



University Park Country Club

Strategic Planning Pre-Retreat Workbook Summary October 2026

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STRATEGIC CLUB SOLUTIONS



Overview

In October 2026, Strategic Club Solutions facilitated a *Pre-Retreat Workbook* in preparation for the University Park Country Club Strategic Planning Retreat. The workbook gathered insights and feedback from 18 participants, including Board members, participating committee members, and staff. Responses were submitted anonymously, and the workbook recorded only each respondent's role. These responses will focus discussions and ensure retreat time is used efficiently and effectively.

The responses are presented in two formats:

- Key summary points from feedback
- Verbatim responses

About this summary. The verbatim responses are the individual, anonymous opinions of retreat participants. They do not represent the collective views, findings, or positions of the University Park Recreation District, its Board, staff, or Strategic Club Solutions. Factual statements and figures cited by respondents have not been independently verified.

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Critical Priorities and Goals

What are the critical priorities and goals that University Park Country Club must focus on over the next three to five years?

Summary

- Facility investment is the most frequently cited priority. Members want a defined facilities and capital master plan, completion of the kitchen renovation, and upgrades to fitness/wellness, racquets, and aging buildings.
- Financial sustainability is closely tied to capital needs. Respondents call for closing what they describe as a roughly \$1 million capital gap, building adequate reserves, identifying new capital sources, reducing debt, and aligning dues with member value.
- Governance clarity is seen as essential. Members want clearly defined roles for the District (UPRD), the HOA (UPCAI), and Club management, a restored working relationship among them, and less outside involvement in daily operations.
- Many respondents want a formal multiyear strategic and business plan that defines the Club's identity and market position (lifestyle community or country club) and that includes assigned accountability, measurable goals, and consistent communication to the community.
- Long-term relevance depends on addressing an aging membership by modernizing the membership structure, programming, and amenities to attract younger members while retaining current ones, supported by strong staffing and service standards.

Verbatim Responses

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- *- getting the facility plans defined and underway - gaining understanding and working relationship with the UPCA I & UPRD - producing and maintaining the strategic plan*
- *Eliminating conflict between RD and HOA*
- *Must enhance the amenities that are provided - in particular the fitness center. To attract younger members and continue to enhance the experience of existing members this is a priority after the kitchen renovation. Additionally, most of the clients I had when working actively embraced remote work for part or all of their employees. All I hear is that we need new offices, and while the offices we have for our staff are an deplorable at best, I have not heard of any initiative to reduce the number of offices by hoteling, remote work for some functions entirely, etc. we seem to want to recreate what we have - and the world has evolved in the last 20 years. maybe even rent off site?*
- *1. Capital Improvement Projects: kitchen + fitness 2. Governance 3. Formalized strategic/financial planning*
- *1. 5 year strategic plan and 5 year business plan 2. Additional sources of capital 3. Club identity, what kind of club do we want to be*
- *Capital Planning and Execution Updated amenities Balance the \$1,000,000 capital gap in asset management Effective Communication to the community*
- *amenity improvement and member retention*

