



**Hilton Head Plantation
Property Owners' Association**

**Strategic Plan
2024 – 2028**

January 24, 2023



Hilton Head Plantation Property Owners' Association

Strategic Plan

2024 – 2028

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Hilton Head Plantation Property Owners' Association Introduction to the Strategic Plan 2024 – 2028

TO: Hilton Head Plantation Property Owners and Residents
FROM: Lori Schmidt, HHPPOA President
DATE: December 6, 2022

On behalf of the Hilton Head Plantation Property Owners' Association Board of Directors, I am pleased to present the Hilton Head Plantation Strategic Plan for 2024 - 2028. A great deal of time and effort has gone into the development of this Plan, and I would like to thank the Strategic Planning Committee, the standing committees, the POA staff and your Board of Directors for their input in developing this updated Plan. "I would particularly like to thank the Board Vice President, Ed Schottland for his time and efforts to put all this information together."

Your Board of Directors and staff use this document as their principal tool in determining the overall strategic direction for development and maintenance of our Plantation. The Plan enables us to anticipate as closely as possible future expenditures for infrastructure and capital items and it assists us in strategic financial planning.

The Strategic Plan is a "living document". At the end of each year, your Board measures its progress against this Plan and each standing committee reviews its portion of the Plan to assure that what we are doing is consistent with current conditions of your Plantation. During these in-depth year-end reviews, the Committees recommend, and the Board approves strategies and expenditures for the next five-year period.

Copies of the Plan are available at the POA Service Center. Your comments and suggestions are welcomed.



II. Planning – An Historical Perspective

In 1986-87, the Hilton Head Plantation Property Owners' Association began the transition of assuming full responsibility from the Melrose Company for the operational management of the Plantation. Responsibility for maintenance was assumed in 1987, security in 1988, and the architectural review process in 1994.

One of the early steps taken by the POA Board in financial planning was to establish the Weather Casualty Fund in 1988-89. The Fund was initially financed via a special assessment of \$100 per property in 1988 and a 25.3% increase in the regular annual assessment in 1989.

In 1992, upon the recommendation of the General Manager, the POA Board established a Major Repair and Replacement Fund, financed initially with a \$100,000 transfer from the 1992 operational budget. In that same year, the General Manager and staff initiated an Asset Study process of evaluating the Plantation's physical assets and establishing the current costs, estimated remaining useful life and projected cost of repair or replacement. This Asset Study is updated annually and serves as a guide for establishing priorities for the annual budget's Major Repair and Replacement Fund.

In 1997, the POA Board established a Strategic Planning Committee to provide leadership in establishing a long-range plan for the Plantation. One outcome of this effort was the development of a Financial Plan for the five-year period 1998-2002. That Plan was accepted by the Board in January 1998 and served as a useful guide for both revenue projection and priorities in expenditures for new capital projects and staffing.

In 1998, building on prior progress, the Board endorsed the concept of developing and implementing a comprehensive planning process that would involve members of the Board of Directors, members of all standing committees, the General Manager, and senior staff members. In 2002, the Board adopted a procedure to update the Strategic Plan every two years with progress measured annually. Since that time, the Plan was critically reviewed for changes in 2004, 2006, 2008, 2010, 2012, 2014, 2016, 2018, 2020, and 2022.



III. The Strategic Planning Process 2024-2028

In April 2022, the POA Board initiated its strategic planning process for the next five-year planning period. Stakeholders including the Board, members of all standing committees and POA staff were asked to provide detailed input which tasked participants with enumerating the POA's strengths and weaknesses. Participants were also asked to list opportunities for further improvements and threats that could possibly affect the POA's long-term operations. This SWOT analysis was completed in the fall of 2022 and provided further insight for the long-range planning process. The 2024-2028 Strategic Plan was approved by the POA Board of Directors at its January 2023 meeting.

The Strategic Plan serves as a primary guide to the Board and all standing committees in providing directions and setting priorities for management. It also serves the Board and General Manager as a guide in the annual budgeting process, which begins in June of each year.

The goals and objectives of each standing committee and the Administration Department are outlined in Part V. of the Strategic Plan. The combined results of the various SWOT analyses and an action plan for each standing committee and the Administration Department to accomplish their objectives, including strategies and measures of progress, are included in Appendix A.

Board Guidelines for Prioritizing Actions Proposed in the 2024-2028 Strategic Plan

1. The POA will operate within a balanced annual budget.
2. The Major Repair and Replacement Fund and Weather Casualty Fund will be maintained at appropriate levels.
3. The POA will maintain an appropriate balance between maintenance, renovation, and new construction of HHP facilities.
4. The POA will continue to improve residential access and telecommunications capacity within HHP, while adapting to changing technologies.
5. The General Manager will review all personnel requests and submit priority recommendations to the POA Board.

Key Themes for the 2024-2028 Strategic Plan

1. We should take care of what we have above and below the ground.
2. We should continue to improve communications between HHP Board/staff and HHP property owners/residents.
3. We should continue to improve the utility of existing recreation and POA facilities.
4. We should sponsor an appropriate level of recreation and education programs to appeal to our diverse population.
5. We should provide a safe and secure environment for all residents, staff, and guests.
6. We should maintain vigilance of our expenditures in light of economic conditions.
7. We should create more awareness of the benefits of HHP living in light of both on-Island and off-Island competitive developments.
8. We should enhance the competitive advantage for marketing residential properties within HHP by such actions as:
 - a. Promoting the Realtor Decal Program
 - b. Making the Realtor Open House Procedures more user-friendly.
9. We should continue to find ways to implement green technologies and improve recycling to protect our environment.
10. We should continue to emphasize the electronic voting option for POA elections.
11. We should continue to improve telecommunications capacity within HHP, while adapting to changing technologies.

Potential Major Capital Projects Identified for the Years 2024-2028

The current level of HHP property owners' assessments does not include funding for major new capital investments. These capital-intensive projects may need to be planned and financed using sustained user fees, Capital Transfer Fees and, if necessary, special POA assessments. The proposed Capital Projects for the next five-year planning cycle include:

1. Continuing to renourish and protect the Pine Island Beach to the extent permitted by federal and state regulations. The Town of Hilton Head Island is scheduled to take over beach renourishment responsibilities in 2025.
2. Continuing to upgrade and enhance the Security Department's equipment.
3. Continuing to make telecommunications improvements as necessary.
4. Implement the Master Plan for improving POA facilities.
5. Work to coordinate with the Town of Hilton Head Island on a long-term dredging schedule for POA-owned lakes and lagoons.
6. Addressing any necessary dredging of POA-owned lakes and lagoons for purely aesthetics reasons.
7. Consider expansion of the RV/Boat Storage Yard if demand for spaces warrants.



IV. VISION, ASSUMPTIONS AND PRIORITIES

Vision Statement

1. Hilton Head Plantation will continue to be the premier residential community in the Lowcountry by:
 - a. Maintaining the beauty and integrity of what we have
 - b. Operating with fiscal responsibility
 - c. Ensuring that our residents are safe, well-informed, and delighted to live, work and play here.

Assumptions

1. HHP residents will continue to desire to live in pleasant surroundings in a friendly and sociable atmosphere.
2. HHP residents' safety, security, peace of mind, and quality of life while maintaining and enhancing property values will continue to be our community's top priority.
3. HHP's population will continue to change, diversify, and attract working couples as well as retirees, requiring the expansion and adaptation of new and existing services.
4. HHP has achieved near total build out and traditional sources of POA income will change, requiring constant monitoring and adjustment.
5. Aging HHP infrastructure assets will require a comprehensive preventive maintenance plan as well as a significant amount of repair and replacement.
6. A major hurricane, fire, windstorm, or other natural disaster is always a possibility and HHP must be prepared financially and administratively.
7. As economies of communities centered on non-mandatory golf courses decline, existing communities centered on successful golf courses will be more attractive.
8. Traffic congestion on US 278 in southern Beaufort County will continue to create and increase commuting problems impacting POA personnel and Island resources.
9. The long-term trend of higher energy costs (primarily electricity) will continue through the planning period.
10. Changes in the US economy can be a significant factor during the planning period. POA budgets will continue to be closely monitored and expenditures scrutinized.
11. The Town of Hilton Head Island will continue to partner with the POA for debris removal after a natural disaster and for care of the HHP storm water management system.
12. The private business entities in HHP including Safe Harbor at Skull Creek, and the four golf courses will continue as viable operating entities from which the POA will receive assessment revenues.

