

Strategic Plan 2022 – 2026

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.

Key Themes for the 2022-2026 Strategic Plan: 1. We should take care of what we have above and below the ground. 2. We should continue to improve communications between HHP Board/staff and HHP property owners/residents. 3. We should continue to improve the utility of existing recreation and POA facilities. 4. We should sponsor an appropriate level of recreation and education programs to appeal to our diverse population. 5. We should provide a safe and secure environment for all residents, staff and guests. 6. We should maintain vigilance of our expenditures in light of economic conditions. 7. We should create more awareness of the benefits of HHP living in light of both on-Island and off-Island competitive developments. 8. We should enhance the competitive advantage for marketing residential properties within HHP by such actions as: a. Producing a HHP marketing DVD for distribution to realtors, potential purchasers and other interested parties b. Promoting the Realtor Decal Program c. Making the Realtor Open House Procedures more user-friendly. 9. We should continue to find ways to implement green technologies and improve recycling to protect our environment. 10. We should emphasize the electronic voting option for POA elections. 11. We should continue to improve telecommunications capacity within HHP, while adapting to changing technologies.

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DEMONSTRATION ONLY



Hilton Head Plantation Property Owners' Association (HHPPOA)

Stakeholder(s):

Lois Wilkinson

Role: HHPPOA President

Vision

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.

Mission

To provide directions and priorities for management and budgeting

A. Administration

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.

Stakeholder(s)

HHPPOA Administration Committee

A.1. Staffing

Provide a stable competent staff in a changing labor force to satisfy the needs of HHP's property owners and residents.

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.

Performance Indicators

Strategy A.1.1 Staff Turnover

Description	Type	Start Date	End Date	Percent
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.	Target			5
Ongoing – 2022 – Reviewed biannually	Actual			

Strategy A.1.2 Employee Incentives

Description	Type	Research	Start Date	End Date
Continue to offer and research employee incentives.	Target			
Ongoing – Obtain input from staff and other like organizations annually.	Actual	Ongoing		

Strategy A.1.3 Work Hours

Description	Type	Review	Start Date	End Date
Periodically review employee work hours to minimize impact on peak travel periods.	Target			
	Actual	Ongoing		

Strategy A.1.4 Traffic Conditions

Description	Type	Improvement	Start Date	End Date
Work with Town, County, and State Representatives to improve traffic conditions on Route 278, to include the widening of the bridge to three lanes.	Target			
Work with appropriate community groups to influence County and State Governments to improve traffic conditions on Route 278, the Bluffton Parkway, and advocate appropriate land uses to minimize future traffic.	Actual			

A.2. Safety

Provide a safe work environment for all employees and safe facilities for all Plantation residents and visitors.

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

Performance Indicators

Strategy A.2.1 OSHA Requirements

Description	Type	Compliance	Start Date	End Date
Continue to meet OSHA requirement and provide a safe environment for employees. ~ Worker compensation experience rating remains stable	Target			
Review annually	Actual			

Strategy A.2.2 Absenteeism

Description	Type	Start Date	End Date	Percentage
Provide appropriate safety training for key employees. ~ Absenteeism due to illness or work-related injury will be less than 2.5% annually.	Target			2.5
Incorporated into orientation training of every employee.	Actual			

Strategy A.2.3 Accidents

Description	Type	Reduction	Start Date	End Date
Incorporate safety orientated goals into the annual employee evaluation process. ~ Accidents at POA facilities will be reduced.	Target			
Set goals in each annual review	Actual			

Strategy A.2.4 Flu Shots

Description	Type	Continuation	Start Date	End Date
Continue Flu Shot Program for employees. Add our experience with COVID-19 to our Disaster Management Plan.	Target			
	Actual	Ongoing		

A.3. Efficiency

Use current and future technology to automate POA services and increase efficiency while reducing costs.

ASSUMPTIONS: The Plantation has achieved defacto build out. This has stabilized assessments, which means there will be an increased need to emphasize efficiency, effectiveness and to reduce costs. | As the population of the Plantation grows the need for additional administrative support will be absorbed through the use of technology.

