



**Hilton Head Plantation  
Property Owners' Association**

**Strategic Plan  
2026 – 2030**

**January 28, 2025**



# **Hilton Head Plantation Property Owners' Association**

## **Strategic Plan**

**2026 – 2030**

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# Hilton Head Plantation Property Owners' Association Introduction to the Strategic Plan 2026 – 2030

**TO:** Hilton Head Plantation Property Owners and Residents  
**FROM:** Carlton Dallas, HHPPOA President  
**DATE:** January 28, 2025

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 2026 - 2030. 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, Margie Lechowicz for her 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 HHP. 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 our community. 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 HHP. 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, 2022, and 2024.



### **III. The Strategic Planning Process 2026-2030**

In May 2024, 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 2024 and provided further insight for the long-range planning process. The Strategic Plan was approved by the POA Board of Directors at its January 2025 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 2026-2030 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 2026-2030 Strategic Plan**

1. We should continue to be good stewards of our habitat.
2. We should provide a safe and secure environment for all residents, staff, and guests.
3. We should continue to ensure that our policies/procedures and Rule and Regulations are applied with consistency.
4. We should maintain sound fiscal policies.
5. We should continue to improve communications among HHP Board, staff, residents, and the HHI community.
6. We should continue to improve the utility of existing recreation and POA facilities.
7. We should continue to find ways to implement green technologies.
8. We should continue to adapt to changing technologies.
9. We should continue to enhance our recreation and education programs to appeal to our diverse population.

## **Potential Major Capital Projects Identified for the Years 2026-2030**

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 to include the installations of groins.
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 to include the Plantation House, the Security Gates, and the Spring Lake Recreation Area's bocce and racquet 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, and Maintenance 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.
4. For Security
  - a. Continue to provide exemplary service and incorporate advances in technology and best practices.
5. For Recreation and Communications
  - a. Continue to be creative, innovative and responsive in enhancing respective services to residents, leadership, volunteers, and staff.





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



## **HILTON HEAD PLANTATION PROPERTY OWNERS' ASSOCIATION**

### **STRATEGIC PLAN**

**2026 – 2030**

### **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 2026 – 2030**

#### **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 Guidelines.
3. Governing Documents – Provide documentation of building procedures to insure that ARB Guidelines 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 2026-2030**

#### **COMMUNICATIONS COMMITTEE**

##### **GOAL:**

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

##### **OBJECTIVES:**

1. **Digital** – To continue to improve and expand on the digital reach and impact of our various platforms (e-signs, e-blasts, website, digital newsletter, community app.) to our residents, staff and vendors.
2. **Collateral** – To use printed materials to deliver clear, concise communications to our residents, while maintaining the high aesthetic our community has come to expect.
3. **Face-to-Face** – Ensure our residents are well-informed about every opportunity to meet and interact with the management team, Board and committees.



## **STRATEGIC PLAN 2026 – 2030**

### **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 HELP RESOLVE violations of HHPPOA Covenants and Rules and Regulations.
3. Provide 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 2026 – 2030**

### **FINANCE COMMITTEE**

#### **GOAL:**

Provide sound, pro-active and farsighted fiscal stewardship through prudent policy establishment, review, and management to avoid situational borrowing (Debt avoidance).

#### **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 2026 – 2030**

### **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 Plantation House Area Project.
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.
8. Review the long-term (typically 5-year) maintenance related contracts for both general landscape and lagoons.





