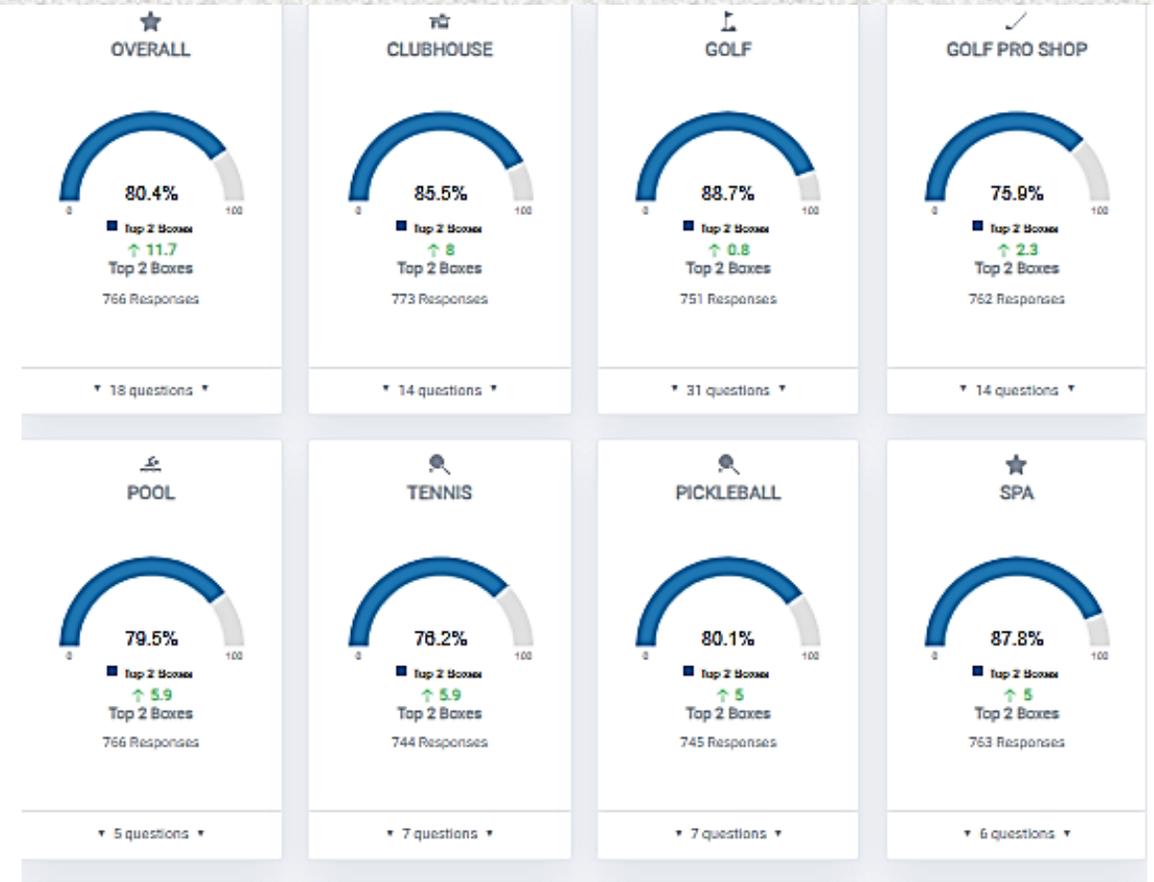
Advanced Comment Analysis

- Positive/Neutral/Negative

WHAT ONE THING WAS KEY TO YOUR GREAT DINING EXPERIENCE?

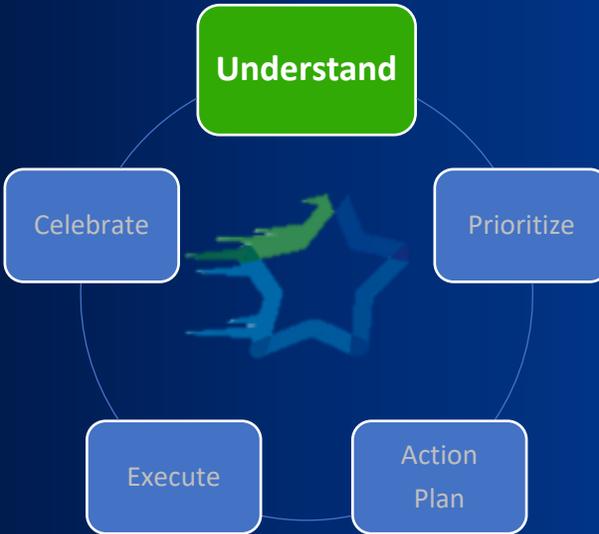


22 Responses



PLEASE EVALUATE YOUR DINING EXPERIENCES IN THE MAIN DINING ROOM / TERRACE PATIO:

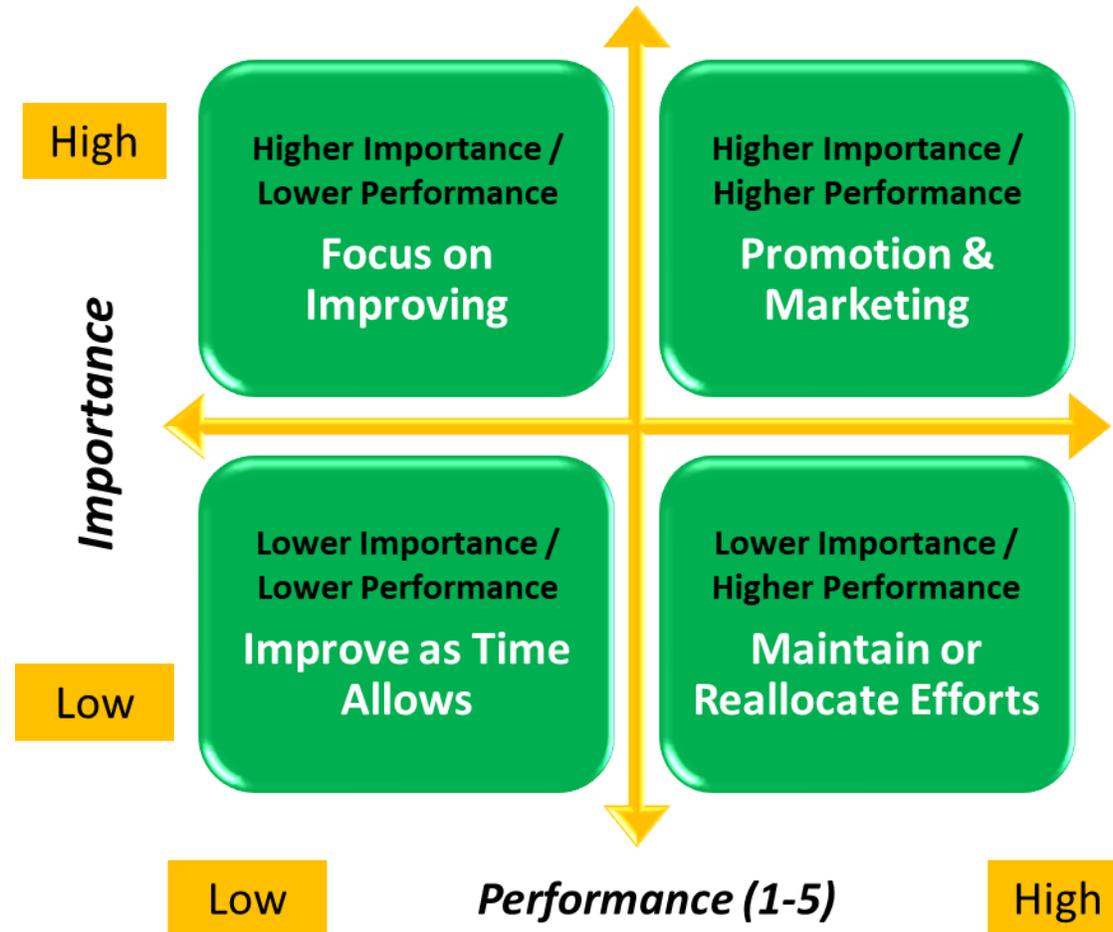
	Distribution						Top 2 Box	Mean	# of Responses
	Very Poor (1)	Poor (2)	Average (3)	Good (4)	Excellent (5)	N/A			
Ambiance - Main Dining Room	2.8%	4.6%	21.5%	49.1%	21.7%	0.3%	71.0%	3.8	391 ↑ 391
Ambiance - Terrace Patio	0.8%	1.8%	11.6%	47.9%	31.7%	6.2%	84.9%	4.2	388 ↑ 388
Promptness of the greeting upon arrival	0.3%	3.1%	11.7%	43%	42%	0%	85.0%	4.2	386 ↑ 386
Mixed drink selection	0%	0.3%	4.2%	31.2%	48.8%	15.6%	94.8%	4.5	385 ↑ 385
Beer selection	0%	1.6%	7.9%	32.8%	26.5%	31.2%	86.3%	4.2	381 ↑ 381
Wine selection	0.3%	2.6%	10.9%	38.5%	34.6%	13%	84.1%	4.2	384 ↑ 384
Quality of the food	2.1%	3.9%	18%	42.4%	33.2%	0.5%	76.0%	4.0	389 ↑ 389
Presentation of the food	1.3%	1.6%	15.9%	44%	37%	0.3%	81.2%	4.1	384 ↑ 384



