



PALMETTO DUNES
PROPERTY OWNERS ASSOCIATION
Strategic Planning Process

A Report on the 2023-2028 Strategic Plan



Executive Summary

As we approached the end of our current Strategic Plan, the Board of Directors and Administration felt the need to embark on a new plan to guide Palmetto Dunes' direction for the next five years. The past few years have brought tremendous change in our world and was an impetus for Palmetto Dunes to evaluate its current mission, vision and values as well as the topics of importance to our community. Additionally, ownership in Palmetto Dunes has changed significantly in the past few years opening the doors for tapping into new ideas and experiences.

The Strategic Planning Team was selected from many applications submitted by members interested in being involved in the process. With assistance from a fantastic facilitator, this team rolled up their sleeves and dedicated many hours of their time both in meetings and homework. They brought energy and enthusiasm to the table all while listening to the desires of their fellow owners for the future of Palmetto Dunes. The team developed a community survey that was then implemented by a local university to gather data on owners' history, experiences, and desires for Palmetto Dunes. They used information from the survey, community engagement sessions, and input from the board of directors and the team. Four key areas of focus and 2-3 action items we identified for the core of the plan. Thank you to all those who participated in the planning team, engagement sessions and community survey. Without you we would not have the vision we have for the future of Palmetto Dunes.

Pending board approval, the five-year strategic plan will be a fluid process and will be monitored and adjusted based on experiences and circumstances. It is the team's desire to stay involved and to engage the community along with the administration in moving this plan forward.

"Community is much more than belonging to something; it's about doing something together that makes belonging matter" -Brian Solis.

It is our hope that involving the community to make this plan a reality will achieve our mission to enhance the quality of life and improve the resources of our community for all who live, invest, work and play here.





The Strategic Planning Team

We invited owners interested in participating in the strategic planning process to apply to the Strategic Planning Team in early 2022. We were looking to have a diverse representation from all facets of the community to include full-time and part-time owners, owners who rent and owners who do not rent, single-family property owners and villa owners, as well as new owners in the community and long-standing property owners. We were pleased to have almost 60 interested owners apply to join the team.

Sandy West, the facilitator from the previous strategic planning process was retained again to facilitate, guide and lead the team through the process this year.

The Team was Chaired by Board Member Becky Brumley. Team members included Alice Bettencourt, Jerry Bowling, Lisa Carpenter, Terence Casey, Derek Dalton, Paula Eardley, Daniel Ekberg, Scott Imhoff, Steve Laskowski, Charles LoPresti, Cynde Moss, Kelly Schibler, Dawn Schlich, and Andrew Schumacher.

Facilitator

Sandy West, Principal of Lighthouse Consulting, is an organizational/talent strategy consultant and executive coach with 35+ years of experience working with Fortune-500 companies, start-ups and non-profit organizations. Her practice is focused on driving results through effective talent and business strategies. She believes discovering individual “exceptionality” – unique gifts, strengths and specialties – and developing them are essential to creating high-performing cultures that drive results and exceed goals. She has led over 100 hundred Strategic Planning processes for all types of organizations including the first Strategic Planning process for the Association in 2016-2017.

Engagement Sessions

In order to gather a wide range of opinions, feedback and be inclusive, we invited owners, as well as key stakeholders in the community to attend engagement sessions. Five engagement sessions were hosted; four were held in-person, and one was via Zoom. To ensure a candid dialogue, Sandy West facilitated these important sessions absent of any members from the team

Each session engaged a different group of important individuals: owners, commercial partners, community leaders, property managers, short-term rental companies, and realtors. They were asked to share their honest and candid opinions about Palmetto Dunes and give their thoughts on what is effective, appealing, and desirable about the community and what could be better. Participants were also asked to offer suggestions on what could make Palmetto Dunes an even more desirable place to live, invest, work and play.

Strategic Planning Timeline:

Board Workshop

Held a workshop for the Board of Directors in preparation for the Strategic Planning Team kickoff. We reviewed the processes being employed, team charter, discussed the community survey, and completed a SWOT analysis.

**Tuesday,
March 15, 2022**

Meeting #2

Revisited original Strategic Work, as well as the Mission, Vision, Values, Tag Line. Reviewed the Board's SWOT analysis, compare to/combine with the SPT SWOT. Provided an external scan (what in the community may have an impact to PD?) Defined "Great" for PDPOA.

**Tuesday,
April 19, 2022**

Meeting #3

Shared key competitors and admired communities. Reviewed Master SWOT. Brainstormed values/guiding principles. Provided an update on engagement sessions.

**Tuesday,
May 17, 2022**

**Tuesday,
March 29, 2022**

Provided Pre-Strategic Planning history and revisited the previous Strategic Plan and the outcomes delivered. Reviewed our charter and purpose and completed a SWOT analysis.

Meeting #1

May 11, 12, 17, 2022

- Conducted five engagement sessions with key stakeholders
- May 11: Property Owners
- May 11: POA Staff
- May 12: Commercial Partners and Community Leaders
- May 12: Realtors, Property Managers and STR Companies
- May 17: Property Owners-Virtual Session

Engagement Sessions

**Tuesday,
June 21, 2022**

Created a shared understanding of the community survey. Narrowed the Hedge Hog (Best At, Passionate About, Resource Engine). Began to create areas of focus and solutions.

