Herons Glen Recreation District Strategic Plan

Based on 2026 Survey and Recommendations

Adopted June 26, 2026

Implementation begun calendar year 2026.

Table of Contents

District Core Values 3
District Mission Statement 3
District Vision Statement 3
District Key Roles and Responsibilities 4
The Roles and Responsibilities of Board Members 4
The Roles and Responsibilities of Management 4
The Roles and Responsibilities of Committees 4
The Process 5
Development of the District Strategic Plan 5
The Planning Tools 6
Achievements against the 2024 Strategic Plan Deliverables 7
Strengths, Weaknesses, Opportunities, Threats (SWOT) 8
Top Strengths 8
Top Weaknesses 8
Top Opportunities 8
Top Threats 8
Key Strategic Issues to be addressed in the next 1-3 years 9
Proposed 2026 Action Initiatives 10
Facilities and Amenities 10
Governance 10
Services 10
Operations 10

District Core Values

District strives to provide the following for the residents of Herons Glen:

- Honesty, integrity, and transparency of Board and management actions
- Professional, competent management and staff
- Financial responsibility over operational costs and capital investments which serve to provide high quality services, well maintained facilities, and enhanced property values
- Prudent long-range planning which serves residents' evolving tastes and demographic evolution

District Mission Statement

Herons Glen Recreation District is a Florida Special District, a community that provides quality recreation, activities, and programs for all residents. We strive to provide excellent financial value and well-maintained facilities to satisfy varied interest groups and promote healthy lifestyles.

District Vision Statement

Continue to be one of the premier active adult communities in Southwest Florida that provides an excellent value for our current and future residents.

District Key Roles and Responsibilities

The Roles and Responsibilities of Board Members

- Comply with government mandates; from those required by Lee County to those required by Florida State Statutes for FL Special Districts.
- Approve the annual budget for the district to establish assessments, fees, and control expenditures.
- Hire the General Manager, provide guidance and direction to the General Manager, assess the ongoing performance of the General Manager, dismiss the General Manager if/when necessary.
- Develop long term goals and a strategic plan for the facilities, amenities, and services provided by the Herons Glen Recreation District; making certain that decisions are made in the greater interest of the residents.
- Review financial status of District and review, approve, deny, or defer committee requests.
- Establish and review District policies and objectives and ensure compliance.
- Communicate and coordinate community requirements with the Herons Glen HOA.
- Demonstrate expected resident participation in District amenities through active engagement in District activities when possible.
- Influence positively other residents and set an example by adhering to all club rules and policies.

The Roles and Responsibilities of Management

- Support the District Board through facility oversight, due diligence, and subject matter expertise in specific functional areas.
- The GM hires Department Managers, provides guidance and direction to Department Managers, assesses the ongoing performance of Department Managers, dismisses Department Managers if/when necessary.
- Oversee the general operation of the District.
- Maintain regular, clear, and complete communications to the Board on all aspects of District operation.
- Maintain regular, clear, and complete communications to the community on significant aspects of District operation.
- Ensure District expenditures are within the approved budget.

The Roles and Responsibilities of Committees

- Support the District Board through subject matter expertise in specific functional areas defined in their charter.
- Committees are ADVISORY and cannot set policy, make operating decisions, or commit District funds, but rather make RECOMMENDATIONS to the Board for action.
- Maintain regular, clear, and complete communications to the Board on all activities, discussions, and progress on responsibilities defined in their charter.

The Process

Development of the District Strategic Plan

The Herons Glen Recreation District Strategic Plan is meant to provide strategic direction along with specific goals and objectives to be accomplished during the calendar year of its issuance. It is expected to be revisited, refreshed, and revised on an annual basis to address the following:

- Determine progress made regarding specific actions called out in the plan
- Adjust the plan as necessary to maintain a plan that reflects the needs and desires of the Herons Glen residents and remains aligned to the District Values, Vision, and Mission

These reviews and potential revisions should be performed on an annual basis by the District Long Range Planning Committee and suggested changes should be subsequently forwarded to the District Board of Supervisors for the Board's review, possible amendment and adoption.

The Strategic Plan is developed by annually surveying all residents to identify their satisfaction levels and suggestions for improvements, alongside incorporating committee, management, and Board recommendations.