- *Assure that all the principal functions and activities, golf, dining, social, racquets, fitness, run smoothly with high qualities of service without undue costs for members.*
- *Financial stability Succession planning Prioritizing investments with available funds Aligning value with membership dues,*
- *1. Determine whether we are a life style community, or country club. 2. Determine desired market position, i.e.: high end / high cost, high end modest cost, or modest community with modest cost 3. Determine competitive position*
- *1. Addressing the 'aging' of the membership and the future of the demand for golf and other Country Club amenities 2. Defining, projecting, and raising the Capital Income to sustain the priorities established*
- *Targeted Capital Improvements- refresh old buildings to deliver needed amenities and reduce capital needs for 30 year old buildings. New Membership structure New "self-reliant" financial structure Improve Golf experience*
- *- Financial stability & debt reduction - Capital plan execution - Membership structure modernization - Enhanced amenities & member experience - Competitive positioning & marketing - Governance, transparency & operational excellence - Property value protection*
- *Investing in Facilities, create a true Facilities & Capital Master Plan, Outside Cafe space needs to be bigger, Kitchen remodel.*
- *Strategic Plan Business Plan Asset Renovations*
- *Over the next three to five years, I believe the Club's focus should be on strengthening its foundation in several key areas: Facilities and infrastructure: Continuing to invest thoughtfully in the Club's facilities and infrastructure to maintain their quality, address long-term needs, and ensure the Club remains an attractive and valued asset. Financial sustainability: Maintaining a strong financial foundation that supports ongoing operations while allowing for thoughtful planning and investment in the Club's long-term capital needs. Long-term operational stability: Establishing clarity and stability around the structure supporting the Club's operations. Resolving these considerations will provide the consistency needed to address immediate priorities while allowing the Club to plan confidently and execute its longer-term goals. Continued enhancement of the member experience: Building on the strengths of the Club and continuing to evolve the overall member experience through programming, service, and engagement.*
- *Over the next three to five years, UPCC should focus on modernizing its facilities, attracting the next generation of members, and building the operational stability needed to deliver a consistently excellent Club experience. 1. With an aging membership, the Club needs a deliberate strategy to attract and retain younger members while continuing to serve existing members well. Programming, amenities, event formats, and scheduling should evolve to reflect changing interests and lifestyles. 2. Finish the kitchen renovation and update the wellness center. Improve the racquets center with a tournament/spectator court and appropriate seating. Create a true, flexible activity space separate from the dining facilities so member activities do not compete with dining operations. Include a designated boardroom and meeting space for small groups, potentially by repurposing the current card room. Support these improvements with proactive maintenance and replacement planning. 3. Clearly define the responsibilities of the District and Club management. Residents and members need confidence in the operational leaders entrusted with making the Club successful. Establish a coordinated process for member*

input, clear decision-making authority, and accountability for results. Competing direction and excessive involvement in daily operations can delay progress and undermine effective management. 4. Adopt a realistic multiyear financial plan that connects capital improvements with their ongoing staffing, maintenance, and operating costs. Balance membership growth and revenue opportunities with service capacity, member value, and adequate reserves. 5. Support recruitment and retention through competitive compensation, training, professional development, safe workspaces, and clear service standards. Give departments the resources and coordinated planning needed to execute successfully. 6. Communicate priorities, financial decisions, project timelines, and results consistently. Turn the strategic plan into specific actions with assigned responsibility, deadlines, and measurable goals.

- *1. Upgrading amenities. 2. Developing means to produce adequate annual capital revenue and to generate a capital reserve fund sufficient to support capital assets. 3. Re-establish trustful working relationship with homeowners association.*

Challenges

What are the biggest challenges that University Park Country Club is currently facing?

Summary

- Governance conflict is the most frequently cited challenge. Respondents point to broken trust between UPRD and UPCA, internal feuding, lawsuits, board turnover, and political infighting that slow decisions and undermine professional management.
- Aging facilities are a major concern, particularly the fitness center, kitchen, and dining areas, with members noting that 30-year-old buildings lack the capacity and quality expected of a club of this level.
- Financial pressure is significant, including a capital reserve deficit, bond obligations that respondents cite at \$24 million, the absence of a long-term financial plan, and resistance from some homeowners to providing economic support.
- The membership is aging and largely disengaged, with social members making up more than half the total and many showing little interest in the Club, while no clear plan exists to recruit younger members.
- The Club lacks a clear identity and community consensus, as it tries to serve a broad range of interests, incomes, and housing types while facing inaccurate information in the community, slow action, and competition from newer regional clubs.

Verbatim Responses

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- *- Ending all the internal feuding between and within organizations. The UPCA and UPRD must establish a working relationship. The negative dynamics within the RD, including the extended network of past leadership, needs to cease if this organization is to thrive.*
- *Maintaining property values for 1201 properties*
- *Getting started - too much time talking and not enough time doing.*
- *1. Capital reserves deficit 2. Seceding from UPCA and re-writing the Mutual Cooperation Agreement, management structure 3. Public/Community Relations*
- *1. HOA alignment - having a collaborative relationship. 2. Building strong resident and member support for the club's vision, direction, and future goals. 3. Residents spreading misinformation.*
- *Building consensus in the community Aging infrastructure and amenities Age diversity of the membership Membership structure - Over half the members are social members*
- *Politics*
- *improve the fitness center so that it is comfortable and adequate for usage by members, with appropriate staff; improve the kitchen and make the food and service excellent*
- *Lack of a long-term financial plan Aging membership with no plan for recruitment of younger members/owners Lack of focus on priorities The amenities are not what they should be for a club of this level. Operating structure is limiting*