Transforming Information to Action



Performance Improvement Map



Transforming Information to Action

Formula for Success: Action Planning

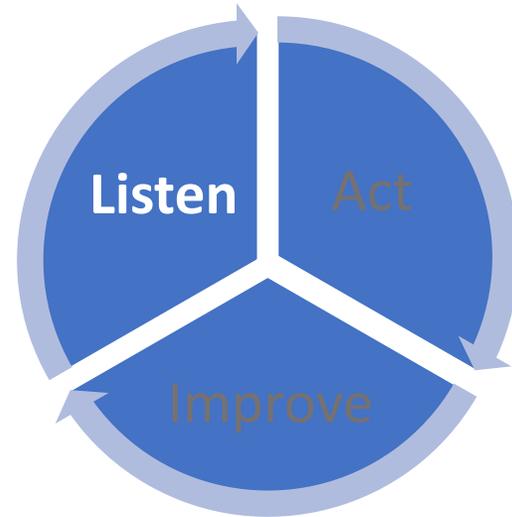
- ✓ **Cross-functional Action Teams** – *varying levels, empowered, autonomous*
- ✓ **Immersion & Focus** – *understand the data, read open-ends, brainstorm*
- ✓ **Plan Development** – *identify action steps with stakeholders, timelines, contingencies*



Specific
Measurable
Achievable
Relevant
Time bound



Listening is an art form...



Why:

All members and spouse have an expectation of being heard

Shows respect and open-mindedness

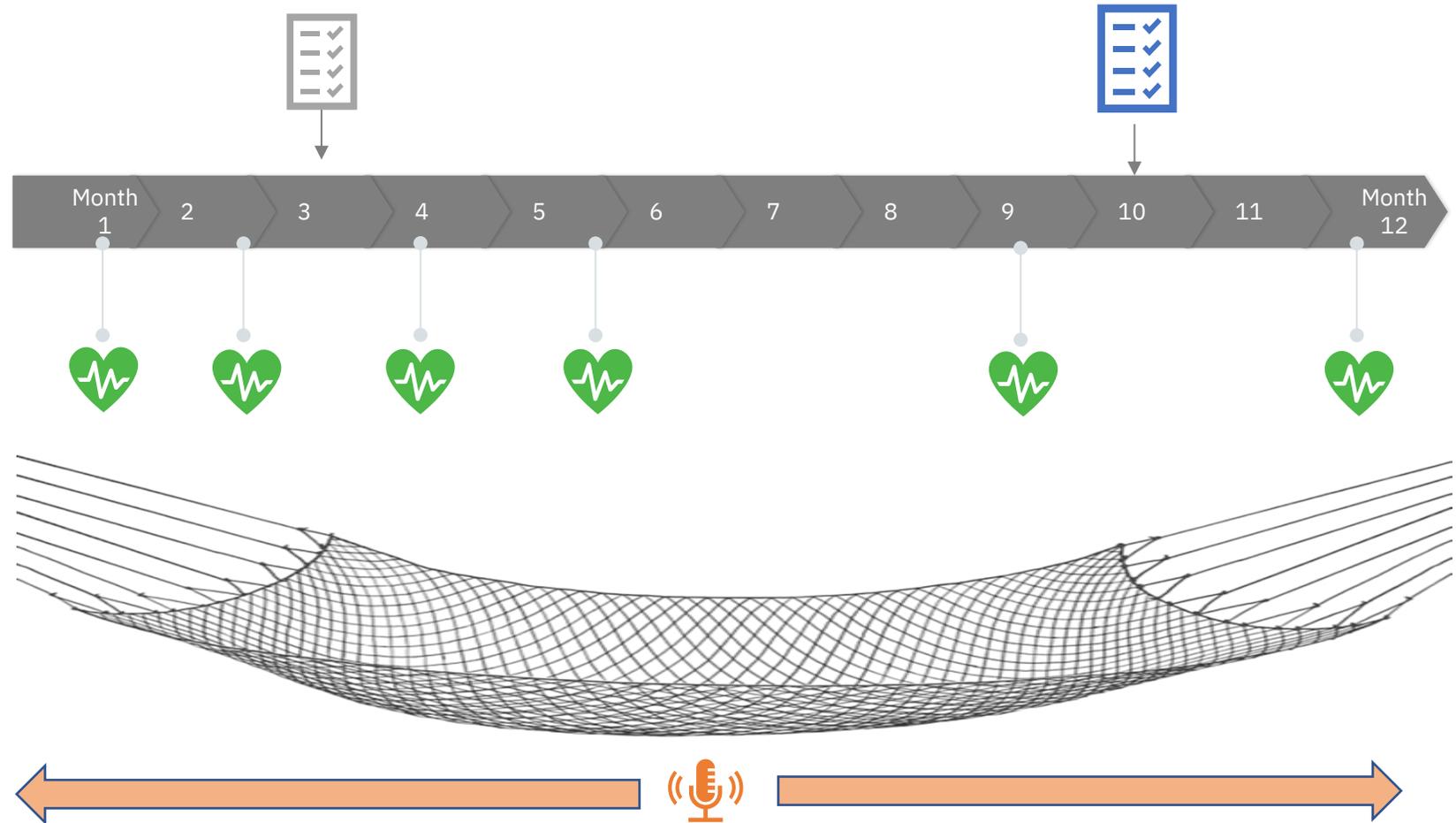
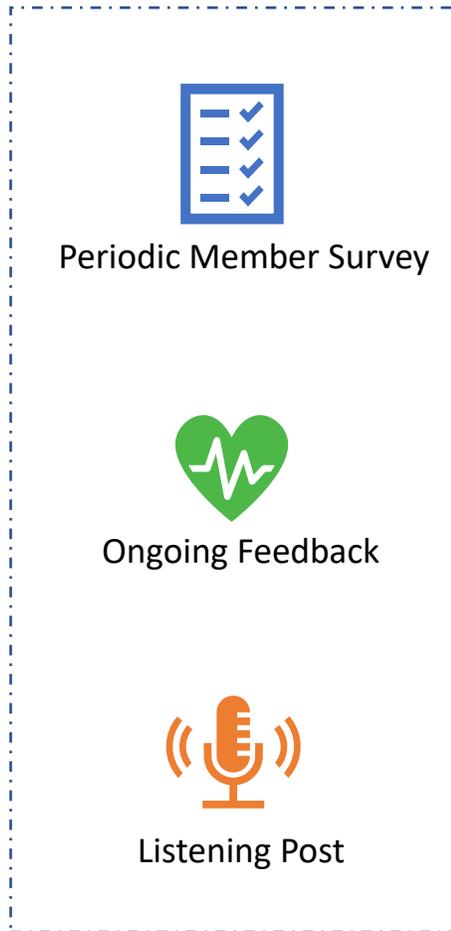
Benefits:

Simple & easy for members to offer suggestions, report issues, or recognize staff