The Planning Tools

Herons Glen Recreation District utilizes a complementary set of planning tools in addition to recommendations from committees, management and the Board to effectively identify and manage the near-term and long-term needs of the residents and community. These include:

Annual Resident Survey: *Listening to Residents*

The annual Resident Survey is used to gather direct input from homeowners regarding their needs, priorities, and satisfaction. This is focused on ensuring that plans reflect the preferences of the community.

- Purpose: To provide demographic trends, collect homeowner feedback, assess resident satisfaction with District facilities and amenities, guide planning priorities, and provide measurement of objectives achievement to meet Florida state requirements.
- How it Coordinates: Informs the strategic and master plans with real resident data and insights.

Annual Strategic Plan: *Setting Priorities and Direction*

The annual strategic plan is a 1 to 3-year roadmap that outlines goals, initiatives, and action steps to improve the community.

- Purpose: To define actionable short- and mid-term goals.
- How it Coordinates: Translates survey input into specific initiatives and informs timing and scope of master plan items.

Long-Term Master Plan: *The Long-Term Vision*

The master plan examines Mid-Term (3-10 years) and Long-Term (10–20+ years) opportunities using a framework that attempts to identify significant trends in resident demographics and wants, likely amenity and facility needs, anticipated major capital improvements, and infrastructure planning.

- Purpose: To ensure mid and long-term sustainability and modernization of the community.
- How it Coordinates: Builds on strategic plan and aligns with financial and physical planning needs over decades.

Capital Plan: *Financial Plans*

District utilizes a software tool and had initial consulting services from Club Benchmarking to identify District assets, estimate useful life, forecast maintenance requirements, estimate replacement lifecycles and costs, and enable a 20-year estimation of probable capital needs to maintain District amenities and facilities. This asset database is refreshed each year and is used by management to develop the annual District capital budgets and resident assessments.

- Purpose: To provide long-term capital planning to ensure asset maintenance, replacement, and new capital needs.
- How it Coordinates: Builds on strategic plan and Master Plan to identify long term capital needs and aligns financial planning with physical planning needs over decades.

Achievements against the 2024 Strategic Plan Deliverables

Since its last adoption, progress has been most evident in the Facilities & Amenities category, led by the progress on the bond projects. Several operational initiatives remain in early stages or have not yet begun.

Strategic Issue	Placed on 2024 KPI	Status
Facilities & Amenities	Finalize plans for remaining bond projects.	Nearing Completion
	Develop a sustainability plan Develop a plan for Community Irrigation System	Not started Nearing Completion
	Refresh of the Asset management and tracking databases (Club Benchmarking)	Regular updates to the Club Benchmarking tool have been incorporated into the annual budgeting process.
Governance	None Listed	
Services	None Listed	
Operations	Develop a written Technology Plan	Committee created
	Complete implementation of the online event booking for residents to sign up for events on electronic devices.	Partially Completed
	Complete migration of journal entries with backup to electronic records with the capability to attach audit trail directly corresponding journal entry in software system	?????

Strengths, Weaknesses, Opportunities, Threats (SWOT)

Top Strengths

- Recreation District status – ability to issue tax-free bonds to finance facilities development; tax-free status
- Fiscal soundness and responsibility
- District owned common facilities
- Active lifestyle with an abundance and variety of amenities
- Strong management team
- Longevity (sustainability) as a fully developed, well managed community
- Security and safety
- Recently refreshed amenities and facilities based on 2020 Bond Capital Projects

Top Weaknesses

- Aging Infrastructure – primarily focused on the Common Lot Irrigation System (CLIS)
- Lack of land for expansion of District facilities and amenities
- Split management of community
- Lack of public transportation for potential District employees. However, this has not hampered the hiring of local employees so far.

Top Opportunities

- Marketing of the Herons Glen golf course to the public as required to meet budget.
- Marketing of Ballroom and Meeting Rooms to the public as required to meet budget.
- Improving technology utilization to assist with resident satisfaction and operational efficiency.
- Water sustainability, such as additional water storage capacity.
- Energy sustainability, such as exploring the use of solar.