- *1. trying to be all things to all members, which is too broad of an opinion range. 2. we need to be focused on one objective as a community, which will most likely not appeal to all members due to vast range of housing stock, interests and income levels.*
- *1. Providing the lifestyle desired by both the residents and members for a reasonable price while maintaining the perceived value of our community 2. Maintaining the 'member experience' and "social fabric" of our community*
- *Based on voting and questionnaires, about half the membership does not want to get involved. Social Members are our largest group and about half do not want anything to do with the club. Our facilities are 30 years old and not large enough to accommodate all members.*
- *- Governance conflict and lawsuits undermining trust and stability - Long-term financial strain from \$24M bond obligations - Aging facilities, especially fitness and kitchen/dining infrastructure - Member-experience gaps in dining, events, and wellness - Unclear strategic identity in a semi-private model - Competitive pressure from newer regional clubs*
- *Aging Facilities, Stabilize the RD Board and Get Rid of Dean Matt... he is poisoning the well and costing this Club Years of progress and thousands of Dollars!*
- *Aging members Turnover Aging Assets / Outdated Assets*
- *One of the Club's most significant current challenges is navigating the differing perspectives and interests within the broader University Park community. The Club has undergone significant structural and governance changes over the past several years, transitioning from developer ownership to the University Park Recreation District in 2019. That transition, along with subsequent legal and governance matters, has contributed to a complex relationship among the Club, Recreation District, and Community Association. While there are many shared interests across the community, there are also differing perspectives regarding how the Club should be managed and supported. The ongoing challenge is balancing these varied perspectives and interests while maintaining a clear, stable, and consistent operating environment for the Club and its employees.*
- *University Park Country Club's biggest challenge is balancing the expectations of its longstanding membership with the need to evolve for the next generation of members. Our membership demographic is aging, and the Club must modernize its facilities, programming, amenities and overall member experience to remain relevant and competitive. Another challenge is governance and decision-making. Too many overlapping voices and competing opinions and board-turnover can slow progress and make it difficult for the professional management team to operate strategically. Long-term success will require clearly defined roles, stronger trust in operational leadership, timely decision-making and a willingness to make changes based on what will best position the Club for the future—not simply preserve the way things have always been done.*
- *Resistance to necessary economic support from homeowners. Broken trust between to UPCA and UPRD*

Strengths

What are the current strengths of University Park Country Club?

Summary

- The golf course is the Club's signature strength, widely recognized as one of the best semi-private courses in the Sarasota area, and outside play generates what respondents cite as roughly \$2.3 million in annual revenue that supports amenities across the District.
- The racquets facilities are also highly regarded, with tennis and pickleball recognized among the best in the area, rounding out a broad amenity mix that includes fitness, dining, and social offerings.
- Members consistently cite the Club's prime Sarasota location and the community's natural beauty, mature landscaping, and well-established residential setting, which together support stable property values.
- A strong sense of community and social connection is a defining asset, supported by engaged members, many of whom volunteer their time and expertise for the benefit of all.
- The staff is repeatedly named as a key strength, valued for their dedication, attentiveness to member needs, and the personal relationships they build with members.

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- *- named #1 semi-private for both golf and tennis facility in the area - thriving social environment - overall campus beauty - strong demand for golf course generating \$2.3M per year in revenue which benefits the entire RD amenities*
- *Great golf course*
- *Extremely talented members who are willing to volunteer their time and expertise for the benefit of all.*
- *1. Mature landscape/beauty 2. Location 3. Golf course and racquets facilities named best in Sarasota*
- *1. Sense of community 2. Staff 3. Golf Course 4. Location*
- *Highly rated golf course Outside golf provides positive income Location Scenic natural beauty Outdoor dining Tennis / pickleball The club is economically stable Our staff*
- *Great support from Members*
- *the quality and friendliness of the members, excellent golf and tennis facilities, and a beautiful location*
- *Golf course Continuity of membership*
- *1. Location 2. Quality environs 3. Tree lined community 4. Side walks 5. Gated community*

