



**Hilton Head Plantation
Property Owners' Association**

**Executive Summary of the Strategic Plan
2024 – 2028**

January 24, 2023



Hilton Head Plantation Property Owners' Association

Strategic Plan

2024 – 2028

I. Introduction	3
II. Historical Perspective	4
III. Strategic Planning Process	5-6
IV. Vision, Assumptions and Priorities	7-8
V. Goals and Objectives Summary	9
A. Administration	10
B. Architectural Review Board	11
C. Communications	12
D. Covenants	13
E. Finance	14
F. Maintenance	15
G. Recreation	16
H. Security	17
VI. Communicating the Strategic Plan	19



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@hppo.org

Your Comments:

The following information is optional:

Name: _____

Address: _____

Phone: _____

Email address: _____