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The committee meeting of the **Strategic Planning Committee of the University Park Recreation District** will be held on **Wednesday, April 8<sup>th</sup> at 3:00 pm** at the Business Offices located at 8301 The Park Boulevard, University Park, FL 34201 and or virtually.

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

**Join meeting via Zoom:**

<https://us02web.zoom.us/j/87390951556?pwd=8vthWiardxANmhNnXQevsA35GKZVGr.1>

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**One tap mobile**

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**Join instructions**

[https://us02web.zoom.us/meetings/87390951556/invitations?signature=O4vIWrvJH1OH7UfeWWfXAuGnQ7Go2KpvPe\\_gSzKcMas](https://us02web.zoom.us/meetings/87390951556/invitations?signature=O4vIWrvJH1OH7UfeWWfXAuGnQ7Go2KpvPe_gSzKcMas)

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## **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**

- Approval of Meeting Minutes (3/30/2026)

**Business Matters**

**1. Mission, Vision & Core Values – Initial Discussion**

- *Presenter: Committee*
  - Review the current Mission, Vision, and Core Values previously developed for the District
  - Discuss key elements, alignment with current organizational direction, and areas that may warrant further consideration as part of the broader strategic planning process

**2. Recreation District Value & Resident Communication Strategy**

- *Presenter: Committee*
  - Review materials related to the financial and operational value associated with the Club’s structure as a Recreation District
  - Discuss key messaging considerations and direction for development of a communications approach to effectively convey this information to University Park residents

**3. UPCA Materials Review (as it relates to the UPRD/Club)**

- *Presenter: Committee*
  - Review materials provided by the University Park Community Association (UPCAI) related to the Club, with consideration given to alignment in messaging and positioning where appropriate

**Next Meeting Scheduled**

<b>Date</b>	<b>Meeting Type</b>	<b>Time</b>	<b>Location</b>	<b>Note</b>
May 6, 2026	Strategic Planning Committee Meeting	3:00 pm	Business Offices	In person or by Zoom

**Strategic Planning Committee Member Requests & Public Comments**

**Adjournment**

**Approval of Meeting Minutes  
(3/30/2026)**

**Mission, Vision, Values:  
Original Presentation for Review**

The background features a dark blue gradient with a starry space pattern. Overlaid on this are several technical diagrams, including circular gauges with numerical scales (e.g., 140, 150, 160, 170, 180, 190, 200, 210, 220, 230, 240, 250, 260) and various circular arrows indicating motion or flow.

# UNIVERSITY PARK<sup>®</sup>

## DRAFT MISSION & STRATEGY

MARCH 2020

## A VIEW FROM THE OUTSIDE

# University Park...

*“...the award-winning, master planned neighborhood features beautiful landscaping, gas street lanterns and stylish homes.”*

*“Premier golf and country club community exudes elegance, natural beauty and luxury.”*

*Sarasota Herald-Tribune - February 8, 2020*

# PLANNING FRAMEWORK

Focus of this presentation

**Strategic**  
(Stakeholder Value)

Vision, mission, direction & strategy

**Tactical**  
(Goals, Master Plans & Policies)

Master plans, specific goals & strategies, Board policies to achieve the strategic goals

**Operational**  
(Operations, Budgets & Projects)

Budgets, projects & operations to achieve the tactical objectives

# WHY A MISSION & STRATEGY?

## So that...

- We can all communicate with a consistent message what University Park is about, its identity & its direction.
- Everything we plan and invest-in has a clear purpose, rationale, focus & pay-back.
- We can be pro-active, efficient & ensure long-term durability of University Park.
- We can achieve sustainable competitive advantage over time.

# “STAKEHOLDER VALUE”

Stakeholders are primarily our homeowners, residents & members

- Also, in a wider context: potential future owners/members; non-resident club members; public/tourist users of our facilities; management & staff; key service suppliers & the wider community.

Value can be seen in different ways, for example:

- Real-estate value - measured in a variety of ways.
- Lifestyle appreciation - surveys can gauge or rank this.
- Value proposition - to live, play or work here as compared to alternatives.
- Member experience – exceptional moments, events or service.

# MISSION

Continue to maintain and grow stakeholder value through:

## STRATEGIC GOALS

### 1. A premier gated residential development & semi-private club

- Exceptional location near to “everything” in a bustling, fast-developing area.
- Exceeding other local communities in perceived quality and excellence.
- Master-planned golf course, club & thirty-two harmonized neighborhoods.
- Widely recognized value proposition in the local market.

# MISSION

Continue to maintain and grow stakeholder value through:

## STRATEGIC GOALS

### 2. A residential haven:

- Natural beauty with outstanding, sustainable Florida landscaping.
- Exclusive, safe and tranquil residential environment.
- Outstanding golf, tennis, dining & other leisure activities - in a Club setting.
- Caring community culture, where one can make and keep friends.