- *1. A community with the offering of an active retirement lifestyle that includes activities designed to satisfy the present and future needs of aspiring retirees 2. Management and staff that is attune to the members needs*
- *The location is great for all that Sarasota has to offer. The golf course is probably the best semi-private course in the area. The tennis courts and pickle ball courts are very good. The outdoor pavilion is a wonderful space for food and drinks.*
- *- Highly respected golf course - Stable property values and desirable residential environment - Broad amenity mix (golf, racquets, fitness, dining, social) - Prime Sarasota location with strong demand for club membership*
- *The Golf Course and the Employees!*
- *Upper Tier golf experience Upper Tier racquet experience Members / both residential and non-resident Membership Costs*
- *Strong Club culture and camaraderie: A genuine sense of community exists among employees, as well as between employees and members. Strong member relationships: Members value the personal relationships and level of connection they have with the Club team. Dedicated and engaged staff: Employees take pride in the Club and are invested in delivering a positive member experience. Breadth of amenities and experiences: Golf, racquets, wellness, dining, and social offerings provide a well-rounded Club experience.*
- *University Park Country Club's greatest strengths are its strong sense of community, highly engaged membership, dedicated staff, and the quality of its core amenities. The Club has a distinctive identity and attractive setting, with a membership that is deeply invested in its long-term success. The Club also benefits from a broad range of recreational, dining, social and wellness offerings that provide a strong foundation for future growth. Its location, established reputation and ability to offer both an active club lifestyle and a welcoming social environment are significant competitive advantages.*
- *Excellent staff. Excellent programs and events. Beautiful, well-established community*

Weaknesses

What are the current weaknesses of University Park Country Club?

Summary

- Aging and outdated facilities are the most widely cited weakness, led by an undersized fitness center and obsolete kitchen, along with limited activity space, tired golf facilities, a restrictive driving range, and capacity constraints in season.
- Governance remains a significant weakness, with mistrust and poor communication between UPCA and UPRD, unstable board leadership, a divided membership, and overlapping stakeholder involvement that slows decision-making and limits management's ability to act.
- Financial constraints, including a capital reserve deficit, a food and beverage operation that respondents describe as running at a loss, and no long-term financial plan, leave the Club unable to fund needed modernization at the desired pace.
- The aging membership and an outdated membership structure make it difficult to attract younger members, and the absence of a defined long-term identity compounds the challenge.
- Weak branding and limited market visibility put the Club at a competitive disadvantage against newer, more updated regional clubs.

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- *- unstable government situations with vile delivery on all sides - dated infrastructure starting with the health club and the negative aesthetic presentation of the 1980's blue roofs - overall branding/logos need a complete refresh - we do not know how to market our community*
- *Internal management conflicts*
- *Lack of communication of the two boards - both serve the same group of home owners.*
- *1. Aged infrastructure(capital reserves deficit) 2. Underwhelming amenities (beyond golf + tennis) 3. Public Perception 4. Organizational structure. Recreation District.*
- *1. Aging facilities 2. Capacity issues*
- *Lack of activity space Limited group fitness Aging amenities Difficult to attract younger members*
- *Facilities are outdated*
- *the fitness center is deficient in size, structure and amenities and the kitchen needs to be upgraded*
- *Financial instability and lack of a long term plan to address it. Bond indentures and future fee increases are not the answer Membership is aging, with over 75% of respondents being over 70 years old, and there is no plan to address this. Lack of*

leadership, with the GM departing and no replacement in place it's difficult to develop a strategic plan. Some strife in the community regarding future direction. Social members are costing the club money as they are being charged approximately \$1000 per year and the F&B operation is operating at a 50% loss. This area needs to be addressed to help fix the financial deficit. The amenities are not consistent with what you'd expect for a club at this level. Other competing clubs in the area offer more and are much more updated than UP. This makes it hard to compete. Lack of recognition in the market, i.e. I recently purchased a home and not one realtor recommended UP to me. My wife and I found it through a friend.