Organizational Priorities

1. For the POA Board and General Manager
 - a. Keep informed and involved in any town, county or state activities, ordinances, laws, or regulations that would have an impact on HHP as well as other public issues that local and state government should address.
2. For the POA Board and All Committees
 - a. Adhere to responsible management principles and sound fiscal policies to protect our quality of life and enhance property values.
3. For the ARB, Covenants, Maintenance and Recreation Committees
 - a. Conserve, protect and enhance HHP's extraordinary natural flora, fauna, beauty, and serenity through enlightened and responsible habitat conservation and wildlife management.
 - b. Remember that we are stewards of the natural gifts found on this Island. Our actions will be to live in harmony with nature and not upset a delicate balance that is essential to sustain life in all forms.



**V. GOALS AND OBJECTIVES SUMMARIES
FOR THE STANDING COMMITTEES**



HILTON HEAD PLANTATION PROPERTY OWNERS' ASSOCIATION

STRATEGIC PLAN 2024 – 2028

ADMINISTRATION

GOAL:

Provide quality administrative support to Board of Directors, Committees, and residents by maintaining a safe work environment, training staff, staying abreast of technological changes, adhering to government guidelines, and responding to special requests.

OBJECTIVES:

1. Staffing - Provide a stable competent staff in a changing labor force to satisfy the needs of HHP's property owners and residents.
2. Safety - Provide a safe work environment for all employees and safe facilities for all Plantation residents and visitors.
3. Efficiency - Use current and future technology to automate POA services and increase efficiency while reducing costs.
4. Training - Provide training to maximize staff efficiency and reduce outside consulting costs.
5. Space - Provide adequate storage for POA data equipment and provide a comfortable work environment for employees.



HILTON HEAD PLANTATION PROPERTY OWNERS' ASSOCIATION

STRATEGIC PLAN 2024 – 2028

ARCHITECTURAL REVIEW BOARD

GOAL:

Provide consistent and effective review of all design submittals ensuring conformity with the Plantation's Covenants and ARB Guidelines.

OBJECTIVES:

1. Communications – Develop understanding by homeowners and commercial vendors the importance of following our building procedures.
2. Enforcement – Assure compliance with the Covenants and/or ARB Rules and Regulations.
3. Governing Documents – Provide documentation of building procedures to insure that ARB Rules and Regulations are supporting of and consistent with the Amended Protective Covenants.
4. Advice – Provide advice to owners, architects, and landscapers about how to improve Class A, B, and C submitted plans and how to enhance probability of approval by the ARB.



HILTON HEAD PLANTATION PROPERTY OWNERS' ASSOCIATION

STRATEGIC PLAN 2024 – 2028

COMMUNICATIONS COMMITTEE

GOAL:

Improve the value, quality, and effectiveness of communications between residents, staff, Board of Directors, and potential property owners.

OBJECTIVES:

1. *Plantation Living* – Continue to improve the value and readership of *Plantation Living* monthly newsletter.
2. Continue to optimize face-to-face communication between residents, Staff and Board of Directors as relevant and appropriate.
3. HHPPOA Website – Increase the number of HHPPOA property owners using the Website as an important part of their communications process with the HHPPOA Board, its Standing Committees, and the professional Staff. Strive to make the Website a vital source of information for residents.
4. Continue to explore the use of multimedia to improve and/or expand communications between residents, Staff, and the Board of Directors where appropriate. Consider the use of “alternate” electronic technologies (especially in future years with rapidly changing technologies).
5. Produce the 2024 Resident and Opinion/Demographic Survey. Produce the 2027 Resident and Opinion/Demographic Survey.
6. Continue to optimize email blast notifications as a main source of communication between HHP POA Staff and residents. Increase the number of property owners who subscribe to the email blast system.



**STRATEGIC PLAN
2024 – 2028**

COVENANTS COMMITTEE

GOAL:

Promote harmonious community living while protecting and enhancing property values through consistent enforcement and application of Hilton Head Plantation Property Owners' Association (HHPPOA) Covenants and Rules and Regulations.

OBJECTIVES:

1. COMMUNICATE, educate, and increase HHP residents' awareness of both the Covenants and Rules and Regulations.
2. Identify and ENFORCE in a timely manner HHPPOA Covenants and Rules and Regulations.
3. Provide CONTINUOUS ENHANCEMENT for recommendations to the HHPPOA Board of Directors to ensure that the Rules and Regulations are supportive of and consistent with the Amended Protective Covenants.



**STRATEGIC PLAN
2024 – 2028**

FINANCE COMMITTEE

GOAL:

Provide sound, pro-active and farsighted fiscal stewardship through prudent policy establishment, review, and management.

OBJECTIVES:

1. Maintain property owner assessments and other revenue at a level consistent with maintaining HHP as the premier residential community in the Lowcountry. Provide oversight so that the Plantation's finances are implemented and managed in a value driven and cost-effective manner.
2. Avoid special assessments by ensuring that adequate funds are available in the Major Repair and Replacement and Weather Casualty funds, confirm that suitable lines of credit are maintained, monitor risk elements, and provide recommendations to the Board.
3. As directed by the Board, review existing financial controls and investment policies, and make recommendations to the Board as needed.
4. Support the Board in annual independent audit process. As directed by the Board, review and recommend revisions to the contracting process of hiring the independent auditor.



STRATEGIC PLAN 2024 – 2028

MAINTENANCE COMMITTEE

GOAL:

The Maintenance Committee works to provide recommendations for routine scheduled maintenance and hear updates on unscheduled projects. The committee supports the maintenance plans for all HHP POA common properties, facilities, roads, leisure paths, revetments, lagoons, drainage systems, salt marshes, conservancies, and other physical assets.

OBJECTIVES:

1. Review the condition of each of the following six community asset classes and make recommendations for changes and/or improvements of planned or necessary maintenance programs where appropriate:
 - a. Common POA property and conservancies
 - b. Structures such as Plantation House, Spring Lake Complex, Dolphin Head Pavilion, as well as the entry/exit gates, security office, maintenance garage, and other buildings
 - c. Roads and leisure paths
 - d. Lagoons and lakes
 - e. Drainage system
 - f. New Dolphin Head Recreation Area, Pine Island and extended shoreline including the Bluff revetments, lagoon system, and salt marshes
2. Gauge customer satisfaction from neighborhood surveys, monitoring or feedback submitted to the POA Board or information submitted to the General Manager/Director of Maintenance regarding each of the six community asset classes listed above and recommend actions as appropriate.
3. Review the five-year list of Capital Improvements that is maintained by the General Manager/Director of Maintenance. Make recommendations for any change in the maintenance requirements against restraints (e.g., budget, manpower, conflict with other projects or contracted services) and provide recommendations to the POA Board.
4. Review the Storm Water Management Agreement HHPPOA and the Town of Hilton Head and provide recommendations to the POA Board regarding renewal, modification of terms, and value received from this agreement annually.