Member confidence their voice matters



Active Listening System

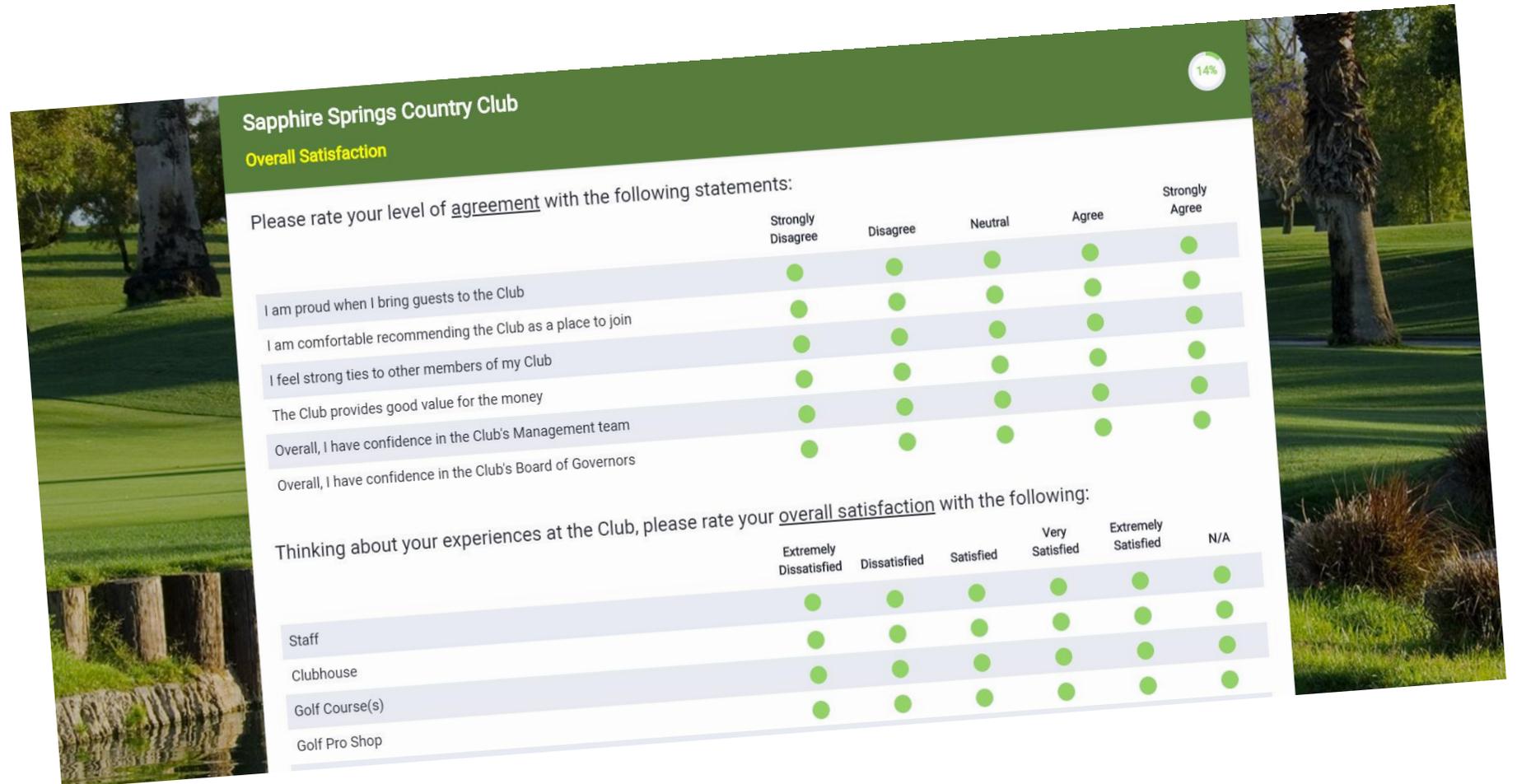


Active Listening System



Periodic Member Survey

- Modern survey design leveraging technology
- Respectful of Members time
- Inclusivity – All Members, Spouses/Significant Others
- Ad-hoc addendums (capital project prioritization, special issues, etc.)
- Anonymity/request for follow-up



Member Relationship Management

- Real-time alerts to facilitate resolving issues/concerns
- Empowers and develops Managers

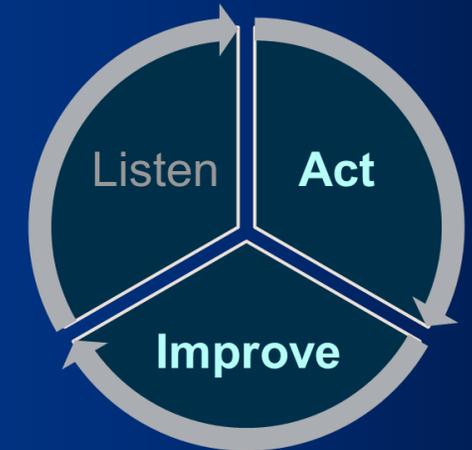
Case Cancel Save Case	
📍 Location Sapphire Springs 2	
✎ Title Guest feedback: Weeds in bunker on #8	
📄 Description Question: Please share your thoughts on what could be done to improve your golf experience? Answer: Weeds in bunker on #8	
★ Priority 1	👤 Assigned To Peter McC...
📁 Type Question	🕒 Status Open
🏷️ Tags Enter tag text here	

Edit

Jason Smith
MEMBER SINCE DECEMBER 21ST, 2018

🏠 12345
📞 +1 517 281 8283
✉️ jason.soltis@gmail.com

📷
📘
🐦



Active Listening System

- Available 24/7/365
- Displays on the Club Website and App (if applicable)
- Enables members/spouses to contact the Club whenever they choose

Sapphire Springs 2
Listening Post

Welcome to the Sapphire Springs 2 Listening Post, your voice is valuable in helping us continuously improve our services.