- *1. Outdated fitness center 2. Obsolete kitchen 3. Needed golf course improvements 4. Limited dining hours*
- *1. Aging inadequate facilities to provide the activities desired by residents and members 2. The challenges of 'special district' requirements and the Florida Sunshine Laws*
- *Golf check-in is disconnected and inefficient. The fitness center is sub-par. The grill room bathrooms are small. The Men's and Woman's golf bathrooms are embarrassingly tired and outdated. The driving range is restrictive. Not enough grass hitting area and limited flight balls. Pickle ball courts are packed in season in the morning.*
- *- Aging facilities, especially fitness and kitchen/dining - Insufficient capital for required modernization - Member experience gaps in dining, events, and wellness - Governance complexity and community tension - Outdated membership structure not aligned with modern club trends - Competitive disadvantage versus newer regional clubs - Weak brand visibility and limited marketing reach*
- *Divided Membership, No stability within the Board Leadership, aging facilities!*
- *Aging Members Some amenities don't match community standards*
- *Aging facilities and infrastructure: Some facilities require continued investment and modernization to meet evolving member expectations. Capital constraints: Balancing significant long-term capital needs with available resources can make it challenging to address all priorities at the desired pace. Complex organizational structure: The Club's ownership and operating relationships create additional complexity around decision-making and long-term planning.*
- *UPCC's primary weaknesses are an aging physical plant, fragmented space planning, and an organizational structure that can make decision-making slower and more complicated than necessary. The Club also lacks a sufficiently defined long-term identity around who its future member will be and what the overall UPCC experience should become. While individual amenities and programs are strong, golf, racquets, dining, wellness, social programming and other areas do not always operate as one cohesive member experience. Programming and facilities also need to evolve more quickly to meet changing expectations and appeal to future generations of members. Finally, overlapping governance, committee and stakeholder involvement can limit management's ability to act decisively. Clearer authority, stronger accountability and greater trust in*

professional operational leadership would help the Club move from reactive decision-making toward consistent execution of a long-term strategy.

- *Mistrust between UPCA and UPRD Inability to deal effectively with a few very disruptive homeowner/members. Inadequate capital funding.*

Opportunities

Where do you see opportunities for growth at University Park Country Club?

Summary

- Attracting younger homeowners and families is the most frequently cited growth opportunity, with members linking it directly to revised membership categories and upgraded amenities.
- Facility investment, particularly a best-in-class fitness and wellness center, an expanded kitchen, and modernized activity spaces, is seen as the primary driver of member value, satisfaction, and property values.
- Many respondents see an opportunity to modernize the membership structure through a lifestyle membership that consolidates social, racquets, and pass categories, along with room to grow golf and racquets membership among current residents.
- Stronger branding and active marketing to realtors and the broader Sarasota-Bradenton market could raise the Club's visibility and position it as a top-tier lifestyle community.
- Expanded programming, outside events, and private functions offer opportunities for added revenue and engagement, supported by greater community alignment, transparent communication, and a business-oriented approach to running the Club.

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- *- marketing the attributes of UPCC (see strengths comments) - revise membership categories to attract younger members - create a best in class health club to place our amenities best in class in the greater sarasota area*
- *Building condos*
- *Increase of amenities and enhance the experience of the members will bring younger home owners to the park.*
- *1. Newer/younger homeowners 2. Improved amenities + facilities 3. Build capital*
- *1. Capital Plan - updates 2. Marketing once capacity issues are resolved 3. Additional events in all areas*
- *Attract younger members Group fitness - member satisfaction Outside events to provide additional income Employee satisfaction*
- *Targeting younger family and social memberships*