## **STRATEGIC PLAN 2026 – 2030**

### **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 2026 – 2030**

### **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 2026–2030 Strategic Plan will be made available to Hilton Head Plantation Property Owners and Residents in a number of ways:**

- **Presentation and distribution at the 2025 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 2026-2030**

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](mailto:admin@hhppoa.org)

**Your Comments:**

**The following information is optional:**

**Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Email address:** \_\_\_\_\_



# Hilton Head Plantation Property Owners' Association

## Strategic Plan 2026 – 2030

### 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 22-66.

# Hilton Head Plantation Property Owners' Association

## Consolidated SWOT Analysis

2026 – 2030

### Strengths

#### General:

- Well established and maintained on-island community
- Effective policies and practices in place
- Emphasis on safety and securing of residents
- Effective enforcement procedures consistently applied
- Professional and experienced staff
- Flexibility and adaptability
- National reputation (brand)
- No short-term rental
- Rapid response to emergency situations

#### Communication:

- *Plantation Living*
- Email Blasts
- Website
- Electronic Signs
- Community Forums (i.e., Coffee with Peter, Annual Meeting)

#### Relationships:

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

#### Financial Health:

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

#### Physical Aspects:

- Natural beauty, peaceful environment provides residents a tranquil style of resort living

- North End of the HHI – better elevations; easy access to mainland; buffered from tourist congested areas
- Diverse and high quality physical amenities
- High percentage of full-time resident property owners
- Cadre of experienced and talented volunteers
- Diverse clubs, programs, events
- Proximity to emergency services/hospital
- Outsourced landscaping
- ARB and Covenants ensure property values are maintained
- Community appreciation and commitment of sustaining the natural environment
- On-site Maintenance facility/services

# Hilton Head Plantation Property Owners' Association

## Consolidated SWOT Analysis

2026 – 2030

### Weaknesses

#### Rules and Regulations:

- Governing documents not frequently updated; delay in uploading to website; some posted versions are not latest versions
- Unconcerned residents/tenants; lack of knowledge (un- or mis-informed
- Irresponsible behavior on the part of residents, tenants, contractors, and guests
- Lack of understanding of the level of education, training, experience, expertise, and certification of staff.
- Lack of understanding of the role of our Security officers.
- Part-time resident owners not aware of or responsive when property owner conditions and/or tenant issues arise
- Violations fines are too low

#### Communication:

- *Plantation Living* – designed not compatible with current needs
- Email Blasts – Residents purposefully or accidentally unsubscribe, causing breakdown in communications
- Electronic Sign often difficult to read
- Need live streaming options for meetings and events
- No HHP APP
- Lack of presence on social media
- Lack of e-technology (passes, event registration, bill pay, etc.)
- Style/content/frequency of Member Survey

#### 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
- Staffing challenges

#### Physical Aspects:

- Age of some capital equipment and infrastructure, common facilities



- Condition of leisure paths
- Inadequate audio/visual recording system at gate
- Lagoons continue to collect silt – some have become shallow as they fill up
- Need for improved Wifi and cell phone service
- Lack of trail connection with Main Street
- Delayed upgrades due to competing priorities
- Bike/vehicle/pedestrian traffic issues
- Parking
- Lack of state-of-the-art hardware/software for staff

#### Residents and Programs:

- Apathy of residents
- Aging resident population with the likelihood for increasing demand for services
- Exit of long term staffers resulting in potential loss of corporate knowledge and relationships
- Staff turnover/vacancies extended resulting in increased workload on other staff
- Resistance by residents to use technology

# Hilton Head Plantation Property Owners' Association

## Consolidated SWOT Analysis

2026 – 2030

### **Opportunities**

#### Rules and Regulations:

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

#### Communication:

- Enhance *Plantation Living* – new advertisers, more *Harry Heron*
- Email Blasts – increase subscriptions, texting information system
- Enhance Website – Blogs, photos, online advertising
- Increase visibility of individual officers to residents in public forums
- Increase guest speaker time at Coffee with Peter
- HHP APP
- Expand social media and use of technology
- Enhance Member Survey (style/content/frequency)
- Redesign New Resident Package and general POA communications

#### Relationships:

- Residents take pride in HHP
- Partnership enhancement
- Increased ability to monitor how comparable communities manage and maintain their assets
- Revised staff recruitment/retention processes to reduce turnover