5. Participate in the annual area maintenance audit and identify signage improvements, landscaping options for the beautification of entry ways, roadsides, and other common areas that can be implemented in a sustainable manner
6. Develop a long-range maintenance plan for the new Dolphin Head Recreation Area.
7. Work with the Town of Hilton Head Island to develop a long-term dredging schedule for the lakes and lagoons located within the boundary of HHP.



**STRATEGIC PLAN
2024 – 2028**

RECREATION COMMITTEE

GOAL:

Provide creative and stimulating recreational facilities and programs that are adaptable to the changing needs and diversity of our residents.

OBJECTIVES:

1. Review existing recreational programs to keep them interesting, stimulating, and adaptive to our changing needs.
2. Inspect and evaluate existing recreational facilities to ensure that they are properly equipped, well-maintained, and suitable to the changing needs of our residents.
3. Consider the need for Phase IV of the Spring Lake Master Plan, the renovation/replacement of the Plantation House, the second phase of Dolphin Head Recreation Area project, and other Capital Projects that are desired by the community.



**STRATEGIC PLAN
2024 – 2028**

SECURITY AND SAFETY COMMITTEE

GOAL:

Advise the POA Board on matters of security, public safety, and technology in an effort to provide a positive environment for the residents, guests, staff and others permitted to live, work and play in Hilton Head Plantation.

OBJECTIVES:

1. Personnel – Maintain a competent, well-trained staff capable of effectively and efficiently addressing routine duties and issues, as well as handling new challenges and situations.
2. Crime Prevention – Minimize the incidences of crime in HHP.
3. Traffic Safety and Control – Maintain efforts to reduce the number of traffic accidents; to minimize traffic congestion.
4. Resident Assistance – Maintain a high level of service for resident assistance.
5. Operational Efficiency – Monitor and review new technologies, operational equipment, and facilities asset to cost effectively enhance the success and safety of Security Department personnel.
6. Disaster Response – Maintain and constantly review an adequate Disaster Response Program for both man-made and natural disasters, and a Hurricane Evacuation and Re-entry Plan (training, procedures, required equipment, facilities, etc.).



VI. COMMUNICATING THE STRATEGIC PLAN

The 2024–2028 Strategic Plan will be made available to Hilton Head Plantation Property Owners and Residents in a number of ways:

- **Presentation and distribution at the 2023 Annual Meeting**
- **Posted on the HHPPOA website**
- **Distributed to HHP clubs**
- **Discussed at Coffees with Peter**
- **Available in hard copy at the POA Service Center**



**Hilton Head Plantation
Strategic Plan for 2024-2028**

HHP Property Owners are invited to comment on the structure and content of the Executive Summary. We solicit your thoughts, opinions, and participation in helping to achieve the Vision, Goals and Objectives presented herein.

Hand Deliver to:

HHPPOA Service Center
Attention: General Manager
7 Surrey Lane
Hilton Head Island, SC 29926

Mail to:

HHPPOA Service Center
Attention: General Manager
PO Box 21940
Hilton Head Island, SC 29925
Email to: admin@hhppoa.org

Your Comments:

The following information is optional:

Name: _____

Address: _____

Phone: _____

Email address: _____



Hilton Head Plantation Property Owners' Association

Strategic Plan 2024 – 2028

APPENDIX A

SWOT Analyses and Action Plans

Each standing committee and the Administration Department were tasked with evaluating the Strengths, Weaknesses, Opportunities and Threats with regard to the Property Owners' Association (a SWOT analysis) as they relate to that committee's or department's area of responsibility. Once the SWOT analysis was completed, specific strategies and measures of progress were developed to accomplish each committee's or department's objectives. A consolidated SWOT Analysis incorporating input from all the standing committees and the Administrative Department appears on pages 21-27.

Hilton Head Plantation Property Owners' Association

Consolidated SWOT Analysis

2024 – 2028

Strengths

Well established and maintained on-island community:

- Effective policies and practices in place
- Effective enforcement procedures
- Professional and experienced staff
- Flexibility and adaptability
- National reputation
- Outsourced landscaping
- No short-term rental

Communication:

- Plantation Living
- Email Blasts
- Website
- Electronic Signs
- Community Survey's

Relationships:

- Sound relations with the Town of HHI
- Stormwater Management Agreement

Financial Health:

- No external debt
- Excellent credit rating
- Adequate financial balances and reserves
- Diversity of income sources
- Capital Transfer Fee
- Operational economies of scale
- Cost effective management of neighborhood finances
- Affordable fees
- Reasonably affluent property owners
- Historically very high assessment collection rates
- Reputation as a desirable and affordable community to live in with low annual fees

Physical Aspects:

- Natural beauty, peaceful environment provides residents a tranquil style of living
- North End of the Island – better elevations and separation from touristy congestion
- Physical amenities for residents

- Close to Emergency Responders
- On-Site Maintenance Facility

Residents and Programs:

- High percentage of full-time resident property owners
- Cadre of experienced and talented volunteers
- Diverse clubs, programs, and events

Hilton Head Plantation Property Owners' Association

Consolidated SWOT Analysis

2024 – 2028

Weaknesses

Rules and Regulations:

- Governing documents need frequent updating
- Lack of awareness by owners/tenants
- Irresponsible behavior of part of residents and contractors
- Lack of understanding of the level of education, training, experience, expertise, and certification of our staff.
- Lack of understanding of the role of our officers.
- POA has little enforcement leverage in foreclosure/bankruptcy cases
- Contractor compliance, especially with renewed activity
- Part-time owners

Communication:

- Plantation Living – Timing of publication every month
- Email Blasts – Un-subscription rate by accident or resident intent
- Electronic Sign too dark to read during the day

Relationships:

- Competition with off-island communities
- Golf course cooperation

Financial Health:

- Few new home sites available
- Economic circumstances
- Significant population of residents with fixed income
- Non-assessment revenue opportunities effectively capped at present

Physical Aspects:

- Age of some capital equipment and infrastructure
- Inadequate audio/video recording system at gates
- Lagoons continue to collect silt – some have become shallow as they fill up
- Need for improved fiber and cell phone infrastructure
- Lack of trail connection with Main Street
- Delayed upgrades due to competing priorities

Residents and Programs:

- Lack of interest/apathy by residents
- Aging resident population with the likelihood for increasing demand for services
- Aging senior staff and loss of corporate knowledge and relationships
- Staff turnover - vacancies

Hilton Head Plantation Property Owners' Association

Consolidated SWOT Analysis

2024 – 2028

Opportunities

Rules and Regulations:

- Continual education and reinforcement of Rules and Regulations
- Collect and analyze traffic safety and crime data as input to Security Department

Communication:

- Plantation Living – new advertisers, more Harry Heron
- Email Blasts – increase subscriptions, texting information system
- Website – Blogs, photos, online advertising
- Increase visibility of individual officers to residents in public forums
- Increase guest speaker time at Coffee with Peter

Relationships:

- Residents take pride in HHP
- Partnering with the Town of HHI in beach renourishment
- Partnership
- Increased ability to monitor how comparable communities manage and maintain their assets

Technology:

- Continue technology advancements
- Take advantage of new software products or technologies to improve scheduling maintenance
- Take advantage of new software products or technologies to enhance performance of the Security Department
- Consider utilizing alternative energy sources for POA buildings and vehicles
- Automated reservation system
- Explore electric vehicles

Physical Aspects:

- New amenities (dog park and pickleball)
- Update amenities – Hickory Forest boardwalk, facilities
- Expansion of bocce courts
- Differentiate ball field usage
- Available facilities promoting healthy lifestyle for families
- Aging homes to renovate/update
- Continue effective planned/scheduled maintenance of community property and equipment
- Identification of next Major Capital Project

Residents and Programs:

- New programs

Hilton Head Plantation Property Owners' Association

Consolidated SWOT Analysis

2024 – 2028

Threats

Rules and Regulations:

- Creation of government regulations that significantly increase compliance costs
- Lack of awareness by owners/tenants
- Irresponsible behavior of part of residents and contractors
- HHI bridges
- Energy shortages

Crime:

- Cyber hacking
- Vandalism
- Abuse misuse of Guest Pass System
- Firearm safety

Climate:

- Severe weather threats
- Pandemic
- Continued erosion of Pine Island

Relationships:

- Competition with off-island communities

Financial Health:

- Limited financial resources of owners
- Aging population / Changing demographic.
- Plantation Living – cost due to digital era
- Economic circumstances
- One or more commercial entities going out of business
- Competition from off-island communities impacting workforce availability
- Return of high fuel and energy costs
- Rising insurance premiums
- Recessions

Physical Aspects:

- Aging capital equipment and infrastructure to require higher maintenance

Residents and Programs:

- Loss of corporate knowledge

Staffing:

- Lack of workforce housing
- Economy
- Off-Island competition
- Leadership turnover



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ADMINISTRATION

OBJECTIVE #1

Staffing - Provide a stable competent staff in a changing labor force to satisfy the needs of HHP’s property owners and residents.

