Long Range Planning
Focus Group Assessments
Summary Report

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As part of Heritage Palms continued long range planning activities, nine focus group sessions were held over three dates (November 19, 21, December 3) to gather additional member information beyond the LRP survey and town hall meetings. Dr. Jerry Schoenfeld from Florida Gulf Coast University’s (FGCU), Lutgert College of Business facilitated these focus group sessions. To ensure broad representation of the membership in the focus group sessions each Neighborhood Association was requested to choose three directors (or designated association representatives) to participate. In addition, these representatives were encouraged to speak with fellow members of their Neighborhood Association and gain their input prior to their focus group session.

Each focus group session was attended by between 10 and 17 members who were asked to come to their session prepared to discuss the following four questions.

1. How should the Club best meet the evolving needs of current and future members for fitness and wellness activities?

2. How can the Club meet members’ increasing desires for casual dining while maintaining a formal dining experience?

3. As the interest and demand for a variety of activities continues to grow, is there a need and desire for greater dedicated meeting space?

4. At what level and manner would members’ prefer to pay for desired member driven capital improvements?

Participants were encouraged to voice their opinions in the sessions and were assured that all comments made would be noted at an aggregate group level only. A diversity of viewpoints was welcomed. The following key findings are organized on the main topics of a Grill Room/Casual Dining, an Activities Center, and Capital Improvement Financing.

**Key Considerations Suggested:**
- Need unified Board voice on any proposals.
- Any proposal should be kept simple and easily understood.
- Need to explain the member value of any capital improvements
- Give members options and present pros and cons of each option.
- Solicit member feedback on any proposed capital projects.
- Need to benchmark other area Clubs and educate members on what other Clubs have done. Perhaps use Neighborhood Association reps as part of this process of benchmarking.
- Would like to know what are the key trends in Clubs. Is it fitness? Is it Pickleball? Is it bike paths? etc.
• Assure members that issues with past project (e.g., decorating concerns in the Lodge) will not be repeated in these future projects
• Why do current members leave? Is due to facilities, costs, etc.?
• Any changes should be done to meet the long term needs necessary to keep community viable and attractive to future members.
• Any changes should be part of a comprehensive long range plan. Done right the first time for the long term. Not a Band-Aid approach.
• On-going communication and education is essential throughout this process.

Grill Room/ Casual Dining:

Consistent with the LRP survey, there was strong interest among focus group participants in having a casual dining option at Heritage Palms.

1. Pro Shop Location
   + Close to golfers coming off courses
   - Would it need its own kitchen?
     - If using current kitchen to service this location, it would be undesirable to have servers continually going across lobby to deliver meals. Safety issue as well.

2. At Current Pool
   • Create new pool at practice green

3. Current Bar Area (Most commonly mentioned desired location)
   + Could incorporate current bar to become a casual dining/ sports pub.
   + Could enclose current outside dining space but with screens to allow alfresco dining
     - Would this location necessitate the need for a separate bar for dining room?
   • Could be a dedicated space with a solid wall separating it from the dining room. Would allow for entirely separate décor. Would allow for casual dining to be available during dining room events.
   • Alternatively, could have a temporary wall that would allow use of space during dining events? Would remain similar to current setup. Would be lower cost alternative.

4. Other Related Concerns
   • Even if called casual dining, there should still be a TBD dress code.
   • Do it right the first time. Make it aesthetically appealing and a desired location to hang out.
   • Need to build to control for noise across both dining rooms (casual/ formal). Also, there are noise issues from the AC units with outside dining.
   • Casual dining should have a separate direct entrance.
• Can/should utilize community expertise in interior look/design features. Include member input.
• What will be the planned hours? Desire open during golf hours. Desire open seven days a week. Desire open when events are being held in dining room. Desire open all year.
• What is the desired size? 120 – 150 seats?
• What will be on the menu?

5. Formal Dining
• If casual dining was built to be a dedicated space would there be a need to recapture lost seating for formal dining?
• Would expansion need to go through current pro shop location or could it extend slightly outward?
• Regardless of any change to formal dining, special events would still need to remain at 2 nights.
• With the addition of a casual dining option, should the dining room be remade to be a more formal country club atmosphere?

6. Kitchen Expansion
• Would number of meals served daily increase with the addition of a casual dining facility? Some overlap with current lunch meals served in dining room.
• Can/should we consult with a kitchen space utilization expert to determine need for enlarged kitchen?
• If expanded, could it be built out toward current garbage bins versus current meeting room/library?

Activities Center:

Among focus group participants who desired enhancements to fitness, there was a desired that any new fitness space also include space for other Club needs. These include more meeting rooms, card rooms, library, and administrative offices. An activities center with a broad array of rooms and services would better meet the diverse needs of the membership.

1. Improve current fitness utilization
• Need to look at utilization from a historical use perspective by dates and times. However, past utilization analysis would not capture those members who chose not to use current facility but would use a new fitness facility.
• Busy only during morning hours, during season.
• Could a Chelsea type system be used in fitness to better spread out usage?
• Could expand current footprint slightly by going into rarely used locker room space (not bathroom space).
• Could have better sequencing of classes to facilitate parking issues.
+ Would be low cost alternative
- Current space is crowded with equipment.
- No room in current space for stretching.
- Strength and cardio and fitness classes in separate locations.
- Fitness classes are overcrowded, even before season. Safety issue due to lack of space to move in classes.
- Fitness class floor is multipurpose flooring not ideal for fitness class activities.
- Ventilation issues at Lodge for fitness classes.
- Lacks aesthetic appeal.
- Not competitive with newer communities and those who have recently redid their fitness facility.
- Need to look at not only current members’ utilization but also a facility that will attract new members. However, currently attracting new members has not been an issue. Will it be an increasing issue of concern going forward without a change to fitness?