#### Financial Health:

- New/enhanced revenue streams

#### Technology:

- Continue technology advancements (i.e., Security, maintenance scheduling, events registration, bill pay, etc.)
- Consider utilizing alternative energy sources for POA buildings and vehicles
- Explore use of electric vehicles

#### Physical Aspects:

- New/updated amenities
- Evaluate expanded use of ballfields
- Available facilities promoting healthy lifestyle for families
- Encourage residents to renovate/update aging properties

- Continuing effective planned/scheduled maintenance of community property and equipment
- Identification of next Major Capital Project
- Leisure path repair

Residents and Programs:

- New/enhanced programs events and activities
- More frequent “new resident” meetings
- Utilize live streaming
- New/enhanced amenities
- Get “greener”

# Hilton Head Plantation Property Owners' Association

## Consolidated SWOT Analysis

2026 – 2030

### Threats

#### Rules and Regulations:

- Government regulations that significantly increase compliance costs
- Unconcerned/uninformed owners/tenants/guests
- Irresponsible behavior of residents, vendors, and guests
- Delay of 278 Corridor Project
- Energy shortages

#### Crime:

- Cyber security threats
- Vandalism
- Abuse/misuse of Guest Pass System
- Lack of Firearm safety

#### Climate:

- Severe weather threats/natural disasters
- Continued erosion of Pine Island

#### Relationships:

- Competition with other gated communities

#### Financial Health:

- Limited financial resources of owners
- Aging population/changing demographic
- *Plantation Living* – rising production costs of printed version due to digital era
- Economic and political uncertainty
- One or more commercial entities going out of business
- Competition from off-island communities impacting workforce availability
- Rising costs of materials, supplies, insurance, service provider fees, workforce recruitment/retention, etc.
- Recessions
- Lean administration
- Budget constraints
- Changes in real estate market and practices

#### Physical Aspects:

- Aging capital equipment and infrastructure will require additional maintenance

Residents and Programs:

- Loss of corporate knowledge
- Special interest groups
- Leadership turnover
- HHP is behind in incorporating technology advancements in its operations
- Technology resistant residents
- Perceived lack of transparency/openness of Board/Committees/staff

Staffing:

- Lack of workforce housing and qualified personnel
- Economy
- Off-Island competition
- Limited workforce; limited workforce housing; transportation challenges



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**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 – 2026 – 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 move the Bridge and 278 Corridor projects forward in an expeditious manner. 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

**2026 – 2030**

### 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 Plantation House Project for safety when completed.		5. Under review

#### ASSUMPTIONS

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



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**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. 2026 – 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. Explore direct debit for payment of assessments.		5. Evaluate in 2026
6. Conduct the 2027 Survey online only		6. Evaluate for 2027
7. Upgrade printers for billing assessments.		7. 2026

**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

**2026 – 2030**

### 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 hiring an IT specialist to handle the organizations computer, hardware, software and training needs possibly in partnership with another/other local Community Association.	4. Staff is hired	4. 2026
5. Explore installing several cameras at other POA facilities.	5. Install evaluated	5. 2026

### 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**

**2026 – 2030**

**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 2026
2. Evaluate appropriateness of office space.		2. Ongoing – 2026 thru 2028
3. Investigate storing Board packets as PDF files and placing them on the POAs server for easy access.		3. Investigate in 2026
4. When considering the Plantation House Project explore additional office space as well as physical storage.	Project completed	4. 2026-2027

**ASSUMPTIONS**

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



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**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 Guidelines.
2. Vendors will support and comply with the ARB Guidelines.



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**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 Guidelines 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 Guidelines.
2. Vendors will support and comply with the ARB Guidelines.
3. ARB will carefully review all submissions, granting exceptions only when necessary.



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**ARCHITECTURAL REVIEW BOARD (ARB)**

**OBJECTIVE #3**

Governing Documents – Provide documentation of building and landscaping procedures to insure that ARB Guidelines 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 the ARB Guidelines 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 Guidelines.	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 Guidelines, knowing that non-compliance may result in the enforcement of other sanctions.