Do you wish to remain anonymous?

Yes

No

Would you like to...

Communicate a concern and/or issue

Recognize a Staff Member

Communicate an exceptional experience

Next

MEMBERCONNECT

Sapphire Springs 2
Concern or Issue

Please indicate the area of your concern and/or issue? Select all that apply.

Clubhouse

Dining Room

Golf Course

Another member

Staff

Other

Please describe your concern and/or issue:

Type Here

Previous Complete

MEMBERCONNECT



Periodic Member Survey



Listening Post

Active Listening System

- Brief, non-intrusive, relational evaluation
- Sent via text message to a random portion of the membership weekly
- Flexibility to control frequency of contact, opt-out, special event triggers



Periodic Member Survey



Listening Post



Ongoing Feedback

9:19 28° 94%

pp.memberconnect.com

Sapphire Springs 2

Please select the amenities you used during your visit?
Select all that apply.

<input checked="" type="checkbox"/> Dining	<input type="checkbox"/> Fitness Area
<input checked="" type="checkbox"/> Golf	<input type="checkbox"/> Pool
<input type="checkbox"/> Tennis	<input type="checkbox"/> Other

Next MEMBERCONNECT



9:19 28° 94%

pp.memberconnect.com

Sapphire Springs 2

How was your dining experience?

What one thing was key to your great dining experience?

Our server, Mary, was excellent!

Previous Next MEMBERCONNECT



9:20 28° 94%

pp.memberconnect.com

Sapphire Springs 2

How was your golf experience?

Please share your thoughts on what could be done to improve your golf experience?

Weeds in bunker on #8

Previous Next MEMBERCONNECT



Summary

Substantial declines in Members' Sentiment & Satisfaction

Many Overall Ratings Above Benchmarks..... **but moving**

Kudos to Several Areas

Best Opportunities for Improving the Member Experience:

- Golf Course & Shop
- Marina
- Community Landscaping

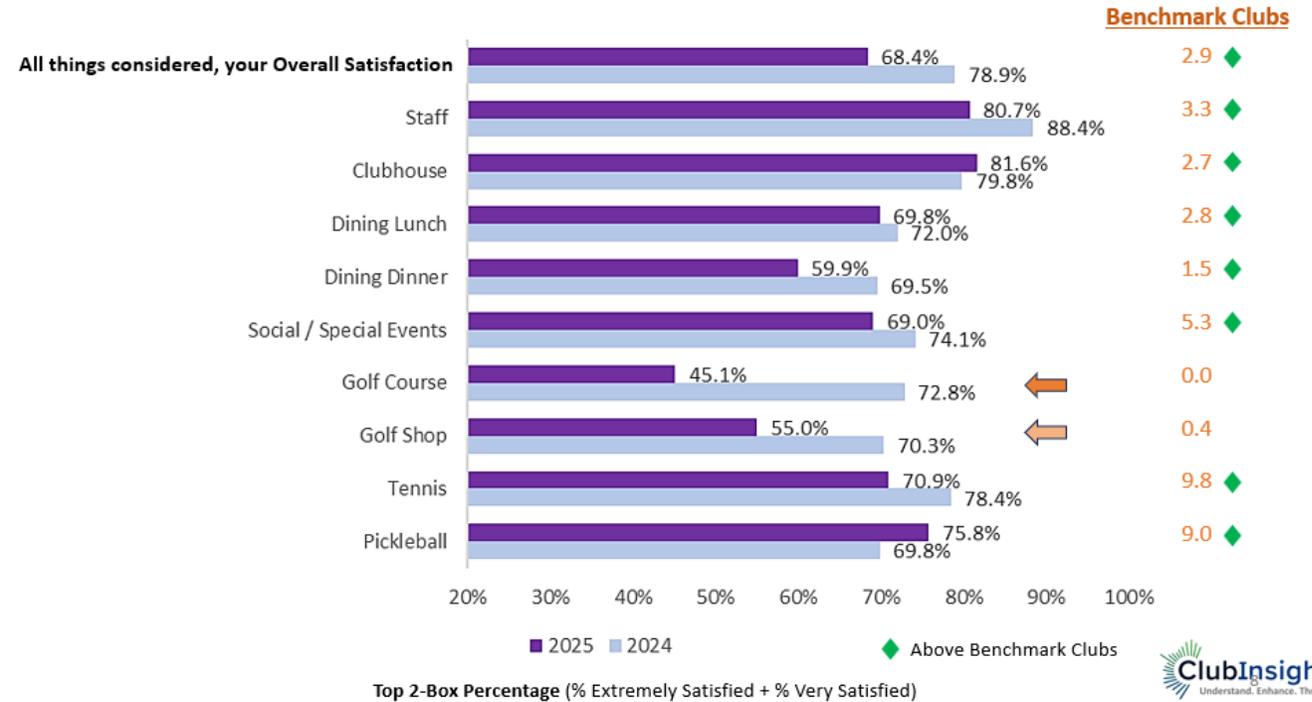
Continuous Improvement Mindset is Vital

"the performance today establishes the baseline for tomorrow"

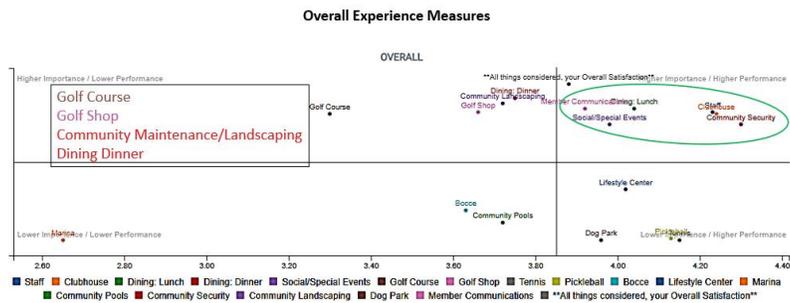
34

Executive Leadership Presentation

Overall Satisfaction Measures - Top 2 Box%



Overall Performance Improvement Map





2024 Member Perspectives Survey

Executive Summary

This past month, the second annual Member survey was conducted. The survey is designed to respectfully listen to all Members and Spouses/Significant Others and measures the Member's "experience" across all the Club's amenities. This enables Club leadership to assess performance, identify strengths and opportunities, and guide continuous Member experience improvement efforts.

The questionnaire contains agreement/sentiment questions, detailed satisfaction and performance measures across all the Club's amenities, and a liberal use of open-ended questions for Members to describe experiences in their own words. Additionally, Member profile and demographic information were requested to ensure the representativeness of those Members (and Spouses/Significant Others) responding to the full Member population as well as to facilitate an in-depth understanding of the results.

Social / Special Events

Member satisfaction with *Social/Special Events* is rated 14 percentage points above the Benchmark Club average, but declined by five points from last year and now stands at 69%. The highest rated areas were *atmosphere*, *event management*, and the *reservation process*. The best opportunities to enhance the Member experience with the *Social / Special Events* are the *value of events offered* and the *menu for events*.



Golf

Satisfaction with the *Golf Course* experienced a sharp decline and was rated at 45%, a decline of 28 percentage points, and now stands 35 points below the Benchmark Club average. The *tees*, *fairways*, and *greens* registered substantial decreases from last year's ratings. The *practice green* and *driving range* remain highly rated by Members.



Golf Operations

The Golf Operations also registered a substantial decrease, falling 15 points from last year's survey to 55%, and now stands 15 points below the Benchmark Clubs. Improving *apparel selection*, *equipment selection*, and *private lessons* offers the best opportunities for increasing the Member experience with *Golf Operations*.

Racquet Sports

Tennis: Twenty-one percent of Members reported utilizing the *tennis facilities* in the past six months, up two points from last year. Members rated their satisfaction with the *tennis facilities* at 71%, 11 points above the Benchmark Clubs. Four of the seven sub-questions were rated above 90%.



Pickleball: Thirty-three percent of Members reported utilizing the *pickleball facilities* in the past six months, up three points from last year. Members rated their satisfaction at 76%, up six points from last year and 17 points above the Benchmark Clubs. Six of the eight sub-questions were rated above 90%, with *quality of pickleball courts* rated 100%.





Are staffing issues dominating your day?

Staff Shortages Threatens Club Industry Boom!

Poaching is rampant as the hospitality industry struggles to fill positions. Burnout is real for staff due to long hours and no days off.

Identify keys to advance engagement and retention

Nurture the power of a positive culture

Cultivate a positive marketplace perception (be the employer of choice)

Align staff beliefs of service delivery and member realities



Highly engaged employees are 75% less likely to look for another job!