Top Threats

- Inability to grow – lack of land for future expansion will limit District financial growth and ability to develop new amenities to meet residents growing desires
- Capital Reserves are limited to turnover of existing home sales, increasing assessments, and interest earned on existing reserves.
- Growth Capital is limited to bond issuance
- Expansion of services is limited to ability and willingness of existing homeowners to absorb increases in assessments for growing operational costs
- Increase in costs not within the District control, such as insurance, etc.
- Potential changes to the Zemel Landfill
- Potential for State elimination of the “Special District”/ “Recreation District” status

Key Strategic Issues to be addressed in the next 1-3 years

The following strategic issues have been identified from the Annual Resident Survey, as well as committee, management and Board recommendations as issues facing Herons Glen Recreation District which may need to be addressed:

1. Facilities and Amenities The focus of Facilities and Amenities development should emphasize optimizing and enhancing existing facilities rather than adding new ones. This includes:
    - Complete CLIS irrigation system upgrade.
    - Complete restrooms at the practice area
    - Resolve drainage & shade structures on Bocce courts
    - Maintain and regularly update the Club Benchmarking tool, as the source of record, to be used for budget planning and modeling.
2. Governance
    - Provide Clear communication and easy access to information in order to help residents better understand priorities and progress on activities and initiatives.
    - Continue Rules and Policies review
    - Develop and publish Annual Goals and Objectives as required by Florida Statute
    - Evaluate whether Goals and Objectives were met
3. Operations
    - Develop a definitive plan to utilize modern technologies to improve operational efficiency and resident services.
4. Services
    - Improve the Pool Deck Services, including increased staffing presence, reservations, use of technology for ordering, and/or integration of an ordering/pickup window or Tiki Hut.
    - Consider expanding events throughout the entire year, not just during peak season.

Proposed 2026 Action Initiatives

Facilities and Amenities

Long Range Planning

- **Long Range Planning Committee** to review the Community Master Plan and make recommendations to the Board.

Facilities, Property, and Asset Maintenance

- **District Management** to complete the construction of new maintenance buildings.
- **District Management** to complete the construction of new restrooms at the Golf Practice Area.
- **District Management** to complete the implementation of the Common Lot Irrigation System (CLIS) upgrade.
- **District Management** to resolve canopy and other problems at bocce courts.
- Develop a Sustainability Plan including water and power.

Long Term Capital Plan

- **District management** to maintain and regularly update the Club Benchmarking tool, as the source of record, to be used for budget planning and modeling.
- **The Board with the assistance of the District Finance Committee and District Management** to review and refresh the Long-Term Capital Plan using the Club Benchmarking report, to develop an estimate of capital needs and capital sources, and to identify near-term and long-term capital funding gaps and opportunities.
- **The Long-Range Planning Committee** should identify survey suggestions which are worthy of consideration for inclusion for capital funding or future bond funding.

Governance

Rules and Policies Review

- **District Board** to continue updating Policies and Rules as needed.
- **District Board** to Develop and publish Annual Goals and Achievements as required by Florida Statute

Services

- **District Management** should develop a plan to address suggestions regarding Pool Deck dining services.
- Consider opportunities to expand events throughout the entire year, not just during peak season

Operations

Technology Plan

- Develop a Technology Plan to leverage newer technologies more fully for improved customer service and operational efficiency. This plan should focus on technologies that can be easily leveraged, using existing systems or low-cost new systems, to improve resident experiences, convenience, and operational efficiency.

Metrics and KPI's

Strategic Issue	Performance Metric/Deliverable	Responsible Party	Target Completion Date
Facilities & Amenities	Complete CLIS upgrade	District Management	June 2026
	Complete Restroom at Practice Area	District Management	October 2026
	Develop Sustainability Plan	District Management	December 2027
	Complete storage facilities	District Management	August 2026
	Resolve drainage & shade at Bocce	District Management	June 2026
	Maintain and update the Club Benchmarking tool	Finance Committee and Management	Ongoing
	Review the Master Plan	LRP and Board	December 2026
	Review the Capital Plan	Finance Committee and Management	
	Identify survey suggestions that are worthy of consideration for capital funding	LRP	May 2026
Governance	Strengthen communication and access to information		Ongoing
	Continue Review of Rules and Policies	District Board	Ongoing

	Develop & Publish Annual Goals & Objectives as required by Statute	District Board	September 2026
	Evaluate if previous year's Goals & Objectives were met	District Board	December 2026
Operations	Create a Technology Plan	LRP and management	December 2026
Services	Address suggestions regarding Pool Deck dining services	District Management	October 2026
	Evaluate expansion of events throughout the year not just in season.	District Management	October 2026