- *yes. A greater number of residents should be members and there is room for more racquet and golf members*
- *Active program to market the community to realtors and others in the market Develop a plan and focus on it. It does not appear as if this club has been run like a business, it's time to do so. We need to have alignment around the future direction of the community with transparent disclosure to owners.*
- *1. Focus on top tier life style community and invest and market accordingly 2. Location 3. Quality of mature environment*
- *1. Modernizing the available activity spaces so that that all residents and members can enjoy the Club lifestyle desired*
- *Add a lifestyle membership which includes summer golf and some advantage over outside golfers in season.*
- *- Modernize and expand fitness & wellness - Transform dining through kitchen expansion and casual concepts - Grow Golf, Lifestyle, Racquets, and Social membership categories - Enhance golf value (various methods) - Expand social programming and community engagement - Improve brand visibility and modernize marketing - Execute capital improvements that boost property values*
- *New Fitness Facility and New Kitchen will add to the membership value and experience*
- *Enhance amenities to match community standards*
- *Strategic investment in facilities: Thoughtful capital investment provides an opportunity to enhance the member experience and strengthen the Club's long-term position. Continued evolution of programming and engagement: There is an opportunity to build on the Club's existing culture and further engage members across golf, racquets, wellness, dining, and social activities. Strengthening alignment across the community: Greater clarity and alignment among the various stakeholders could create a stronger foundation for the Club moving forward.*
- *University Park Country Club has significant opportunity to grow by modernizing its facilities and programming around how current and future members want to use the Club. There is also an opportunity to broaden the Club's appeal to a younger and more diverse range of future members by evolving social, wellness, recreational and lifestyle programming while still preserving the traditions and sense of community valued by longtime members. Finally, there is an opportunity to strengthen the Club's market position through clearer branding, stronger external marketing, expanded event and private-function business where appropriate, and a more defined identity around what makes UPCC distinctive in the Sarasota-Bradenton market.*
- *Single lifestyle membership to subsume social and racquets memberships, and various passes. Better communication to garner more support for ongoing attempts to improve community and amenities.*

Threats

What external threats or risks should inform our long-range planning?

Summary

- Competition from newer and recently renovated communities, particularly Lakewood Ranch and Palm Aire, is the most frequently cited threat, as these clubs offer more modern amenities at similar or lower cost.
- Rising costs, including inflation, labor, construction, insurance, and taxes, combined with economic downturns and real estate volatility, could strain finances and weaken membership demand.
- Unresolved governance conflict, poor cooperation between UPRD and the HOA, and the ongoing threat of member litigation pose reputational risk that could affect real estate values, staff retention, and how prospective members perceive the Club.
- Demographic shifts present a long-term risk, as the aging membership and changing expectations of future members raise questions about the future demand for golf and racquets and the perceived value of living in University Park.
- Delaying capital investment is itself a risk, since falling further behind on facility modernization could erode competitiveness, while Florida-specific factors such as severe weather and infrastructure resilience must also inform planning.

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- *- no resolution to political and organizational issues - external optics to point above and effect on real estate values - mounting debt on homesteads - continued drama on RD board including past board members*
- *Lakewood Ranch competition*
- *Other communities have greater and more modern amenities - for a very similar cost or less in some cases. Our location is also a big benefit in our favor but cannot carry the day alone.*
- *1. Economic inflation 2. Slowing growth to Sarasota*
- *1.Competition- Lakewood Ranch, Palm Aire 2. Developer expansion 3. Residents and frivolous actions against the club and board.*
- *Newer communities do not have to deal with aging infrastructure and have more modern amenities to attract younger members*
- *Supply shortages and monetary inflation*
- *Apart from weather-related threats, the cost and expense of being a member needs to be regulated so as not to be overly high and the club management should be streamlined*