Happy staff stay longer and delight members!



Annual Subscription Rates

Periodic Member Survey & Listening Post	\$6900
Quick Pulse (includes Listening Post if standalone)	\$4000
Staff Rx	\$1800

(\$1200 credit applied if all three are selected)

Addendum (i.e., Capital related questions)	\$1000 - \$3000
---	-----------------



Outcomes

Members feel heard and that their voice matters
Knowledge to guide continuous experience improvement
Boost confidence in Leadership







Proposal



February 2026



15851 S US Highway 27 P.O. Box 800
East Lansing, MI 48826

Agreement

MemberConnect is a real-time, automated, turn-key, easy-to-use platform to engage with members; equipping all staff (frontline and managers) to be proactive in generating happier members that stay longer, spend more and tell others.

ClubInsights will work with Club Leadership to implement *MemberConnect* to gain insight into member experiences and identify those business practices or areas that if enhanced will have the greatest impact on continuously improving the member experience, retention rates and referrals.

MemberConnect Responsibilities:

- A. Listen (Voice of the Member) – customized to your Club’s amenities
 - i. Member Perspectives Survey – Annual survey (includes two questionnaire drafts and two survey reminders)
 - ii. Listening Post – provide hyperlink to Club for use on website, app, weekly emails or other forms of communication. Included with Member Perspectives Survey and/or Quick Pulse
 - iii. Quick Pulse – periodic text messages to portion of membership throughout the season
- B. Online Reporting & Case Management – initial set-up and staff training
- C. Board presentation summarizing results via zoom meeting
- D. Setup
 - i. Initial upload of member list
 - ii. Initial setup of staff members contact information and role
 - iii. Upload of Club logo and Club pictures
 - iv. Provide sample member communications
 - v. Setup of initial member messaging for email survey and text surveys
- E. Support
 - i. Available to staff for additional training and ongoing assistance

Club Responsibilities:

CLUB INFORMATION

- A. Member Information: The Club will email an excel or CSV file containing the necessary member and member spouse information
- B. Club Information: Logo, Staff/Department Head information, Club pictures, etc.

CHANGE MANAGEMENT

Substantive changes to the survey, survey process, and/or reporting impacting the cost of services will be provided in writing to the Club for approval before implementation.

INVESTMENT

Member Perspectives Survey & Listening Post	<input type="checkbox"/>	\$ 6,900
Quick Pulse (includes Listening Post)	<input type="checkbox"/>	\$ 4,000
Staff Culture Rx Survey	<input type="checkbox"/>	\$ 1,800
Discount if all three options above are selected	<input type="checkbox"/>	(\$ 1,200)
Report summary for members	<input type="checkbox"/>	\$ 750
Addendum section for additional questions	<input type="checkbox"/>	\$ Price based on scope

Pricing valid within 120 days of the date below.

Terms; First year payment due within 30 days of signed proposal. Subsequent years will be automatically invoiced on anniversary date.

CONFIDENTIALITY

MemberConnect by ClubInsights (*MC*) hereby acknowledges that during the Term of this Agreement *MC* may become privy to confidential information belonging to Your Club, including, but not limited to, all information compiled or learned about Your Club from the Surveys, the information contained in the Surveys, any Respondent Information or any other information learned about Your Club members. *MC* agrees that from and after the date of the execution of this Proposal including all times subsequent to termination or expiration of this Proposal, *MC* shall not use, divulge, make known, publish or distribute by any means any of the confidential information relating to Your Club learned, or otherwise made available to *MC* pursuant to this Agreement unless specifically authorized by Your Club to do so. Numbers may be used in aggregate industry comparables. In addition, *MC* hereby acknowledges and agrees that Your Club owns all information provided in connection with this agreement, all information obtained from the surveys and all reports. ClubInsights Privacy Policy can be found on www.clubinsights.com/privacypolicy. Your Club hereby acknowledges that *MC* owns the software and surveys and are proprietary to *MC*. Your Club has no right to independently use the software or surveys apart from this Agreement. The provisions of this paragraph may be enforced by injunctive relief and/or damages. It is specifically agreed that this paragraph shall survive termination of this Agreement.

University Park Country Club

Signature: _____

Printed Name: _____

Title: _____

Date: _____

MemberConnect by ClubInsights

Signature: Peter W. McCarty _____

Printed Name: Peter McCarty _____

Title: Vice President of Club R & D _____

Date: February 16, 2026 _____