STRATEGIES	MEASURE	STATUS
1. Review salary scale bi-annually to ensure POA salaries remain competitive with the marketplace and minimize turnover.	Staff turnover is reduced to 5% or less annually.	1. Ongoing – 2022 – Reviewed bi-annually
2. Continue to offer and research employee incentives.		2. Ongoing – Obtain input from Staff and other like organizations annually.
3. Periodically review employee work hours to minimize impact on peak travel periods.		3. Ongoing
4. Work with Town, County, and State Representatives to improve traffic conditions on Route 278. To include the widening of the Bridge to three lanes.		4. Continue to work with appropriate community groups to continue to have an influence with County and State Governments to improve traffic conditions on route 278, the Bluffton Parkway and advocate appropriate land uses to minimize future traffic.
5. Consider 1% sales tax to fund roadway improvements and buying Land and Development Rights.		5. County is considering a Referendum on 1% sales tax.

ASSUMPTIONS

1. The labor market in Beaufort County has tightened as the economy continues to improve the local labor market is becoming very competitive.
2. Competition from both Island and off-Island employers for quality personnel will continue.
3. Making travel to HHP easier and providing employee incentives will make HHPPOA an attractive employer.
4. The new HHI Bridge will move forward.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ADMINISTRATION

OBJECTIVE #2

Safety - Provide a safe work environment for all employees and safe facilities for all Plantation residents and visitors.

STRATEGIES	MEASURE	STATUS
1. Continue to meet OSHA requirement and provide a safe environment for employees.	1. Worker compensation experience rating remains stable	1. Review annually
2. Provide appropriate safety training for key employees.	2. Absenteeism due to illness or work-related injury will be less than 2.5% annually.	2. Incorporated into orientation training of every employee.
3. Incorporate safety orientated goals into the annual employee evaluation process.	3. Accidents at POA facilities will be reduced.	3. Set goals in each annual review
4. Continue Flu Shot Program for employees. Add our experience with COVID-19 to our Disaster Management plan.		4. Ongoing
5. Review Dolphin Head Project for safety when completed.		5. Under construction

ASSUMPTIONS

As the Plantation infrastructures continue to age, there is an expanded need to monitor safety factors.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ADMINISTRATION

OBJECTIVE #3

Efficiency – Use current and future technology to automate POA services and increase efficiency while reducing costs.

STRATEGIES	MEASURE	STATUS
1. Explore using e-mail addresses for direct billing and other services.	As the population of the Plantation grows the need for additional administrative support will be absorbed through the use of technology.	1. Ongoing
2. Collect a single email address contact for each property on HHP.		2. 2024 – Ongoing with signup at orientation
3. Continue to upgrade software and hardware to keep pace with improvements in technology.		3. Evaluate new software annually
4. Use Web site E-forms to increase administrative efficiency.		4. Ongoing
5. Consider expanding credit cards for online class registration and other purchases.		5. Evaluate in 2024
6. Explore direct debit for payment of assessments.		6. Evaluate for 2024
7. Conduct the 2024 Survey online only		7. 2024
8. Upgrade printers for billing assessments.		8. 2024

ASSUMPTIONS

The Plantation has achieved defacto build out. This stabilized assessments, which mean there will be an increased need to emphasize efficiency, effectiveness, and to reduce costs.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ADMINISTRATION

OBJECTIVE #4

Training - Provide training to maximize staff efficiency and reduce outside consulting costs.

STRATEGIES	MEASURE	STATUS
1. Provide all personnel computer training as needed.	1. Outside consulting costs are reduced by 10%	1. Ongoing
2. Continue to provide professional development funds in operating budget for staff participation in applicable workshops, seminars, and conferences.	2. Minimize the need for additional support staff.	2. Ongoing
3. Make professional development an objective in employees' performance goals.		3. Ongoing
4. Explore Scheduling software.	4. Make staff more efficient.	4. 2024
5. Explore hiring an IT specialist to handle the organizations computer, hardware, software and training needs possibly in partnership with another /other local Community Associations.	5. Staff is hired	5. 2024

ASSUMPTIONS

1. Staff training improves morale, builds a team relationship, and improves quality service.
2. The need for consulting services will increase.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ADMINISTRATION

OBJECTIVE #5

Space - Provide adequate storage for POA data and equipment and provide a comfortable work environment for employees.

STRATEGIES	MEASURE	STATUS
1. Investigate latest technology for storing required paper records.	1. Reduce the need for paper storage.	1. Investigate in 2022
2. Evaluate appropriateness of office space.		2. Ongoing – 2022 thru 2026
3. Investigate storing Board packets as PDF files and placing them on the POAs server for easy access.		3. Investigate in 2022
4. Upgrade kitchen for storage and space		4. Schedule for 2022

ASSUMPTIONS

1. Present storage and workspace may not be adequate to meet objectives.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ARCHITECTURAL REVIEW BOARD (ARB)

OBJECTIVE #1

Communications – Develop understanding by homeowners and commercial vendors the importance of following our building procedures.

STRATEGIES	MEASURE	STATUS
1. Encourage residents and vendors to access the HHPPOA web for information regarding the building review, and approval process.	1. Staff liaison will provide checklists and applications for design concept, preliminary, and final review.	1. Ongoing
2. Communicate to property owners on timely topics via <i>Plantation Living</i> and through the General Manager.	2. Staff liaison provides topical write-ups to <i>Plantation Living</i> and General Manager	2. Ongoing
3. Inform residents and vendors of scheduled ARB monthly meetings.	3. Staff liaison encourages complete submissions of required plans and documents.	3. Ongoing
4. Communicate results of ARB meetings to those residents who submitted plans.	4. Staff liaison communicates results to vendors; encourages and offers advice for re-submittals.	4. Ongoing

ASSUMPTIONS

1. Residents will understand and follow the building procedures as stated in the ARB Rules and Regulations.
2. Vendors will support and comply with the ARB Rules and Regulations.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ARCHITECTURAL REVIEW BOARD (ARB)

OBJECTIVE #2

Enforcement – Assure compliance with the Covenants and/or ARB Rules and Regulations.

STRATEGIES	MEASURE	STATUS
1. Encourage residents and vendors to read the ARB Rules and Regulations for information regarding building and the review process.	1. Staff liaison explains procedures to avoid delay in building procedure.	1. Compliance will expedite the building process.
2. Reinforce the use of architects or professional designers for plan preparation.	2. Percentage of plans prepared by professionals.	2. Ongoing

ASSUMPTIONS

1. Residents will understand and follow the building procedures as stated in the ARB Rules and Regulations.
2. Vendors will support and comply with the ARB Rules and Regulations.
3. ARB will carefully review all submissions, granting exceptions only when necessary.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ARCHITECTURAL REVIEW BOARD (ARB)

OBJECTIVE #3

Governing Documents – Provide documentation of building and landscaping procedures to insure that ARB Rules and Regulations are supportive of and consistent with the Amended Protective Covenants.