- *Other communities that offer more and are more modern. Our F&B operation is a weakness and needs to be addressed. The fitness operation is weak and needs to be addressed.*
- *1. Ability to retain qualified management & staff 2. What appears to be lack of cooperation between UPRD and HOA 3. Constant threat of litigation 4. Economic cycles*
- *1. The aging of membership 2. The long range future of golf and racquet activities 3. The attractiveness of living in University Park..Its cost vs. the value perceived.*
- *Members lawsuits Increased taxes Poor working relationship with the HOA Private courses adding public golf*
- *- Strong competition from newer clubs - Inflation and rising operating costs - Economic downturns affecting membership demand - Climate-related risks and environmental regulations - Demographic shifts in member expectations - Real estate market volatility - Regulatory and governance risks tied to the Recreation District - Rising insurance and liability costs*
- *Debt, Rising Costs, Management Companies!*
- *Traffic flow Doing Nothing to enhance member experience*
- *Competing interests and differing community perspectives: The Club's unique ownership and governance environment can create competing priorities and perspectives. Rising costs: Increasing labor, operating, maintenance, and capital costs may place additional pressure on the Club's financial resources. Deferred capital needs: If significant capital needs cannot be addressed over time, they could affect the quality of the member experience and the Club's long-term competitiveness.*
- *The most significant external risks include increasing competition from newer and recently renovated private clubs, changing expectations among future members, rising operating and construction costs, and broader economic conditions that may affect discretionary spending and membership decisions. Demographic change is also an important consideration. As the current membership ages, UPCC must be positioned to attract the next generation of members whose expectations around wellness, technology, dining, programming, flexibility and overall club experience may differ significantly from those of today's membership. Labor availability and retention, insurance costs, severe weather, infrastructure resilience and other Florida-specific operating risks should also be incorporated into long-range planning. In addition, delays in completing needed capital improvements could create a competitive disadvantage if surrounding clubs continue to modernize more quickly. Lastly, UPCC should be mindful of reputational risk. In an increasingly competitive market, inconsistent service, prolonged internal conflict, unclear strategic direction or visible governance issues can affect member confidence, employee retention and how prospective members perceive the Club.*
- *Inability or unwillingness of some members to support financial needs of UPRD. Litigious nature of some community members.*

Projects or Initiatives

Beyond the goals mentioned above, are there any projects or initiatives that need to be discussed?

Summary

- Beyond the kitchen, members identified a range of facility projects for discussion, including the fitness and racquets center, a community center, relocation of the pro shop and administrative offices, a true lobby and reception area, adequate staff offices, meeting space, parking, and possible additions such as pickleball and bocce courts.
- Several respondents stress that projects must be reviewed and prioritized against limited funds and evaluated for how well each supports a top-tier lifestyle community, while others urge the Club to simply move forward.
- Golf-related initiatives include a long-term golf course master plan, improved course layout and flow, and revisiting the pro shop relocation noted in the 2017 master plan.
- Marketing and rebranding emerged as a distinct initiative, with members noting that the Club's top rankings are little known and that its logos and image need modernizing, along with defining what UPCC wants to be known for in the market.
- Strategic initiatives raised include a member demographic and succession strategy, a Club-wide programming review, and an evaluation of management company versus self-management.

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- *- in the 2017 master plan the pro shop and VC switch noted as an initiative. Mid to long term objective? - marketing UPCC. 2 #1 rankings no one knows about - rebranding the logos and image to align with 21st century - master plan for the golf course (long term)*
- *Kitchen renovation*
- *none - just get started - cannot please everyone with all that they want. Do the best that can be done with the information at hand.*
- *1. Management company vs. self-management*
- *Remaining projects after the completion of the kitchen*
- *Parking Meeting space for large groups with adequate technology Office space*
- *Facility renovations and dining concepts*
- *At some point consider additional pickle ball courts and a bocce court. Adequate facilities for employees need to be considered.*
- *First, the projects in the plan need to be reviewed and prioritized as we do not have enough funds to do all of them. I do think the kitchen and the fitness center are the two areas that need to be fixed.*
- *Yes, how does each project fit within a top tier / quality life style community*

- *With the bond passing.....the facility aging is being addressed*
- *Improved Golf experience- layout/flow Membership value*
- *No*
- *Fitness Center Equipment and Building, Management Staff Offices are a Joke, The Club needs a true Lobby & Reception Area,*
- *Kitchen Fitness / Racquet Center Community Center Pro Shop Location Admin Location*
- *The Club is moving forward with significant capital investment needs across its facilities and infrastructure. Prioritizing and appropriately addressing these needs will be an important initiative for the Club over the coming years.*
- *A member demographic and succession strategy. Understand who the next generation of UPCC members will be, what attracts them, what causes them to leave, and how the Club can evolve without alienating its existing membership. A Club-wide programming review. Identify what is heavily utilized, what has become dated, what is missing, and what programming should be introduced for different ages, interests and life stages. And, UPCC should decide what it wants to be known for in the Sarasota-Bradenton market. "A country club with golf, racquets and dining" is not enough of a strategic position when competitors offer the same things and often at greater scale.*

Stakeholder Expectations

Are there any expectations from stakeholders (i.e., members, employees, residents, etc.) that need to be met?