2. Current Cart Barn
- Not a desirable location due to recent investment in cart barn renovations. May have impacted view on survey of proposed capital projects as much as total cost.
- If cart barn renovations could remain intact then there could potentially be interest in a second level fitness facility.

3. Between Cart Barn, Lake, and Condos
- Is there space for a building in this location?
- Would lose some current parking
+ Good view of lake.

4. Off-site fitness facility (Winkler)
- Would be cohabitating with other businesses in a public plaza.
- Out-of-sight, out-of-mind.
- Not central to community
- Not desired

5. Purchase tangential land to build on
- Out-of-sight, out-of-mind.
- Not central to community
- Not desired
- Would add to the cost of any project
+ Could use land to move all racquet activities.

6. Lodge Location
- Could be expanded due to adjacent buildable land. How big could this new structure be? Would the current building be expanded or knocked down? Could lake be reconfigured to extend in that direction?
+ Utilities already hooked up to site.
+ Could be potentially cheaper than building by Pickleball courts.
- Parking would be a concern. How much new parking would any construction at the lodge location create?
- What would be impact on the tenth hole?
- Would not be at center of community
- Single family homeowners do not favor expansion at the Lodge due to parking and traffic concerns.

7. **By current Pickleball Courts/Putting Green**
   - Could build a new facility that is multiple stories. Could have space for multiple purposes and future needs.
   - What would happen to Lodge space?
   - Where does Pickleball go?
   + Would be centrally located
   + Would create more available parking at Clubhouse
   + Would this location have less permitting issues?
   - Would there be sufficient parking? Would members go to this Activities Center by walking and biking? Could the first floor be parking?
   - What would be impact on aesthetic appeal of entering the community and driving through majestic palms to Clubhouse?
   - Is this a more costly option?

8. **Other**
   - Need to make sure we have well maintained and latest equipment (even in current space).
   - What is the desired size for a fitness center and aerobics classroom? Based on expected use and aesthetic appeal.
   - Need to benchmark other Clubs both new and those who went through recent renovations/additions to their fitness centers.
   - Could/should it include space for rehabilitation/wellness services provided by an outside vendor? What would be the insurance/liability issues?
   - Do it right the first time. Make it aesthetically appealing.
   - Could we have a new fitness center open to outside use during non-peak/off-season times for a fee similar to what is done with golf and tennis?

**Pro Shop:**
- Not driving need but could be part of overall capital projects (domino impact).
- Could be moved to current fitness center. Create more room for pro shop staff, storage, golf club displays etc.
- Could also move to new Activities center if by Pickleball courts.
Financing:

- What will be the value received versus cost at different price points? (6 million, 8 million, 12 million, etc.)
- Must justify any proposal as being good value and beneficial.
- Does an increase in annual assessment/dues price the community out for some current members? At what increase level does the community become less attractive to potential new members versus other communities?
- Time period of 15 years is too long. Renovations on new facilities would need to be made before the original construction was paid off.
- What impact would a phased construction approach have on the overall costs? Would it be cheaper or more expensive?
- How to ensure construction costs in the planning process? Need a realistic budget. Need to assure that there will not be cost overruns. Can we get design and build commitments?
- What are pros and cons of assessment versus loan?
- Payment options are desired. One time, two payments, monthly.
- 7-8 million most often mentioned as a price point. $30 – 40 per month. Others Ok with $50 per month, others feel any increase unacceptable.
- Need to look at these project costs in relation to any foreseen changes in Association dues.
- What will be the on-going operational costs of these enhancements?
- What will be the impact on property values?

Other viewpoints:

- Golf is and should remain the number one amenity and priority at Heritage Palms.
- Maintaining aesthetics of current grounds and facilities should remain an on-going focus.
- Can current dining be open more evenings and hours?
- Sound issues in current dining room.
- Can/should there be multiple seating for evening dining?
- Consider crossover with Sabal like with Royal. This could increase tee times by 25%. Would there be sufficient parking? What impact would this have on insurance and liability?
- Tiki Bar is a popular location. Can this be expanded (patio/ kitchen space)?
- Can there be a shuttle from Clubhouse to Tiki bar on Friday evenings?
- Members are staying at Heritage Palms longer. Need services to meet needs of members beyond season.
Conclusion:

As indicated in the focus group findings above, there are a number of issues and questions that will need further exploration and planning. While there are some members of the community who do not desire any change or only change accomplished through current assessments/dues, the majority of focus group participants are in favor of some capital enhancements to the Club. The challenge is to determine at what level of enhancements would be supported at the level necessary for approval. Focus group participants did an excellent job of soliciting the input of their Neighborhood Association members prior to attending the focus group sessions to better represent a broader viewpoint of the overall Heritage Palms membership. It is clear that there is the strongest support for a dedicated casual dining/pub facility at the location of the current bar area. Participants were open to the idea that this may result in the need to expand the kitchen but would like expert opinion driving this decision. There is also interest in a multipurpose activities center if done at a reasonable cost. This would allow for a modern fitness facility to house both strength and cardio along with fitness classes, provide additional meeting/card space, a library, and perhaps administrative offices. There are pros and cons associated with the top two locations of the Lodge and by the Pickleball Courts. More analysis, solicitation of member input and communication would help to clarify this choice.

Ultimately, any capital improvements should be part of a long range plan that provides value versus cost to current and future members. These focus group sessions have furthered the process along beyond the LRP survey and town hall meetings. Greater clarity of member interests were gained and a number of important questions were raised that will facilitate the development of any future proposal.