STRATEGIES	MEASURE	STATUS
1. Review residents’ applications to ensure concise information concerning material required for review prior to ARB submission.	1. ARB will review submitted material and advise on how to proceed to next phase of the review.	1. Complete submissions will facilitate a final approval.
2. Inform residents and vendors of building checklists and inspection schedules required by the ARB to inspect on-site building activity.	2. Staff liaison will visit and document ongoing building progress.	2. Ongoing
3. A biennial review of Rules and Regulations recommend changes to the POA Board to be considered and adopted.	3. ARB develops recommendations to the POA Board of Directors to modify the ARB Rules and Regulations.	3. Regular review

ASSUMPTIONS

1. Well established governing documents supported by HHP and its residents.
2. Residents will understand and support the enforcement of these Governing Documents.
3. Vendors will support and comply with the ARB Rules and Regulations, knowing that non-compliance may result in the enforcement of other sanctions.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

ARCHITECTURAL REVIEW BOARD (ARB)

OBJECTIVE #4

Advice – Provide advice to owners, architects, and landscapers about how to improve submitted plans and how to enhance probability of approval by the ARB.

STRATEGIES	MEASURE	STATUS
<ol style="list-style-type: none"> 1. Review plan submissions for consistency, fit in the neighborhood and the Plantation, esthetics, and compliance with POA Rules and Regulations. 2. Provide constructive feedback to assure fit to owners, architects, and landscapers to enable them to modify plans toward obtaining approval – or so they understand why plans cannot be approved. 	<ol style="list-style-type: none"> 1. Fewer recycles of plans for review 2. Fewer rejections of plans 3. Owner, architect, landscaper satisfaction with the process 4. Lower workload for staff in processing repeat submissions 	<ol style="list-style-type: none"> 1. Ongoing



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

COMMUNICATIONS

OBJECTIVE # 1

Plantation Living – Continue to improve the value and readership of *Plantation Living* monthly newsletter.

STRATEGIES	MEASURE	STATUS
1. The Communications Committee will provide input to and offer recommendations for the content of <i>Plantation Living</i> and report its recommendations for any major changes.	1. Quarterly	1. Ongoing
2. The Communications Committee will review <i>Plantation Living</i> Advertising Guidelines and financials and report its findings and recommendations.	2. Monthly reports from Communications Coordinator	2. Ongoing

ASSUMPTIONS

1. *Plantation Living* will continue as a leading communication vehicle of the HHPPOA, communicating important information, Board deliberations, and Board issues that impact/affect property owners.
2. *Plantation Living* should fully serve the best interests of HHPPOA property owners.
3. The publishing and distribution of *Plantation Living*, to the extent possible, should be self-supporting.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

COMMUNICATIONS

OBJECTIVE # 2

Continue to optimize face-to-face communication between residents, staff, and Board of Directors as relevant and appropriate.

STRATEGIES	MEASURE	STATUS
1. Coffees with Peter, bi-monthly meetings with residents. Topics/speakers to be informative and timely. Key staff members and Board members should attend.	1. Evaluate resident attendance at such meetings, participation, and feedback.	1. Bi-monthly
2. POA Staff will hold annual meetings with property owners and residents.	2. Feedback from residents in attendance.	2. Annual
3. Annual Meeting in March	3. Successful completion of meeting (required by By-Laws).	3. Annual

ASSUMPTIONS

1. Although we must keep up with the latest communications technology (Internet, Email blasts, etc.), it is very important to maintain “human contact” with our residents, Staff, and Board of Directors.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

COMMUNICATIONS

OBJECTIVE # 3

HHPPOA Website – Increase the number of HHPPOA property owners using the Website as an important part of their communications process with the HHPPOA Board, its Standing Committees, and the professional Staff. Strive to make the Website a vital source of information for residents/staff.

Consider enhanced utilization of Website and Internet as supplemental mechanisms for communication between residents, Board of Directors, and Staff.

STRATEGIES	MEASURE	STATUS
1. The Communications Committee will continue to identify/evaluate improvements to the Website that will make it more attractive and user-friendly by providing data/functionality that will cause the Website to become the first source of information for residents/staff.	1. Discuss in Communications Committee meetings; gather resident feedback.	1. Quarterly or as defined

ASSUMPTIONS

1. Utilization of the HHPPOA Website continues to be a productive and useful tool in the process of communication between residents, Board of Directors, and Staff.
2. The HHPPOA Website should fully serve the best interests of HHPPOA property owners.
3. The value/use of the HHPPOA Website by property owners will increase when the content becomes valuable to them.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

COMMUNICATIONS

OBJECTIVE # 4

Continue to explore the use of multimedia to improve and/or expand communications between residents, Staff, and the Board of Directors, where appropriate. Consider the use of “alternate” electronic technologies (especially in future years, with rapidly changing technologies).

STRATEGIES	MEASURE	STATUS
1. Evaluate technologies as a means of communicating to residents.	1. Research feasibility and cost.	
2. Encourage the use of Instagram for sharing photos, news, advertising, events, etc.	2. Feedback from residents and advertisers.	
3. Investigate the ability to create a community app. and texting system.		

ASSUMPTIONS

1. To maintain our standing as the premier community on the Island, it is in our best interest to continue to monitor the use of the latest technology by the population in order to reach residents and others by utilizing the easiest and most widely accepted methods of communication.
2. Continue to update our current technology or replace it with newer technology that is cost-effective and suited to our needs.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

COMMUNICATIONS

OBJECTIVE # 5

Produce 2024 Resident Opinion/Demographic Survey. Produce 2027 Resident Opinion/Demographic Survey.

STRATEGIES	MEASURE	STATUS
<p>The Communications Committee – with input from all POA Committees – will provide content for and review of the triennial Communications Survey (summarized in <i>Plantation Living</i> with the full details available on the HHP Website or in hardcopy at the POA Service Center) for collecting residents’ demographic and interest data, review the tabulated data, and report its findings and recommendations.</p>	<p>Produce the 2024 Resident Survey.</p> <p>Begin in September/October 2023 to collect questions from Committees and formulate 2024 Draft to present to the POA Board.</p> <p>Survey to be published in <i>Plantation Living</i> in the April 2024 edition.</p>	

ASSUMPTIONS

The purpose of HHPPOA’s triennial Resident Demographic/Opinion Survey is to obtain demographic information from residents, as well as to ask their opinion on various topics and issues. Not only does this information aid the POA in many of their decisions, but it also serves to convey to residents that their feedback and participation is important to and welcomed by the POA. The Survey helps to foster community spirit and belonging.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

COMMUNICATIONS

OBJECTIVE # 6

Continue to optimize email blast notifications as a main source of communication between HHP POA Staff and residents. Increase the number of residents who subscribe to the email blast system.

STRATEGIES	MEASURE	STATUS
1. Remind Property Owners the importance of subscribing to email blast systems for urgent information, POA news and events, and a digital version of <i>Plantation Living</i> .	Research feasibility of signing up every property owner for email blasts.	Ongoing
2. Link our Website to every email blast.	Continue to evaluate strengths and weaknesses of current email blast company.	

ASSUMPTIONS

We currently have roughly 5,616 residents signed up for our email blast notifications. Signing up for email blast notifications is voluntary. It is crucial to stress the importance of being on the list for important information.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

**COVENANTS
OBJECTIVE #1**

COMMUNICATIONS – Communicate, educate, and increase HHP residents’ awareness of both the Covenants and Rules and Regulations.