Summary

- Members and residents expect value that matches what they pay, including well-maintained facilities, expanded dining and fitness offerings, high service levels, and cost-effective management, with protection of real estate values as an overarching concern.
- Clear communication and transparency are widely expected, along with clarity on who is in charge, how decisions are made, and whether strategic commitments are actually carried out.
- Employees expect competitive pay and benefits, a quality work environment with adequate office space, professional development, clearly defined authority, and trust in their expertise.
- Stakeholder expectations are not uniform, as members value different amenities and investments, so the Club must balance competing priorities and engage dissenting voices while allowing professional leadership to make long-term decisions.
- Several respondents expect the Club to complete its transition from a developer-owned to a member-owned culture and to fully execute the capital improvement plan, with concern that bond delays could leave staff office needs unfunded.

Verbatim Responses

Individual, anonymous opinions reproduced as submitted. Not independently verified and not positions of the District, its Board, staff, or Strategic Club Solutions.

- *- overall concern is the real estate values. If our governance issues are not resolved and our project initiatives are not executed we will become the meadows.*
- *Who is in charge*
-
- *1. Communication 2. Participation 3. Clear direction*
- *In general, members expect the facilities to be open more and pay less with higher service levels. Employees expect good pay, good work environment, and benefits.*
- *Continue to measure and improve member and staff satisfaction Preserve and enhance property value Improve communications*
- *Too many to list*
- *The expectations are what I described above; a friendly recreational environment, a variety of activities and cost-effective management.*
- *Yes, it seems that there is a lack of communication with owners and this needs to be addressed. Also, there is one owner who is at odds with the Board and we can't just ignore him. we should engage him and try to resolve this issue as it is causing friction in the community.*
- *1. expand dining / outdoor cafe hours 2. expand fitness center and bring in state of the art equipment 3. improve golf course 4. retain good management*
- *1. Members and residents need to perceive the value received is commensurate with the costs incurred 2. Our management and staff need to believe they are working in a first class environment with reasonable benefits and facilities facilities and culture*
- *We need to fully transition from a developer owned club to a member owned club. "Yes" should be the answer to members whenever possible.*
- *Unsure of this question and it's relevance to the survey*
- *Yes, We are considered a Premier Club, but we have aging facilities and investment dollars are needed. In order for us to create the desired experience, we need the right tools and resources.*
- *Maintain amenities and way of life*
- *One of the more challenging aspects is that stakeholder expectations are not necessarily uniform. Members and residents have differing priorities regarding the amenities, services, and investments they value most. Some may place greater importance on enhancing or adding certain offerings, while others may question the need for additional investment in areas they use less frequently. Understanding and balancing these differing perspectives will be an important consideration in setting priorities and making decisions about the Club's resources and future investments.*
- *Members expect a consistently high-quality club experience, responsive service, well-maintained facilities, relevant programming, financial stewardship and clear*

communication about major decisions and capital investments. They also expect the Club to evolve in ways that protect the value of their membership while preserving the sense of community they value. Employees need clear direction, appropriate resources, competitive compensation and benefits, professional development opportunities, and trust in their expertise. They should also be able to work within an organizational structure where responsibilities and decision-making authority are clearly defined. Residents expect the Club and District to be responsible stewards of community assets, transparent in their planning and financial decisions, and mindful of how Club operations and long-range investments affect the broader University Park community. Across all stakeholder groups, there is also an expectation for stronger consistency, accountability and follow-through. People need to understand who is responsible for decisions, how priorities are established, and whether commitments made through the strategic planning process are actually being implemented. Stakeholder engagement should inform strategy without becoming a substitute for professional management. The Club must listen carefully to members, employees and residents while still allowing qualified leadership to make decisions in the best long-term interest of the organization.

- *The complete capital improvement plan, to the extent implemented, should help meet expectations of most stakeholders. I am concerned that because of the bonding delay, there may not be sufficient funds for new office space for staff. Since the staff is UPRD's most important asset, That presents a great concern.*



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