



## Welcome to Herons Glen Golf & Country Club RECREATION DISTRICT



The community known as Herons Glen Golf & Country Club consists of two separate and distinct organizations: the Herons Glen Recreation District (HGRD) & the Herons Glen Homeowners' Association (HOA).

This pamphlet is designed to acquaint you with the Herons Glen Recreation District, its history, purpose, and function.

The HGRD is a governmental entity. Florida law refers to it as a Special District. Special Districts serve a specific geographical area and are governed by an elected Board of Supervisors or Commissioners. Special Districts are very similar to municipalities. They are set up to perform more specific, limited functions. Examples of other Special Districts in our area are the North Fort Myers Fire District and the Lee County Mosquito Control.

## Recreational Facilities

The Recreation District is responsible for the recreational facilities within the Herons Glen Golf & Country Club:

- Golf Course
- Clubhouse
- Dining Rooms & Lounge
- Fitness Center
- Swimming Pool & Spa
- Tennis Courts
- Pickleball Courts
- Bocce Courts
- Shuffleboard Courts
- Associated Buildings & Structures
- Common Lot Irrigation System (CLIS)
- Any Future Recreational Amenities

NOTE: The Herons Glen Homeowner's Association has different responsibilities. You may contact the HOA office for further information concerning its areas of responsibility.

## How the District Was Formed

The HGRD was started by a group of concerned residents who wanted a way to purchase the existing Herons Glen recreational facilities from the developer.

In 1999, the developer agreed to sell the recreational facilities, including the golf course, to the residents for \$15 million. After a vote of the community, the Recreation District was formed to create a governmental entity capable of issuing tax-free bonds in order to raise the needed \$15 million to complete the purchase from the developer.

## Use of the HGRD Facilities

*As a matter of law*, all of the facilities owned by the District, a governmental entity, are public property and as such must be made available to the general public. HGRD, as owner, establishes a fee structure for the public to use those facilities.

*As a matter of policy*, however, the HGRD Board of Supervisors has traditionally permitted Herons Glen property owners certain privileges not available to the general public. For example, owners and their guests are permitted to use all recreational facilities other than the golf facilities free of charge.

The rationale for giving Herons Glen owners special privileges not available to the general public is that they are already paying most of the operation and maintenance expenses of those facilities through their quarterly operations assessments.



## Rules of the District

All recreation facilities are owned by the District. As the owner of these properties, the HGRD has the right to set rules on their use. As the sole governing authority, the Board of Supervisors determines from time to time all rights and privileges to be made available to the owners, residents, and the general public.

## How the District Is Funded

Rather than using ad valorem, i.e. property taxes, HGRD utilizes assessments, also called "Special Assessments", to raise the funds to purchase, operate, and maintain the recreational facilities. Special Assessments have the same legal status as taxes but are set on the basis of the benefit provided to the property assessed, rather than on the value of each parcel assessed.

Beginning in 1999, HGRD assessed each of the 1,300 existing or proposed lots an annual amount for the sole purpose of raising funds to repay the bond money that the District borrowed to purchase the recreational facilities.

Most recently in 2020, the residents voted again to take advantage of favorable interest rates and reissue the bond. This reissuance raised \$12.9 million for future capital projects, including a \$6 million golf course renovation completed in December 2021. The current annual bond assessment of \$1,425 appears annually on each property owner's tax bill.

The HGRD imposes a second annual assessment upon each lot for the purpose of operating and maintaining the recreational facilities. Those annual "O&M Assessments" are used to fund all expenses of the District, except those of maintaining the playability of the golf course, which has traditionally been paid for through golf revenues. However, the District is permitted by law to budget a portion of its general fund revenues for golf course expenses.

No specific legal rights are created for a resident or homeowner as a result of their payment of the annual assessment. The justification is that the recreational facilities, having been purchased for a good reason, must be operated and maintained in a proper manner. Otherwise, the benefits of having those facilities in the community would be lost.

## Why the District May Assess

The purchase of the recreational facilities from the developer had a financial benefit to the resident owners of properties in Herons Glen. It improved the value of each parcel within Herons Glen sufficiently to warrant an annual assessment on each parcel. The assessment was justified by the enhancement in the value of each resident's home arising from its location in a community in which all of the recreational facilities were available. In addition, it was concluded that a home with a golf course, near it or around the corner from it, is much more valuable to a prospective purchaser than the identical home in an otherwise identical community without such facilities.

In other words, every lot or homeowner in Herons Glen has already received something of value in exchange for his or her payment of the annual bond assessment, i.e., an increase in the value of their property. No other entitlement, such as any right to use the golf course without paying a fee, arises out of that annual payment.

## How the District Is Managed

The District is supervised by five (5) Supervisors elected by the homeowners for terms of three (3) years each. The Board of Supervisors provides oversight and employs a General Manager to direct the day-to-day operation of the District, including the selection of Department Managers.

## Golf Memberships

The Golf Course is an important part of the District's assets. Its playability and aesthetic beauty clearly add value to each home in the community. As one of the funding mechanisms for maintaining the playability of the golf course, and in recognition of the golf course's importance to the community, the Board of Supervisors established a golf membership program. Golf members pay annual prepaid greens fees for golf course play as well as other benefits. These membership payments are used to maintain the playability of the golf course. Besides golf memberships, no other "members" of the District exist.



## Ways to Stay Informed

- Attend monthly HGRD Board Meetings
- Attend Committee Meetings
- Visit the website at [heronsglenc.com](http://heronsglenc.com)
- Watch the Herons Glen Community TV Channel
- Read various email communications from the HGRD Board of Supervisors, General Manager, and/or Management Team.

**Herons Glen Recreation District**  
2250 Herons Glen Blvd., N. Fort Myers, FL 33917  
Administration: 239-731-4501

**[heronsglenc.com](http://heronsglenc.com)**