Performance Indicators

Strategy A.3.1 E-mail

Description	Type	Usage	Start Date	End Date
Explore using e-mail addresses for direct billing and other services.	Target			
Ongoing	Actual			

Strategy A.3.2 Contact Addresses

Description	Type	Collection	Start Date	End Date
Collect a single email address contact for each property on HHP. ~ 2022	Target		2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

Strategy A.3.3 Software & Hardware

Description	Type	Upgrading	Start Date	End Date
Continue to upgrade software and hardware to keep pace with improvements in technology. ~ Evaluate new software annually	Target			
	Actual			

Strategy A.3.4 E-Forms

Description	Type	Usage	Start Date	End Date
Use Website E-forms to increase Administrative efficiency.	Target			
	Actual	Ongoing		

Strategy A.3.5 Credit Cards

Description	Type	Usage	Start Date	End Date
Consider expanding credit cards for online class registration and other purchases. ~ Evaluate in 2022	Target		2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

Strategy A.3.6 Assessments

Description	Type	Debiting	Start Date	End Date
Explore direct debit for payment of assessments. ~ Evaluate for 2022	Target		2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

Strategy A.3.7 Wi-Fi

Description	Type	Availability	Start Date	End Date
Explore Wi-Fi at Dolphin Head Recreation. ~ Phase in as resources permit.	Target			
	Actual			

Strategy A.3.8 Survey

Description	Type	Online Completion	Start Date	End Date
	Actual			
Conduct 2021 Survey online only. ~ 2023	Target		2023-01-01	2023-12-31

Strategy A.3.9 Printer

Description	Type	Upgrade	Start Date	End Date
Upgrade printer for billing assessments. ~ 2022	Target		2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

A.4. Training

Provide training to maximize staff efficiency and reduce outside consulting costs.

ASSUMPTIONS: 1. Staff training improves morale, builds a team relationship, and improves quality service. 2. The need for consulting services will increase.

Performance Indicators**Strategy A.4.1 Consultant Cost Reduction**

Description	Type	Status	Start Date	End Date	Percentage
Provide all personnel computer training as needed. ~ Outside consulting costs are reduced by 10%	Target	Ongoing			10
	Actual				

Strategy A.4.2 Professional Development Funding

Description	Type	Status	Start Date	End Date
Continue to provide professional development funds in operating budget for staff participation in applicable workshops, seminars, and conferences. ~ Minimize the need for additional support staff.	Target			
	Actual	Ongoing		

Strategy A.4.3 Professional Development

Description	Type	Status	Start Date	End Date
Make professional development an objective in employees' performance goals.	Target			
	Actual	Ongoing		

Strategy A.4.4 Scheduling Software

Description	Type	Efficiency	Start Date	End Date
	Actual		2020-01-01	2024-12-31
Explore scheduling software. ~ Make staff more efficient. ~ 2024	Target		2024-01-01	2024-12-31
	Actual			

Strategy A.4.5 IT Specialist

Description	Type	Hiring	Start Date	End Date
Explore hiring an IT specialist to handle the organizations computer, hardware, software and training needs possibly in partnership with another/other local Community Association. ~ Staff is hired ~ 2022	Target	Hired	2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

A.5. Space

Provide adequate storage for POA data equipment and provide a comfort work environment for employees.

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

Performance Indicators

Strategy A.5.1 Records Storage

Description	Type	Investigation	Start Date	End Date
Investigate latest technology for storing required paper records. ~ Reduce the need for paper storage. ~ Investigate in 2022	Target		2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

Strategy A.5.2 Office Space

Description	Type	Evaluation	Start Date	End Date
Evaluate appropriateness of office space.	Target		2022-01-01	2026-12-31
Ongoing – 2022 thru 2026	Actual		2022-01-01	2026-12-31

Strategy A.5.3 Board Packets

Description	Type	Electronic Access	Start Date	End Date
Investigate storing Board packets as PDF files and placing them on the POAs server for easy access. ~ Investigate in 2022	Target		2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

Strategy A.5.4 Kitchen

Description	Type	Upgrading	Start Date	End Date
Upgrade kitchen for storage and space ~ Schedule for 2022	Target		2022-01-01	2022-12-31
	Actual		2022-01-01	2022-12-31

B. Covenants & ARB Guidelines

Provide consistent and effective review of all design submittals ensuring conformity with the Plantation's Covenants and ARB Guidelines.

Stakeholder(s)

Architectural Review Board

B.1. Communications

Develop understanding by homeowners and commercial vendors the importance of following our building procedures.

ASSUMPTIONS: 1. Residents will understand and follow the building procedures as stated in the ARB Rules and Regulations. 2. Vendors will support and comply with the ARB Rules and Regulations.