STRATEGIES	MEASURE	STATUS
1. Use cost effective media (<i>Plantation Living</i> , HHP web page, printed) to inform residents of Rules and Regulations, other Covenants issues, and most frequent violations: people, pets, parking, mailboxes, etc.	1. Staff liaison writes monthly articles for <i>Plantation Living</i> and monthly Covenant Activity Reports on actual incidents and trends in violations.	1. Ongoing
2. Cover Covenants and Rules and Regulations issues with residents at Coffee with Peter.	2. Post current information on agendas and meeting minutes.	2. Ongoing
3. Allow residents to report on non-compliance of Rules and Regulations.	3. Staff follow up with residents or compliance.	3. Ongoing
4. Periodically distribute revised Rules and Regulations in both electronic and printed format.	4. Email blast annually on certain issues.	4. Ongoing
5. The Rules and Regulations are included when registering a new resident. Annual meetings for newcomers.	5. In person registration	5. Ongoing

ASSUMPTIONS

1. Residents need and appreciate ongoing dialogue concerning Rules and Regulations and compliance.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

**COVENANTS
OBJECTIVE #2**

ENFORCEMENT – Identify violations and enforce Covenants and Rules and Regulations.

STRATEGIES	MEASURE	STATUS
1. Once each calendar quarter, each Committee member will visit their assigned area and report on properties believed not in compliance.	1. Committee members will submit their findings to POA Staff.	1. Ongoing
2. Staff liaison will visit the properties and validate reported violations.	2. Covenants Activity Reports.	2. Ongoing
3. Staff liaison will contact residents to resolve violations.	3. Staff liaison will monitor-violation resolutions	3. Ongoing
4. Review violation trends for consideration of (A) changes of procedures or (B) modification to Rules and Regulations.	4. Staff liaison will report trends in monthly Covenants Activity Reports.	4. Annually

ASSUMPTIONS

1. Need to address unconcerned owners (absentee, second home or foreclosures) or tenants who do not know or care.
2. Aging properties require higher maintenance.
3. Inability of some owners to maintain their property due to resident or economic circumstances.
4. Contractor compliance issues rise with renewal activity and flagrant parking issues (commercial vehicles, boats, frequent violations, etc.)



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

COVENANTS

OBJECTIVE #3

WRITTEN – Provide written recommendation to the HHPPOA Board of Directors to insure that the Rules and Regulations are supportive of and consistent with the Amended Protective Covenants and meet the needs of HHP and its residents.

STRATEGIES	MEASURE	STATUS
1. Review Covenants Activity Reports to determine possible needs for changes to Rules and Regulations.	1. Committee conducts detailed review of Rules and Regulations.	1. Review annually
2. Review Rules and Regulations and submit recommendations for changes to Board of Directors taking into consideration changing needs of HHP’s population, community and POA organization.	2. Develop recommendations to Board of Directors for modifications to Rules and Regulations.	2. Review when needed

ASSUMPTIONS

1. Well established and consistently enforced Rules and Regulations enhance property values.
2. Residents support enforcement.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

FINANCE

OBJECTIVE #1

Maintain property owner assessments and other income at a level consistent with maintaining HHP as the premier residential community in the Lowcountry. Provide oversight so that the Plantation’s finances will be implemented and managed in a value driven and cost-effective manner.

STRATEGIES	MEASURE	STATUS
1. Recommend to the Board a balanced annual budget as developed by the staff - planned income equals planned expense. Reducing year-end cash to cover a budget shortfall will not be implemented.	1. Review the Budget Guidelines at the beginning of each budget creation cycle and make any recommendations to the Board. Review the annual budget prior to Board review and approval and make any recommendations.	
2. Provide continuing oversight of revenue and expenses versus budget.	2. Review revenue and expenses versus budget on a monthly basis to verify compliance and identify trends.	
3. Seek ways to lower operational costs.	3. Review feasibility of concepts as identified and developed. Recommend possible changes to the Board.	

ASSUMPTIONS

1. Services and amenities provided, and staff levels will continue at current levels.
2. Future economic conditions may assert downward pressure on some non-assessment revenues.
3. Cost of operations and maintenance will continue to rise.
4. Damage repair from a major storm or series of minor storms will tax reserves.
5. In the event of a named storm, assistance from the Town of HHI and FEMA will be similar to the assistance received post-Matthew in 2016.
6. The privately-owned golf clubs and other commercial enterprises will remain going concerns and continue to contribute to assessment income through this planning period.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

FINANCE

OBJECTIVE #2

Avoid special assessments by ensuring that adequate funds are available in the Major Repair and Replacement and Weather Casualty funds, confirm that suitable lines of credit are maintained, monitor risk elements, and provide recommendations to the Board.

STRATEGIES	MEASURE	STATUS
1. Provide on-going oversight of all reserve funds, including funds held in a separate line item, the operating fund and established credit lines.	1. At the end of each fiscal year recommend the allocation of any Operating Fund balance in excess of \$300,000 to one or more reserve funds, per the then current situation. Review reserve funds status on a quarterly basis. Review invested funds with our advisor annually.	
2. Provide oversight for planned repair and replacement and capital expenditures.	2. Review annual proposed repair and replacement and capital expenditures budgets and make any recommendations prior to Board review and approval.	
3. Review approved Repair and Replacement and the Capital expenditures project expenditures.	3. Review expenditures relative to budgeted funds quarterly.	
4. Periodically investigate potential POA revenue generating initiatives.	4. Provide any recommendations to the Board.	
5. Monitor risk elements	5. Review insurance coverages and any special situations annually and make recommendations to the Board.	

ASSUMPTIONS

1. Aging infrastructure will require continual repair and upgrade.
2. Costs of operations will increase over the planning period due to inflation and changing economic conditions.
3. The Capital Transfer Fee will provide at least \$350,000 annually through 2026.
4. The national economy may experience varying degrees of inflation and changes in business cycles that the Committee will monitor and make recommendations to the Board as appropriate.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

FINANCE

OBJECTIVE #3

As directed by the Board, review existing financial controls and investment policies, and make recommendations to the Board as needed.

STRATEGIES	MEASURE	STATUS
<ol style="list-style-type: none"> 1. Periodically review current financial policies and recommend revisions to the Board as appropriate. 2. Periodically review current internal financial controls and recommend revisions to the Board as appropriate. 3. Optimize investment results consistent with the existing Investment Policy. Recommend any changes to the existing Investment Policy as appropriate. 	<ol style="list-style-type: none"> 1. Attend and provide comments as appropriate at the annual pre-audit and audit review meetings 2. Schedule review with staff in odd numbered years or as required. 3. Obtain stable returns while meeting risk limitations as stated in the existing Investment Policy. Evaluate and recommend any changes to the Board. 	

ASSUMPTIONS

1. Preservation of assets is the primary responsibility.
2. Changes in internal financial and external economic conditions and government regulations may require practices and policies to be updated.
3. Interest rates on invested funds will remain low.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

FINANCE

OBJECTIVE #4

Support the Board in the annual independent audit process. As directed by the Board, review and recommend revisions to the contracting process of hiring the independent auditor.

STRATEGIES	MEASURE	STATUS
1. Recommend any specific controls to be addressed in the annual audit process to the Board.	1. Make any recommendations prior to the pre-audit meeting with the Board.	
2. Monitor the annual audit process.	2. Attend the annual pre-audit meeting, any special meetings and audit results report meeting with the Board and Staff. Review annual audit record keeping proceedings, including actions and recommendations, annually.	