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**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
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.	1. Fewer recycles of plans for review	1. Ongoing
	2. Fewer rejections of plans	2. Ongoing
	3. Owner, architect, landscaper satisfaction with the process	3. Ongoing
	4. Lower workload for staff in processing repeat submissions	4. Ongoing



## HILTON HEAD PLANTATION STRATEGIC PLANNING

2026 – 2030

### COMMUNICATIONS

#### OBJECTIVE # 1

**Digital** – To continue to improve and expand on the digital reach and impact of our various platforms (e-signs, e-blasts, website, digital newsletter, community app.) to our residents, staff, and vendors.

STRATEGIES	MEASURE	STATUS
1. Continually assess the HHPPOA Website to ensure content, on both mobile and desktop format, is up-to-date, clearly communicated and easily accessible.	1. Communications Coordinator and committee volunteer will regularly review website for updates.	1. Weekly – Ongoing
2. Continually assess resident engagement with the HHPPOA Website (both mobile and desktop format) to ensure it is performing as the vital communication tool it is meant to be.	2. Utilize the metrics offered on website platform.	2. Quarterly – Ongoing
3. Continually assess the effectiveness of the e-blasts being sent out to the residents and make sure access to e-blasts is thoroughly promoted to the community. Transition the e-blast process to <b>Engage</b> and promote sign-up.	3. Utilize the metrics offered on the e-blast and <b>Engage</b> platforms.	3. Quarterly – Ongoing
4. Make sure the e-signs offer pertinent and concise information.	4. Feedback from the community and input from the Communications Committee.	4. Monthly – Ongoing
5. Promote the digital version of <i>Plantation Living</i> . Create a digital advertising strategy and start including our vendors in the online newsletter.	5. Feedback from the community and input from the Communications Committee.	5. Monthly – Ongoing
6. Promote Enumerate and Engage to assist in a seamless and enthusiastic transition to the community app.	6. Utilize the metrics offered on the Enumerate platform.	6. Tri-annually as needed – Ongoing

7. Utilize QR Codes to begin guiding residents to digitalized formats.	7. Utilize the metrics offered on unigode platform.	7. Quarterly – Ongoing
8. Continue to assess the streaming of the bi-monthly “Coffee with Peter” meetings to gauge effectiveness, response to and value of continue and expanding this effort to include Board, committee, annual and other meetings, thereby enhancing understanding and transparency of HHPPOA’s management and governance, activities and initiatives.	8. Feedback from community and monitoring SM platforms.	8. Quarterly – Ongoing
9. Use existing or new part-time staff to consistently listen to/monitor social/digital media so HHPPOA may respectfully and responsibly monitor and inform social/digital media commentary and content, thereby enhancing the best interest of the entire community.	9. Utilize the analytics offered by the various social media platforms, and input from the Communications Committee.	9. Monthly – Ongoing
10. Utilize the 3-Year Survey and other Online Surveys to obtain regular feedback from the community and help troubleshoot potential issues.	10. Utilize the metrics offered on the survey monkey platform and feedback from the community.	10. Tri-annually as needed – Ongoing





## HILTON HEAD PLANTATION STRATEGIC PLANNING

2026 – 2030

### COMMUNICATIONS

#### OBJECTIVE # 2

**Collateral** – To use printed materials to deliver clear, concise communications to our residents, while maintaining the high aesthetic our community has come to expect.