Stakeholder(s):

Homeowners

Commercial Vendors

Performance Indicators

Strategy B.1.1 Website Usage

Description	Type	Checklists & Applications	Start Date	End Date
Encourage residents and vendors to access the HHPPOA web for information regarding the building review, and approval process. ~ Staff liaison will provide checklists and applications for design concept , preliminary, and final review.	Target			
	Actual	Ongoing		

Strategy B.1.2 Communication

Description	Type	Timeliness	Start Date	End Date
Communicate to property owners on timely topics via Plantation Living and through the General Manager.	Target			
Staff liaison provides topical write-ups to Plantation Living and General Manager	Actual	Ongoing		

Strategy B.1.3 Monthly Meetings

Description	Type	Information	Start Date	End Date
Inform residents and vendors of scheduled ARB monthly meetings.	Target			
Staff liaison encourages complete submissions of required plans and documents.	Actual	Ongoing		

Strategy B.1.4 Meeting Results

Description	Type	Communication	Start Date	End Date
Communicate results of ARB meetings to those residents who submitted plans.	Target			
Staff liaison communicates results to vendors ; encourages and offers advice for re-submittals.	Actual	Ongoing		

B.2. Enforcement

Assure compliance with the Covenants and/or ARB Rules and Regulations.

ASSUMPTIONS: 1. Residents will understand and follow the building procedures as stated in the ARB Rules and Regulations. 2. Vendors will support and comply with the ARB Rules and Regulations. 3. ARB will carefully review all submissions, granting exceptions only when necessary.

Performance Indicators

Strategy B.2.1 Rules & Regulations

Description	Type	Understanding	Start Date	End Date
Encourage residents and vendors to read the ARB Rules and Regulations for information regarding building and the review process. ~ Compliance will expedite the building process.	Target			
Staff liaison explains procedures to avoid delay in building procedure.	Actual	Ongoing		

Strategy B.2.2 Plans

Description	Type	Status	Start Date	End Date	Percentage
Reinforce the use of architects or professional designers for plan preparation. ~ Percentage of plans prepared by professionals.	Target				
	Actual	Ongoing			

B.3. Governing Documents

Provide documentation of building procedures to insure that ARB Rules and Regulations are supporting of and consistent with the Amended Protective Covenants.

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 Rules and Regulations, knowing that noncompliance may result in the enforcement of other sanctions.

Performance Indicators

Strategy B.3.1 Applications

Description	Type	Review & Advice	Start Date	End Date
Review residents' applications to ensure concise information concerning material required for review prior to ARB submission. ~ ARB will review submitted material and advise on how to proceed to next phase of the review. Complete submissions will facilitate a final approval.	Target			
	Actual			

Strategy B.3.2 Checklists & Schedules

Description	Type	Information	Start Date	End Date
Inform residents and vendors of building checklists and inspection schedules required by the ARB to inspect on-site building activity. ~ Staff liaison will visit and document ongoing building progress.	Target			
	Actual	Ongoing		

Strategy B.3.3 Rules & Regulations

Description	Type	Recommendations	Start Date	End Date
A biennial review of Rules and Regulations recommend changes to the POA Board to be considered and adopted. ~ ARB develops recommendations to the POA Board of Directors to modify the ARB Rules and Regulations. Regular review	Target			
	Actual			

B.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.

Stakeholder(s):

Owners

Landscapers

Architects

Performance Indicators

Strategy B.4.1 Compliance

Description	Type	Status	Start Date	End Date
Review plan submissions for consistency, fit in the neighborhood and the Plantation, esthetics, and compliance with POA Rules and Regulations. ~ Fewer recycles of plans for review Fewer rejections of plans	Target			
	Actual	Ongoing		

Strategy B.4.2 Feedback

Description	Type	Satisfaction	Start Date	End Date
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. ~ Owner, architect, landscaper satisfaction with the process Lower workload for staff in processing repeat submissions	Target			
	Actual			

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C. Communication

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

Stakeholder(s)

Residents

Board of Directors

Staff

Potential Property Owners

C.1. Plantation Living

Continue to improve the value and readership of Plantation Living monthly newsletter.

ASSUMPTIONS: 1. Plantation Living will continue as a leading communication vehicle of the HHPPOA, communicating important information, Board deliberations, and Board issues that impact/affect property owners. 2. Plantation Living should fully serve the best interests of HHPPOA property owners. 3. The publishing and distribution of Plantation Living, to the extent possible, should be self-supporting.