Meeting #4

We followed best practices by gathering facts, performing an in depth SWOT analysis, received input from numerous stakeholders. Internal and external limitations were analyzed, and we defined our objectives prior to a final review.



Meeting #5

Reviewed previous SPT work: Mission, Vision, Values; Hedgehog; Common Themes-Positives/Strengths/What Works; Common Themes-Weaknesses/Opportunities /What Could Be Better; SPT Common Themes. Georgia Southern University presented the results from the Community Survey.

**Tuesday,
September 7, 2022**



Meeting #7

Finalized values and key areas of focus. The team began the creation of actions to support the key strategic areas of focus.

**Tuesday,
October 12, 2022**



Meeting #9

The team prioritized the key areas of focus and supporting actions.

**Wednesday,
November 16, 2022**



**Tuesday,
September 20, 2022**

Finalized the Mission, Vision and Values. Shared and discussed key strategic areas of focus and began to create common areas of focus and solutions, as well as brainstorming viable solutions.

Meeting #6

**Wednesday,
November 2, 2022**

The team edited their values statement and also revisited the 4 key strategic areas of focus and fine-tuned the focus areas and items.

Meeting #8



Community Survey Overview

As part of the strategic planning process, the Association partnered with the Center for Business Analytics and Economic Research (CBAER) at Georgia Southern University to develop a questionnaire that captures current owners' views on various topics relevant to our community. The survey was conducted from July 29 through August 14, 2022, as an integral part of this planning effort. Survey results were shared with the community on December 2, 2022. This section focuses on results that influenced the team's identification of key focus areas for the strategic plan.

The survey focused on services and amenities, features important to property owners, involvement in community-led activities, short-term rentals, and demographic information. It was distributed to 3,521 property owners via email, with 2,901 successful emails delivered. 1,096 usable responses were received, a 38% response rate of delivered emails.

Approximately 76% of respondents or their household members vacationed in Palmetto Dunes before buying here, and nearly half (47%) have owned their property for less than 5 years. There were slightly more condominium/villa owners (50%) responding than single-family homes (47%). Also, approximately 51% of respondent households had at least one person who is retired.

Of note, less than one-quarter of respondents identify themselves as full-time residents. Of those respondents who were not full-time residents, 60 percent spend up to three months here each year, with April and October the most popular, and about 70 percent plan to become full-time, with one-third of this group expecting to transition in one to five years.

The beach is the most important community feature for owners, with leisure trails the next most important. The natural environment, community amenities, a central island location, and the price range of homes were also very or moderately important. Ability to rent on the short-term rental market was most or moderately important for many owners, but also second least important to others (least important being having friends/family already living here).

Respondents overwhelmingly do not feel connected with other Palmetto Dunes residents. Only about 12% feel a strong connection with other residents, while 19% feel no connection at all. However, 64% indicated a desire to know more members in the community. Respondents had varying levels of interest in participating in potential events or amenities, with a fitness facility, wine tastings, and cooking demonstrations receiving the most interest.

The most frequently used amenities among respondents are the beach, followed by the leisure paths for walking, then biking. New amenities most desired by owners are a beachfront club (62%) and a fitness center (56%). Nearly 200 respondents commented on accessibility within the community, suggesting possible improvements to include beach mats, more ramps/fewer stairs, accessible parking spaces closer to the destination, and maintenance and structure of pathways.

Respondents had mixed views on some aspects of our community, such as whether we have the right balance of short-term rentals, sufficient security or are adequately maintaining the common areas





Who We Are

The mission statement, vision statement, and values each have their own distinct function within the strategic planning process. While developing these statements and further defining the PDPOA's identity, we felt it was important to establish a tagline as well.

Our Mission

To enhance the quality of life, strive to protect the natural environment, and improve the resources of our community for all those who live, invest, work, and play here.

A mission statement explains the organization's reason for existence. It describes what it does and its overall intention.

Our Vision

To be the best residential beach resort community in the southeast.

A vision statement is inspirational, aspirational, and describes the organization as it would appear in a future successful state.

Our Values

Accountable | Collaborative | Integrity
Respect | Sustainable

Values explain what the organization believes in and how it will behave.

Our Values Statement

Palmetto Dunes is accountable to our community, neighbors, visitors, and natural environment. We strive to build sustainable relationships through mutual respect, integrity, and a collaborative spirit.

Our Tagline

Where visitors become locals.

A variant of a branding slogan, a tagline, is a memorable dramatic phrase that sums up the tone and premise of a product. It reinforces and strengthens an audience's memory.

The Results



01. Build a strong, engaged community

- Increase the number of available amenities for owners
- Establish a Social Committee
- Develop a social media/communications plan to connect owners with a focus on positive messaging



02. Modernize infrastructure and enhance accessibility and safety across the community.

- Improve traffic flow and congestion
- Safety & Security
- Improve and expand leisure trails



03. Achieve mutually beneficial relationships with community partners to optimize the PD experience.

- Build structured & sustainable relationships with partners
- Work with Greenwood and commercial partners to explore partnership opportunities and to reinvest/improve properties. Find common ground with resort partners.



04. Enhance stewardship to increase sustainability

- Trash and Recycling
- Educate owners/visitors about the importance of wildlife in Palmetto Dunes
- Reduce Noise level via electronic lawn equipment