STRATEGIES	MEASURE	STATUS
1. <i>Plantation Living</i> – Continually strive to increase readership by providing pertinent and entertaining content that celebrates the spirit of the community. Evaluate the cost/benefit of expanding the publication to allow for more editorial and display content and additional advertising.	1. Resident feedback and the Communications Committee will review and offer feedback on each issue.	1. Monthly – Ongoing
2. Advertising – Striving to connect our residents with a variety of vendors and offer vendors a high quality venue to promote their services and events.	2. Monthly reports from Communications Coordinator and advertising revenue.	2. Monthly – Ongoing
3. Strive to find the most efficient means to design, generate and distribute printed collateral to minimize waste. Utilize more digital docs with printed QR codes pointing to those downloads.	3. Utilizing Uniqode to track effectiveness of QR codes. Communications Coordinator and Committee will continue to review.	3. Quarterly – Ongoing
4. Update the New Homeowner Packets so the information succinctly yet thoroughly educates new HHP Residents, and utilize tools in the packet to start driving their focus online.	4. Feedback from new residents and input from the Communications Committee.	4. Annually – Ongoing



## HILTON HEAD PLANTATION STRATEGIC PLANNING

**2026 – 2030**

### COMMUNICATIONS

#### OBJECTIVE # 3

**Face-to-Face** – Ensure our residents are well-informed about every opportunity to meet and interact with the management team, board and committees.

STRATEGIES	MEASURE	STATUS
1. Promote Coffee with Peter, bi-monthly meeting with the General Manager, residents and special guest(s).	1. Community attendance, feedback and Communications Committee observations	1. Bi-monthly – Ongoing
2. Promote and Produce the Annual Meeting in March.	2. Community attendance, feedback and Communications Committee observations	2. Annually – Ongoing
3. Promote the New Homeowner Meeting, an annual meeting to introduce residents to the staff and acclimate them to life in our community.	3. Community attendance, feedback and Communications Committee observations	3. Annually – Ongoing
4. Educate residents regarding the intermittent, select access to key meetings as requested.	4. Monitoring social Media, community attendance and feedback.	4. As Required – Ongoing
5. Promote the variety of meetings and activities that are timely and informative and draw the community together.	5. Community attendance, feedback and Communications observations	5. Monthly – Ongoing



## HILTON HEAD PLANTATION STRATEGIC PLANNING

2026 – 2030

### 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**

**2026 – 2030**

**COVENANTS  
OBJECTIVE #2**

**RESOLUTION** – Identify violations and help resolve violations of 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**

**2026 – 2030**

**COVENANTS**

**OBJECTIVE #3**

**CONSISTENCY** – Provide recommendation to the HHPPOA Board of Directors to ensure 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
3. Create consistency in how Rules and Regulations are enforced.	3. Develop a tool that has clear guidelines for inspection and determination of violations that can be used by the committee and the community.	3. 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

2026 – 2030

### 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 zero based annual budget as developed by the staff. Reducing year-end cash to cover a budget shortfall will not be implemented.	1. Review the Budget Guidelines and Budget Calendar 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.	1. Ongoing
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.	2. Ongoing
3. Seek ways to lower operational costs.	3. Review feasibility of concepts as identified and developed. Recommend possible changes to the Board.	3. Ongoing

#### 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

2026 – 2030

### 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 restricted funds, per the then current situation. Review reserve funds status on a quarterly basis. Review invested funds with our advisor annually. Annually review Line of Credit with Bank.	1. Ongoing
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.	2. Ongoing
3. Review approved Repair and Replacement and the Capital expenditures project expenditures.	3. Review expenditures relative to budgeted funds.	3. Ongoing
4. Periodically investigate potential POA revenue generating initiatives.	4. Provide any recommendations to the Board.	4. Ongoing
5. Monitor risk elements	5. Review insurance coverages and any special situations annually and make recommendations to the Board.	5. Ongoing

#### 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 \$500,000 annually through 2030.
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

2026 – 2030

### 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
1. Periodically review current financial policies and current internal financial controls recommend revisions to the Board as appropriate.	1. Schedule review with staff in even numbered years or as required.	1. Next review 2026
2. Annually review Finance Committee Guidelines.	2. Schedule review in Finance Committee Calendar.	2. Last completed in 2024
3. Optimize investment results consistent with the existing Investment Policy. Recommend any changes to the existing Investment Policy as appropriate.	3. Obtain stable returns while meeting risk limitations as stated in the existing Investment Policy. Evaluate and recommend any changes to the Board.	3. Ongoing
4. Per Investment Policy conduct review of Investment Management Service Agreement within five years intervals.	4. Schedule review no later than 2029.	4. Last completed in 2024