ASSUMPTIONS

If the same auditing firm is employed for more than five years, the lead auditor will be changed every five years.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

MAINTENANCE

OBJECTIVE #1

Review the condition of each of the following six community asset classes and make recommendations for changes and/or improvements of planned or necessary maintenance programs where appropriate:

1. Common POA Property and Conservancies
2. Structures such as Plantation House, Spring Lake Complex, new Dolphin Head Pavilion and other buildings
3. Roads and Leisure Paths
4. Lagoons and Lakes
5. Drainage System
6. Dolphin Head Recreation Area, Pine Island and extended Shoreline, including the Bluff revetments and salt marshes

STRATEGIES	MEASURE	STATUS
1. One or two members of the Maintenance Committee will be assigned to one of the geographic areas within the Plantation to make annual property inspections and report findings.	1. Assignments were made for 2022; reports are scheduled beginning with the September committee meeting.	1. Review annually
2. At the monthly meetings, the Committee members will review the ongoing maintenance schedule and practices as it applies to six asset classes listed above.	2. Review maintenance schedule and results in each asset class at the monthly committee meetings. Make recommendations for modification of the schedule or practices as appropriate.	2. Review beginning fourth quarter of 2022
3. Identify other communities in our area with similar characteristics and initiate benchmark programs to compare the maintenance of HHP's six asset classes with the other communities over the next five-years.	3. Adopt comparison categories for each strategic asset class.	3. Review beginning fourth quarter of 2022

ASSUMPTIONS

The Committee currently uses a six-area basis for property inspections, (e.g., one or two committee members reviews an area using the six asset classes).



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

MAINTENANCE

OBJECTIVE # 2

Gauge customer satisfaction from neighborhood surveys, monitoring of feedback submitted to the POA Board or submitted to the General Manager/Director of Maintenance regarding each of the six community asset classes and recommend actions as appropriate.

STRATEGIES	MEASURE	STATUS
1. Use the triennial resident survey and input from the Communications Committee to gather information.	1. Previously applied customer satisfaction measures are in place.	1. Provide questions related to community maintenance of POA assets for use in the triennial resident survey next planned for 2024.
2. Use multiple sources to obtain customer feedback and gauge satisfaction.	2. Information may be obtained from response to articles in the <i>Plantation Living</i> newsletter, website surveys, Coffee with Peter meetings, sign boards, and periodic pre-and post-personal interviews.	2. Use Plantation newsletter to update residents on actions taken relating to property maintenance.
3. Regularly review satisfaction.	3. Work with the Communications Committee to utilize the Plantation website to elicit and accept resident input.	3. Evaluate resident feedback as appropriate.

ASSUMPTIONS

1. The customers are property owners (residents) of HHP.
2. Communications Committee will support the Maintenance Committee.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

MAINTENANCE

OBJECTIVE # 3

Review the five-year list of Capital Improvements that is brought to the Maintenance Committee by the General Manager/Director of Maintenance. Make recommendations for any change in the maintenance requirements against constraints (e.g., budget, manpower, conflict with other projects or contracted services) and provide recommendations to the POA Board.

STRATEGIES	MEASURE	STATUS
1. Continue the annual process for review of Capital Improvements that is currently being used.	1. Review Capital projects at monthly committee meetings, as required, and conduct an Annual Review of the overall Capital Projects list.	1. Review annually beginning in third quarter 2022.

ASSUMPTIONS

1. The annual Capital Improvement list will be used as a starting point for this review
2. The budget for and disbursement of funds from the existing Repair and Replacement Fund will be handled by HHPPOA staff and management.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

MAINTENANCE

OBJECTIVE # 4

Review the Storm Water Management Agreement between HHPPOA and the Town of Hilton and provide recommendations to the POA Board regarding renewal, modification of terms, and value received from this agreement annually.

STRATEGIES	MEASURE	STATUS
1. Monitor the effectiveness of the Storm Water Management System annually.	1. Update the Storm Water Management System Map as appropriate, highlighting water sheds to major outfalls.	1. Highlight locations on the map displaying the interaction between golf course drainage and lagoons leading to the major outfalls.
2. Review Agreement with Town of Hilton Head to verify that it covers priorities established by HHPPOA for the upcoming performance period.	2. Review Agreement for compliance relative to priorities and data generated by the Map.	2. Monitor annually and report any response from the Town to POA Board
3. Monitor value received from Agreement with Town of Hilton Head.	3. Review report from the Town regarding the cost of projects completed. Share the System Map with the Town to assure clarity of responsibilities of each party. Work with HHP staff and Town representatives to reserve funds anticipated to address drainage projects identified by the Map.	3. Monitor annually and report replies from the Town
4. Prepare annual action plans to address any deficiencies found from items 1-2 above.	4. Present annual plans to HHPPOA Board for approval.	4. Monitor progress of work on approved plans and report completion of projects

ASSUMPTIONS

1. The POA and golf course maintenance managers, in concert, continue to monitor all lagoons.
2. The Map prepared and maintained by HHPPOA Staff is effective and acceptable to the Town as a description/status update of the HHP storm water system.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

MAINTENANCE

OBJECTIVE # 5

Participate in the annual area maintenance audit and Identify signage improvements, landscaping options for beautification of entry ways, roadsides, and other common use areas that can be implemented in a sustainable manner.

STRATEGIES	MEASURE	STATUS
1. Review projects brought forward to the Maintenance Committee.	1. Recommend acceptance or rejection of proposed projects based on cost, upkeep, savings, etc.	1. As needed to provide application clarity
2. Develop a prioritized list of approved projects showing the value proposition for each project and anticipated costs/savings over time.	2. Update the list for new or changed projects	2. Annually in timely fashion for Maintenance Committee operating plan process
3. Add a “Beautification and Sustainability” value question to community survey.	3. Maintenance Committee working in cooperation with the Communications Committee	3. Monitor annually with survey results; reevaluate the proposed projects, the definition of terms and value proposition for each project

ASSUMPTIONS:

Work to achieve community agreement and understanding around our definition of terms and the resulting value proposition for each project.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

MAINTENANCE

OBJECTIVE # 6

Develop a long-range maintenance plan for the new Dolphin Head Recreation Area.

STRATEGIES	MEASURE	STATUS
1. Follow the process used to develop the maintenance plan for Spring Lake Pool and apply it to the new Dolphin Head Recreation Area.	1. Review any staff and cost changes during the first year (warranty period) then again in subsequent years. Integrate the new Dolphin Head Recreation Area into the three-year POA neighborhood survey.	1. Update annually during the first two years



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

MAINTENANCE

OBJECTIVE #7

Work with the Town of Hilton Head Island to develop a long-range dredging schedule for the lakes and lagoons located within the boundary of HHP.

STRATEGIES	MEASURE	STATUS
1. Proposed a long-term plan for dredging community lakes and lagoons within HHP.	1. Review one year after agreement with the Town; in subsequent years review every three-years when the POA neighborhood survey is conducted.	1. Update annually
2. Develop an ongoing plan to stock and maintain the HHP lakes and lagoons with plant eating Carp fish.	2. Review annually with input from the HHP Fishing Club and experts from the South Carolina Department of Natural Resources.	2. Update annually



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

**RECREATION
OBJECTIVE #1**

Review existing recreational programs to keep them interesting, stimulating, and adaptive to our changing needs.

STRATEGIES	MEASURE	STATUS
1. Review and analyze the HHP 2024 Survey responses and the HHP 207 Survey responses to anticipate changes and needs in recreation.	1. Survey results will serve as the measure	1. Completion - 2022 and 2025 respectively
2. Based on Survey, analyze recreational trends and make recommendations to POA Board.	2. Opinion Survey and resident input.	2. Completion - 2022 and 2025 respectively
3. Research and evaluate the variety, effectiveness, and level of participation in programs and produce matrix listing all programs for the Board.	3. Subcommittee Report	3. Review annually
4. Encourage volunteerism.	4. Review # of guests invited to Volunteer Party.	4. Review annually
5. Review staffing and volunteer needs.	5. Review monthly management reports.	5. Review annually
6. Introduce new programs and activities.	6. Resident Input	6. Review annually
7. Support the formation of new HHP Clubs.	7. Resident Input	7. Review annually

ASSUMPTIONS

Many residents are involved in various HHP recreational programs. The HHP survey's results indicate a continued and increase interest and need for recreational activities.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

**RECREATION
OBJECTIVE #2**

Inspect and evaluate existing recreational facilities to ensure that they are properly equipped, well-maintained, and suitable to the changing needs of our residents.