Performance Indicators

Strategy C.1.1 Input & Recommendations

Description	Type	Submission	Start Date	End Date
The Communications Committee will provide input to and offer recommendations for the content of Plantation Living and report its recommendations for any major changes.	Target	Quarterly		
	Actual	Ongoing		

Strategy C.1.2 Financials

Description	Type	Reports & Recommendations	Start Date	End Date
The Communications Committee will review Plantation Living Advertising Guidelines and financials and report its findings and recommendations.	Target			
Monthly reports from Communications Coordinator	Actual	Ongoing		

C.2. F2F Communication

Continue to optimize face-to-face communication between residents, Staff and Board of Directors as relevant and appropriate.

ASSUMPTIONS: 1. Although we must keep up with the latest communications technology (Internet, Email blasts, etc.), it is very important to maintain “human contact” with our residents, Staff, and Board of Directors.

Stakeholder(s):

Residents

Board of Directors

Staff

Performance Indicators

Strategy C.2.1 Meetings

Description	Type	Participation & Feedback	Start Date	End Date
Coffees with Peter, bi-monthly meetings with residents. Topics/speakers to be informative and timely. Key staff members and Board members should attend. ~ Evaluate resident attendance at such meetings, participation and feedback.	Target			
	Actual	Bi-monthly		

Strategy C.2.2 Annual Meetings

Description	Type	Feedback	Start Date	End Date
POA Staff will hold annual meetings with property owners and residents. ~ Feedback from residents in attendance.	Target			
	Actual	Annual		

Strategy C.2.3 March Meeting

Description	Type	Success	Start Date	End Date
Annual Meeting in March ~ Successful completion of meeting (required by ByLaws).	Target			
	Actual	Annual		

C.3. HHPPOA Website

Increase the number of HHPPOA property owners using the Website as an important part of their communications process with the HHPPOA Board, its Standing Committees and the professional Staff.

Consider enhanced utilization of the Website and Internet as supplemental mechanisms for communication between residents, the Board of Directors, and Staff. | ASSUMPTIONS 1. Utilization of the HHPPOA Website continues to be a productive and useful tool in the process of communication between residents, Board of Directors, and Staff. 2. The HHPPOA Website should fully serve the best interests of HHPPOA property owners. 3. The value/use of the HHPPOA Website by property owners will increase when the content becomes valuable to them.

Stakeholder(s):

HHPPOA Property Owners

HHPPOA Board

HHPPOA Standing Committees

HHPPOA Professional Staff

HHP Residents :

Strive to make the Website a vital source of information for residents.

Performance Indicators

Strategy C.3.1 Improvements

Description	Type	Evaluation	Start Date	End Date
The Communications Committee will continue to identify/evaluate improvements to the Website that will make it more attractive and user-friendly by providing data/functionality that will cause the Website to become the first source of information for residents/staff. ~ Discuss in Communications Committee meetings; gather resident feedback.	Target	Quarterly or as defined		
	Actual			

C.4. Multimedia

Continue to explore the use of multimedia to improve and/or expand communications between residents, Staff and the Board of Directors where appropriate.

Consider the use of “alternate” electronic technologies (especially in future years with rapidly changing technologies). | ASSUMPTIONS: 1. To maintain our standing as the premier community on the Island, it is in our best interest to continue to monitor the use of the latest technology by the population in order to reach residents and others by utilizing the easiest and most widely accepted methods of communication. 2. Continue to update our current technology or replace it with newer technology that is cost-effective and suited to our needs.

Stakeholder(s):

HHP Residents

HHPPOA Staff

HHPPOA Board of Directors

HHPPOA Communications Committee

Performance Indicators

Strategy C.4.1 Technologies

Description	Type	Evaluation	Start Date	End Date
Evaluate technologies as a means of communicating to residents. ~ Research feasibility and cost.	Target			
	Actual			

Strategy C.4.2 Instagram

Description	Type	Usage	Start Date	End Date
Encourage the use of Instagram for sharing photos, news, advertising, events, etc. ~ Feedback from residents and advertisers.	Target			
	Actual			

C.5. Survey

Produce the 2024 Resident and Opinion/Demographic Survey.

Produce the 2027 Resident and Opinion/Demographic Survey. | ASSUMPTIONS: The purpose of HHPPOA's triennial Resident Demographic/Opinion Survey is to obtain demographic information from residents, as well as to ask their opinion on various topics and issues. Not only does this information aid the POA in many of their decisions, but it also serves to convey to residents that their feedback and participation is important to and welcomed by the POA. The Survey helps to foster community spirit and belonging.

