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The special committee meeting of the **Strategic Planning Committee of the University Park Recreation District** will be held on **Monday, March 30th at 12:00 pm** in person at the **Lakeside Dining Room**. Zoom (virtual access) will not be available for this meeting.

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:
 - March 5, 2026, Strategic Planning Committee Special Meeting Minutes

Business Matters

1. Strategic Club Solutions (SCS) Engagement – Scope Review and Refinement

- *Presenter: Committee Members and SCS representatives*
- Overview of proposed scope of services submitted by Strategic Club Solutions (SCS)
 - Committee discussion to identify priorities and refine proposed deliverables
 - Evaluate alignment with recent planning efforts to avoid duplication of work
 - Determine recommended revisions or direction for engagement scope
 - Confirm next steps, including formal recommendation to the UPRD Board of Supervisors

Next Meeting Scheduled

Date	Meeting Type	Time	Location	Note
April 8, 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

March 5, 2026, Strategic Planning Committee Special Meeting Minutes

MINUTES OF MEETING

UNIVERSITY.PARK.RECREATION.DISTRICT.
STRATEGIC PLANNING COMMITTEE SPECIAL MEETING
Thursday, March 5, 2026
11:00 am
Business Offices
8301 The Park Boulevard, University Park, FL 34201

Strategic Planning Committee Members present in person or via Zoom:

Jim Freedman	Chair
Ronni Loundy	Vice-chair
Barbara Somma	Secretary
Ken Schreder	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
Vivian Carvalho	District Manager - PFM
Kwame Jackson	Assistant District Manager - PFM

Various audience members

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call, Pledge of Allegiance

The meeting was called to order at approximately 11:00 am by Ronni Loundy. Those in attendance are outlined above with all committee members present in person. A quorum was confirmed. Pledge was recited.

Public Comments

No public comments were made.

SECOND ORDER OF BUSINESS

Administrative Matters

Consideration of Minutes:

- a. January 14, 2026 Strategic Planning Committee Meeting Minutes
- b. February 11, 2026 Strategic Planning Committee Meeting Minutes

The Committee reviewed and considered the minutes from both meetings.

Motion: To approve the January 14, 2026 and February 11, 2026 Strategic Planning Committee Meeting Minutes as presented.

Motion by: Jim Freedman

Seconded by: Barbara Somma

Outcome: Motion carried unanimously.

THIRD ORDER OF BUSINESS

District Matters

REVIEW AND ACCEPTANCE OF
STEVE SWANSON'S
RESIGNATION FROM THE
STRATEGIC PLANNING
COMMITTEE

The Committee reviewed the resignation submitted by Steve Swanson following his election to serve as a Supervisor on the UPRD Board.

Assistant District Manager Kwame Jackson clarified that a formal motion was not required, as the item was simply to acknowledge that the Committee had reviewed and accepted the resignation.

The Committee acknowledged Mr. Swanson's resignation and expressed appreciation for his service.

No motion was made.

FOURTH ORDER OF BUSINESS

Business Matters

EVALUATION OF CLUB
BENCHMARKING DATA IN

RELATION TO POTENTIAL USE OF OUTSIDE CONSULTANTS

Mr. Freedman led a discussion regarding Club Benchmarking data and its potential role in informing the strategic planning process.

Topics discussed included:

- Comparison of University Park's operating metrics with peer clubs
- Use of benchmarking to help guide long-term planning decisions
- Relationship between benchmarking data and the need for an outside strategic planning consultant
- Feedback gathered during the recent Joint Committee Workshop

Committee members emphasized that benchmarking should be used as a reference tool to support strategic decision-making rather than as a strict directive.

No motion was made.

FIFTH ORDER OF BUSINESS

REVIEW OF STRATEGIC PLANNING CONSULTANT RFP SUBMISSIONS

Mr. Fetsick reviewed the responses received to the Strategic Planning Consultant RFP.

Three proposals were submitted:

- Strategic Club Solutions
- McMahan Group
- GGA Partners

Committee members discussed the proposals, including:

- Scope of services
- Strategic planning methodology
- Relevant experience with private clubs and communities
- Proposed pricing and project timelines

Sydney Johnson summarized the committee ranking totals, which resulted in the following order:

1. Strategic Club Solutions
2. McMahan Group
3. GGA Partners

Following discussion, the Committee agreed to recommend the ranked order to the Board of Supervisors.

Motion: To recommend the ranking of the Strategic Planning Consultant proposals as follows:

1. Strategic Club Solutions as the first choice,
2. McMahon Group as the second choice, and
3. GGA Partners as the third choice.

Motion by: Jim Freedman

Seconded by: Ken Schreder

Vote: Unanimous approval.

SIXTH ORDER OF BUSINESS

UPDATE ON MEMBER FEEDBACK PORTAL (CLUB INSIGHTS) AND IMPLEMENTATION TIMELINE

Mr. Fetsick and Ms. Somma presented information regarding the Club Insights / MemberConnect feedback platform.

Discussion topics included:

- Software capabilities including surveys and member feedback tools
- The Quick Pulse and Listening Post features
- Staff Culture Rx employee survey
- Potential overlap with surveys that may be conducted through the strategic planning consultant
- Timing and cost considerations

During discussion, an initial motion was proposed but did not receive a second.

Ronni Loundy then revised the motion.

Motion: To recommend implementation of the Quick Pulse (including Listening Post) and the Staff Survey, while leaving it to John Fetsick's discretion whether the broader member perspective survey should be conducted through Club Insights or through the selected strategic planning consultant.

Motion by: Ronni Loundy

Seconded by: Jim Freedman

Vote: Motion carried unanimously.

Next Meeting Scheduled

Date	Meeting Type	Time	Location	Note
March 11, 2026 (CANCELED)	Strategic Planning Committee Meeting	3:00 PM	Business Offices	In person or by Zoom
April 8, 2026	Strategic Planning Committee Meeting	3:00 PM	Business Offices	In person or by Zoom

Strategic Planning Committee Member Requests & Public Comments

Committee members briefly discussed future strategic planning topics and the ongoing evaluation of member feedback tools.

No additional public comments were made.

Adjournment

There being no further business, a motion to adjourn the meeting.

Motion by: Barbara Somma

Seconded by: Jim Freedman

Vote: Motion carried unanimously.

The meeting adjourned at approximately 12:32 p.m.

Strategic Club Solutions Proposal

Scope Review and Refinement

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 be 'R. 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.
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- Detailed working Strategic Plan Narrative to include initiatives and action steps
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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