#### 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 below historic averages.





**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**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.	1. Ongoing
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.	2. Ongoing

**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**

**2026 – 2030**

**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 each of the geographic areas within the Plantation to make annual property inspections and report findings.	1. Assignments are made in August, with reports 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

**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**

**2026 – 2030**

**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 2027.
5. 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.
6. 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**

**2026 – 2030**

**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 in the third quarter.

**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

**2026 – 2030**

### 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. Frequently interact with golf course superintendents regarding drainage and lagoons leading to the major outfalls, since these are often otherwise neglected.
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**

**2026 – 2030**

**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. Review 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. Review 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**

**2026 – 2030**

**MAINTENANCE**

**OBJECTIVE # 6**

Develop a long-range maintenance plan for the new *Plantation House Area Project*.

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



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**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. Work with the HHP Fishing Club and others to keep the lagoons healthy, esthetically pleasing, and good for recreational fishing.

<b>STRATEGIES</b>	<b>MEASURE</b>	<b>STATUS</b>
1. Proposed a long-term prioritized plan for dredging community lakes and lagoons within HHP.	1. Review one year after agreement with the Town; in subsequent year's 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**

**2026 – 2030**

**MAINTENANCE**

**OBJECTIVE #8**

Review and update as appropriate the long-term (typically 5-year) maintenance related contracts for both general landscape and the HHP lagoons.

STRATEGIES	MEASURE	STATUS
1. Maintain a contract with a local maintenance and landscaping service that is beneficial to HHP both in preserving best-class appearance and financial cost.	1. The appearance and functionality of POA properties are continually assessed by both the HHP staff and the Maintenance Committee and reported at their monthly meetings. Community-wide assessment is provided in the triennial resident survey.	1. Current contract with Palmetto Coastal is for five years and runs through December 1, 2028.
2. Develop an ongoing plan to stock and maintain the HHP lakes and lagoons with plant eating Carp fish.	2. The appearance and general health of lagoons are continually assessed by both HHP staff and the Maintenance Committee reported at the monthly meetings. Community-wide assessment is provided in the triennial resident survey.	2. Current contract with Salt Marsh Aquatics is for one year with an annual renewal option and runs through November 23, 2024.



## HILTON HEAD PLANTATION STRATEGIC PLANNING

**2026 – 2030**

### 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 2027 Survey responses to anticipate changes and needs in recreation.	1. Survey results will serve as the measure	1. Completion - 2025 and 2025 respectively
2. Based on Survey, analyze recreational trends and make recommendations to POA Board.	2. Opinion Survey and resident input.	2. Completion - 2025 and 2028 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**

**2026 – 2030**

**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**

**2026 – 2030**

**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

2026 – 2030

### 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  
STRATEGIC PLANNING**

**2026 – 2030**

**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



# **HILTON HEAD PLANTATION STRATEGIC PLANNING**

**2026 – 2030**

## **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.	



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**SECURITY AND SAFETY**

**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.





**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**SECURITY AND SAFETY**

**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.



**HILTON HEAD PLANTATION  
STRATEGIC PLANNING**

**2026 – 2030**

**SECURITY AND SAFETY**

**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 2026 – 2030

### APPENDIX B

## Operating Budgets

Pro forma operating budgets for the period 2026 – 2030 will be provided by the Assistant General Manager.



# Hilton Head Plantation Property Owners' Association

## Strategic Plan 2026 – 2030

### APPENDIX C

## Capital Requirements

Pro forma capital requirements for the period 2026 – 2030 will be provided by the Assistant General Manager.