# MISSION

Continue to maintain and grow stakeholder value through:

## STRATEGIC GOALS

### 3. A **well-managed** Community Association and District/Club:

- **Open** participation by residents, attention to their views & fairness for all.
- **Stable** assessments, “no surprises” management and a profitable Club.
- **Pro-active** action on big, longer-term issues & sound reserve funds.
- **Exemplary** employment practices that recognize high performance & memorable member experiences.

# MISSION, STRATEGY & BRAND

Drive **stakeholder value** through a **unique** combination of:

- Premier development & club
- Residential haven
- Well-managed

AND

A clear & strong **brand**

# BRAND STRATEGY

Use our mission & strategic goals to help:

- Define our brand ambition, core values & positioning.
- Identify our core essence or DNA to give focus to interaction with markets.
- Recognize & target different markets.
- Emphasize & draw attention, through selected marketing & advertising.

Develop strong relationships with key constituents to carry our brand messages.

1. Homeowners, residents & club members.
2. Real estate brokers & agents.
3. Local press & publications.

# BRAND IDENTITY

Masterbrand: UNIVERSITY PARK<sup>®</sup>

- For use by Community, RD, Club & PBM.
- To identify that they are a part of the brand.

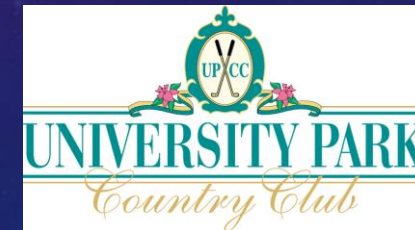
Sub-brand & logo: UNIVERSITY PARK COUNTRY CLUB<sup>SM</sup>

- Challenge name & identify existing equity.
- Consider using for *public market* face of the Club.

Business names:

- Park Boulevard Management LLC.
- University Park Community Association Inc.
- University Park Recreation District.

Agree rules for use of the above bands & names.

The logo consists of the words "UNIVERSITY PARK" in a bold, teal, serif font. A registered trademark symbol (®) is located to the right of the text. The text is set against a white background with a thin teal border above and below.

**Note:** the logos here are for example ONLY.

# “IN PARK” COMMUNICATIONS

As noted, our internal University Park market is **key**.

- Homeowners, residents, club members/guests/public users & our staff.
- As **influencers** in a wider market, including family, friends & acquaintances.

On-going **communication & reinforcement** of our direction, strategy & brand to this internal market will be a **key** to success.

- Nurturing our brand equity, with our biggest supporters.
- Persistent, consistent, discrete & thoughtful messaging.
- Leverage this **brand equity** in the wider market.

# WE/OUR = ALL UNIVERSITY PARK

This Mission, Strategy & Brand is for all University Park:

- UP Community Association
- UP Recreation District
- UP Country Club
- Park Boulevard Management LLC

Both Boards should consider adopting this “stakeholder value” focused mission, strategy & branding.

- Association and RD/Club Tactical & Operational plans & activities should be linked to this mission & strategy.

# PLANNING FRAMEWORK



# ANTICIPATE CHANGE

## Market-driven change

- Demographics of buyers in our real estate market will change.
- Lifestyle & property expectations will evolve.
- Market for our present offering - *golf & country club* - will change.
- Many of our homes are aging - in a market with much new construction.
- Growth of downtown Sarasota and local tourist market bring Club opportunities.

## We all need to listen, and...

- Appreciate the impact of these changes & embrace them.
- Be attuned to the speed & direction of these changes.
- Pay particular attention to interests of new owners & tourists, and a future they may indicate.

# TACTICAL – MASTER PLANS, GOALS & POLICIES

Linking the mission & strategy to operational initiatives:

- Specific strategies – expanding the broad strategy for specific areas or markets
- Master plans - club facilities, amenities, services, infrastructure, reserves/capital funding.
- Goals - S.M.A.R.T. (specific, measurable, attainable, relevant, time bound).
- Board Policies - providing key definitions or linkage to the strategy.

Often Board directed / sponsored:

- UPRD Board, with General Manager.
- UPCAI Board, with PBM management.
- Joint Boards / Mutual Cooperation Agreement.

# OPERATIONAL – DAY-TO-DAY OPERATIONS

Processes, projects & day-to-day activities geared to achieve the tactical objectives, through:

- Operating budgets:
  - **Club:** General Manager, with UPRD Board
  - **Community:** PBM LLC, with UPCA Board & Committees
- Specific plans & projects:
  - Defined project management
  - Measurable results

# Thank You - Questions?

# PROPOSED BRANDING ACTION

1. Masterbrand: UNIVERSITY PARK®
  - Now registered in name of UPCA, No 2497948,
  - For categories 36/37/41, with 43 awaiting approval.
  - UPCA will license to UPRD for full use.
2. Sub-brand: UNIVERSITY PARK COUNTRY CLUB<sup>SM</sup>
  - UPCA to register name and logo, with same categories as Masterbrand
  - UPCA will license UPRD for full use.
3. Other
  - Intellectual property legal & registration costs to be shared equally.
  - Establish internal rules for the use of these marks.
  - Cover all of the above in an Amendment to Mutual Cooperation Agreement.