STRATEGIES	MEASURE	STATUS
1. Research community to determine if a new or renovation of a facility is required to meet resident’s needs for meeting and athletic uses.	1. Surveys – 2024 and 2027	1. Completion 2024 and 2027
2. Explore private industry / HHP partnership opportunities to enhance recreational opportunities.		2. Review annually
3. Maintain interior of present facilities (excluding major mechanical items) at least at current level.	3. Meet and inspect interior of facilities	3. Review Periodically

ASSUMPTIONS

Many residents presently use available facilities. The HHP Opinion Survey indicates an even greater need for enhanced facilities.

- Facilities are aging and may become outdated and may need replacing or refurbishing. Preventive maintenance is critical.
- Recreational trends will continue to evolve and may suggest a need for updated/additional facilities.



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

RECREATION

OBJECTIVE #3

Consider the need for Phase IV of the Spring Lake Master Plan, the renovations/replacement of the Plantation House, the second phase of the Dolphin Head Recreation Area project, and other Capital Projects that are desired by the community.

STRATEGIES	MEASURE	STATUS
1. Obtain resident feedback.	1. Survey 2027	1. Completion 2027
2. Evaluate the Plan and recommend a course of action to the Board of Directors.	2. Evaluation of Plan completed	2. Completion 2027
3. Work with the Finance Committee to develop a financial plan to fund project.	3. Financial Plan completed	3. Completion 2028

ASSUMPTIONS

Community supports the need for Phase IV of the Spring Lake Master Plan, as well as renovating or replacing the Plantation House, the second phase of the Dolphin Head Recreation Area project, and other Capital Projects that are desired by the community; the plan is endorsed by the Board.

- The Dolphin Head Recreation Area is paid off by 2025

Members will enjoy the additional recreational amenities and demand for use will outgrow the available facilities.

(*Phase IV of the Spring Lake Master Plan – Removing the Shuffleboard Courts and replacing them with two Bocce Ball Courts. Keep practice tennis wall.)



**HILTON HEAD PLANTATION
STRATEGIC PLANNING**

2024 – 2028

SECURITY AND SAFETY

OBJECTIVE #1

Personnel – Maintain a competent, well-trained staff capable of effectively and efficiently addressing routine duties and issues, as well as handling new challenges and situations.

STRATEGIES	MEASURE	STATUS
1. HHPPOA monitor and maintain compliance with SLED training standards and protocols.	1. Security review for compliance with SLED performance standards. Semi-annual report status to Security Committee.	1. Ongoing and Semi-annually
2. Review and update as necessary SOPs (Standard Operating Procedures).	2. Security maintain SOPs current. Report status to Security Committee Semi-annually.	2. Ongoing
3. Develop plans for retention of Security Department personnel including compensation reviews, awards, training, leadership development, and working conditions.	3a. Security to report on staffing levels monthly to Security Committee.	3a. Monthly
	3b. Security Committee to review compensation and awards annually.	3b. Annually prior to Budget requests.
	3c. Security Committee review working conditions Semi-annually. As necessary, seek Board support and approval of plans. Keep salary levels competitive.	3c. Semi-annually



**HILTON HEAD PLANTATION
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SECURITY AND SAFETY

OBJECTIVE #2

Crime Prevention – Minimize the incidences of crime in HHP.

STRATEGIES	MEASURE	STATUS
1. Continue residents' education to aid in minimizing crimes of opportunity.	1. Publish statistics raise resident awareness through <i>Plantation Living</i> , coffees, emails, etc.	1. Ongoing
2. Review crime statistics to evaluate the effectiveness of the HHP crime prevention program.	2. Report crime statistics showing trends. Compare statistics month to month and year to year in HHP.	2. Ongoing



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SECURITY AND SAFETY

OBJECTIVE #3

Traffic Safety and Control – Maintain efforts to reduce the number of traffic accidents, minimize traffic congestion.

STRATEGIES	MEASURE	STATUS
1. Analyze accident data to pinpoint enforcement, education, equipment, and engineering needs.	1. Annual report by Security Committee.	1. Annually prior to Budget requests.
2. Improve resident awareness of traffic speeding by use of Radar Speed Signs.	2. Post Radar Speed Signs as necessary.	2. Ongoing
3. Review equipment and technology which can improve traffic safety and control.	3. Semi-annually report to Security Committee.	3. Semi-annually
	As necessary, seek Board support and approval of plans.	



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OBJECTIVE #4

Resident Assistance – Maintain a high level of service for resident assistance.

STRATEGIES	MEASURE	STATUS
1. Maintain strong relationship and high level of service in response to resident and BCSO requests.	1. Monthly report to Security Committee.	1. Monthly
2. Educate residents via <i>Plantation Living</i> concerning animal issues.	2. Routine <i>Plantation Living</i> articles on animal issues.	2. Ongoing
3. Inform residents of Security programs and methods available. Lockbox, Vacation House Checks, etc.	3. Presentation at a meeting of the Newcomers Club; Coffees (as invited), and <i>Plantation Living</i> .	3. Ongoing

ASSUMPTIONS

Resident calls for assistance will continue to increase, further stretching Security Department resources. This type of non-law enforcement service is uncommon and further enhances the uniqueness of the HHP Security Department. The types and extent of services provided should be evaluated on a cost/benefit basis.



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OBJECTIVE #5

Operational Efficiency – Monitor and review new technologies, operational equipment and facilities assets to cost effectively enhance the success and safety of the Security Department personnel.

STRATEGIES	MEASURE	STATUS
1. Systematically survey and review operations to pinpoint areas for improvement.	1. Security operational reviews and technological advances examined.	1. Ongoing
2. Evaluate new systems and enforcement techniques such as technologies, equipment, facilities, systems, vehicles, etc.	2. New approaches brought to Security Committee for initial evaluation of possible HHP use.	2. Ongoing
3. After a new system/technology is identified as potentially of use in HHP, develop and recommend an action plan based upon needs, priorities, time savings, and both practical and financial feasibility.	3. In-depth evaluation and report to Board of Directors/General Manager for funding.	3. Ongoing
4. When an item from #3 is funded, make periodic reports to the POA Board on progress of its implementation.	4. Implementation of approved projects.	4. Ongoing

ASSUMPTIONS

Ever changing technologies require continued evaluation.



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OBJECTIVE #6

Disaster Response – Maintain and constantly review an adequate Disaster Response Program for both man-made and natural disasters and a Hurricane Evacuation and Re-entry Plan (training, procedures, required equipment, facilities, etc.).

STRATEGIES	MEASURE	STATUS
1. Review current State, County, and Town and HHP procedures to identify possible shortcomings and improvements in the current HHP plans.	1. Security to report results to General Manager, Security Committee, and to Board of Directors as warranted for funding.	1. Ongoing
2. Communicate Disaster Preparedness advice to residents.	2. Security conduct meetings to present Disaster Response advice and overview Hurricane Evacuation and Re-entry Plan.	2. At least annually



Hilton Head Plantation Property Owners' Association

Strategic Plan 2024 – 2028

APPENDIX B

Operating Budgets

Pro forma operating budgets for the period 2024 – 2028 will be provided by the Assistant General Manager.



Hilton Head Plantation Property Owners' Association

Strategic Plan 2024 – 2028

APPENDIX C

Capital Requirements

Pro forma capital requirements for the period 2024 – 2028 will be provided by the Assistant General Manager.