

Waterlefe Survey & Strategic Plan Joint MPOA & CDD Study

2017-2018

Committee Members

○ Core Team

- Bob Griswold Chair/MPOA
- Jim Davis CDD
- Jodi Carroll MPOA
- Jen Milne River Club
- Steve Dietz Golf
- Janice Reed Marketing/Golf

○ Homeowners

- Karen Enis, Franklyn Dickson, John Stevens, Art Miller, Mary Lou Kovac
- *Additional homeowners provided inputs*

History

Waterlefe Survey & Strategic Plan

- 2/17 Kicked off survey and strategic plan
- 10/17 Developed four key initiatives
- 12/17 Presented survey results to MPOA Board
- 1/18 Presented survey results to CDD Board
- 4/18 Sought survey recommendations from committees
- 5/18 Reviewed combined survey and strategic plan
- 6/18 Prepare for report to Boards

Recommend suspension of monthly meetings of Strategic Planning Committee

Recommend initiation of annual "State of Waterlefe Day"

Steps to strategic plan

- ❖ Develop Vision & Mission Statements
 - ✓ **Completed**
- ❖ Capture team ideas with SWOT Analysis
 - ✓ **Completed**
- ❖ Define Key Initiatives to achieve Vision/Mission
 - ✓ **Completed**
- ❖ Sort team ideas under the Key Initiatives
 - ✓ **Completed**
- ❖ Prioritize ideas into MPOA & CDD recommendations
 - ✓ **Completed**
- ❖ Seek buy-in from Boards



Vision Statement

Make Waterlefe the premier golfing and boating community in Florida's Central Gulf Coast. Promote our outstanding lifestyle as an ideal community for any family and seek ways to grow homeowner satisfaction.

Mission Statement

Protect and improve the value of our Waterlefe community. Promote home values through a strong Homeowner Association, support an active CDD that maintains our golf course, streets and public areas and encourage homeowners to maintain and enhance their properties.

Four Key Initiatives for Waterlefe

Developed 10/24/17

- I. Promote Homeowner Property Values
- II. Promote Homeowner Satisfaction
- III. Encourage Home Upgrades
- IV. Attract New Home Buyers

I. Promote Property Values

Strategic Plan Recommendations

- Maintain and upgrade our member facilities, common areas and community infrastructure.
- Sustain the visual attributes of our mature community that is located on the scenic and mangrove lined Manatee River.
- Promote the gated, quaint ambiance of a friendly community that offers world class golf and outstanding boating amenities with access to the Gulf of Mexico.

I. Promote Property Values Survey

- Upgrade Waterlefe entrance and individual entrances to residential areas. (clean, paint, plant, light)
- Remove old plantings and improve look of our community.
- Both Boards have a 5 year plan to repair and upgrade all homeowner amenities while controlling costs.
- Community safety is a key concern: both boards agree. CDD leads the perimeter security efforts and MPOA supports implementation and enforcement.

II. Promote Homeowner Satisfaction

Strategic Plan Recommendations

- Maintain community financial stability through good planning and careful management of community funds.
- Promote a vibrant and active community. Encourage social participation and use of our many and varied amenities.
- Keep common areas and homeowner amenities neat, clean and available for member use.
- Keep all technology up to date.
- Balance homeowner fees with the challenge of maintaining our infrastructure, roadways, landscape, irrigation, waterways and our social amenities.

II. Promote Homeowner Satisfaction Survey

- Many communications comments- New MPOA software, under development, will speed up communications and take members to source of data with push of one button.
- Many River Club restaurant comments- Menu choices, price points, open hours and use of linens- Will continue to balance requests against providing best value for all members.
- Many comments on common areas, roads, walks, curbs and south wall- Much progress has been made. CDD will continue to prioritize and fund improvements.
- Comments on maintaining homeowner boat access using boat lift and canals- Both boards agree and are working to maintain
- Need format to bond together Waterlefe marina, boaters and fisherman- Agree. Need a volunteer to organize and lead social events and communications.

III. Encourage Upgrades

Strategic Plan Recommendations

- Use DRB (Design Review Board) to maintain neighborhood standards.
- Remind homeowners that 15 year old interiors and exteriors need updating to enhance look and improve value.
- Encourage owners to seek ideas from professional sources and recent neighbor upgrades.

No survey information

IV. Attract New Homeowners

Strategic Plan Recommendations

- Use modern virtual tools to supplement Realtor initiatives for attracting new homeowners.
- Highlight attributes of Waterlefe
 - Gated community with world class golf course.
 - Secure lifestyle surrounded by beautiful and undisturbed nature.
 - Near Sarasota, Tampa, St. Petersburg
 - Many homes with backyard boat docks
 - Two marinas
 - Waterways to Manatee River and Gulf
 - Kayak storage and launch
 - Stable financials, many social activities, quality dining
 - Great entertainment, resort style pool, full fitness center
 - Scenic viewing – pier and pointe

No survey information

Follow-on Thoughts for Boards

- Put into practice the “Four Initiatives Standard”
- Prioritize, fund and implement recommendations
- Communicate actions and successes
- Hold a “State of Waterlife Day” next year
 - Review progress, plans and new needs