Performance Indicators

Strategy C.5.1 Survey

Description	Type	Publication	Start Date	End Date
The Communications Committee – with input from all POA Committees – will provide content for and review of the triennial Communications Survey (summarized in Plantation Living with the full details available on the HHP Website or in hardcopy at the POA Service Center) for collecting resident's demographic and interest data, review the tabulated data, and report its findings and recommendations. ~ Produce the 2021 Resident Survey.	Target			
	Actual			
Begin in September/October 2023 to collect questions from Committees and formulate	Target		2023-09-01	2023-10-31
2024 Draft to present to the POA Board.	Target		2023-11-01	2024-05-31

Description	Type	Publication	Start Date	End Date
Survey to be published in Plantation Living in the April 2024 edition.	Target		2024-04-01	2024-04-30

C.6. E-mail

Continue to optimize email blast notifications as a main source of communication between HHP POA Staff and residents.

Increase the number of property owners who subscribe to the email blast system. | ASSUMPTIONS: 1. We currently have roughly 5,000 Property Owners signed up for our email blast notifications. Signing up for email blast notifications is voluntary. It is crucial to stress the importance of being on the list for important information. 2. We will have more traffic directed to our Website by placing the link in our email blasts.

Stakeholder(s):

HHPPOA Staff

HHP Residents

Performance Indicators

Strategy C.6.1 Subscription

Description	Type	Reminders	Start Date	End Date
Remind Property Owners the importance of subscribing to email blast systems for urgent information, POA news and events, and a digital version of Plantation Living.	Target			
	Actual	Ongoing		

Strategy C.6.2 Links & Sign-Ups

Description	Type	Start Date	End Date
Link our Website to every email blast.	Target		
Research feasibility of signing up every property owner for email blasts.	Target		
Continue to evaluate strengths and weaknesses of current email blast company	Target		
	Actual		

D. Covenants

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.

Stakeholder(s)

HHPPOA Covenants Committee

D.1. Communication & Education

COMMUNICATE, educate and increase HHP residents' awareness of both the Covenants and Rules and Regulations.

ASSUMPTIONS: 1. Residents need and appreciate ongoing dialogue concerning Rules and Regulations and compliance.

Performance Indicators

Strategy D.1.1 Information

Description	Type	Violations	Start Date	End Date
Use cost effective media (Plantation Living, HHP website, print) to inform residents of Rules and Regulations and other Covenants issues. ~ Document input from residents concerning Rules and Regulations violations.	Target			
Staff liaison writes monthly articles for Plantation Living to reinforce Rules and Regulations issues.	Actual			

Strategy D.1.2 Violations

Description	Type	Incidents & Trends	Start Date	End Date
Inform residents of the most frequent violations: people, pets, parking, mailboxes, etc. ~ Establish dialogue and correspondence with family members for updates on compliance.	Target			
Staff liaison documents monthly Covenant Activity Reports on actual incidents and trends in violations.	Actual			

Strategy D.1.3 Covenants, Rules and Regulations

Description	Type	Information	Start Date	End Date
Cover Covenants and Rules and Regulations issues with residents at Coffee with Peter. ~ Post current information on agendas and meeting minutes. ~ Present at monthly meetings	Target			
	Actual			

Strategy D.1.4 Noncompliance

Description	Type	Monitoring	Start Date	End Date
Allow residents to report on noncompliance of Rules and Regulations. ~ Monitor developments affecting residents or compliance.	Target			
	Actual	Ongoing		

Strategy D.1.5 Rules & Regulations

Description	Type	Distribution	Start Date	End Date
Periodically distribute revised Rules and Regulations in both electronic and printed format.	Target			
Email blast annually on certain issues.	Actual	Ongoing		

Strategy D.1.6 Registration

Description	Type	Signing	Start Date	End Date
Enforce acknowledgment of the Rules and Regulations by signing for them when registering a new resident.	Target			
	Actual	Ongoing		

D.2. Enforcement

Identify and ENFORCE in a timely manner HHPPOA Covenants and Rules and Regulations.

ASSUMPTIONS: 1. A small number of 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 age or economic circumstances. 4. Contractor compliance issues rise with renewed activity. 5. Flagrant parking issues (commercial vehicles, boats, frequent violations, etc.) 6. Balancing natural versus unkempt appearances.

Performance Indicators

Strategy D.2.1 Inspection Reports

Description	Type	Frequency	Start Date	End Date
Once each calendar quarter, each Committee member will visit their assigned area and report on properties believed not in compliance. ~ Committee members will submit their findings to POA Staff. ~ Committee will monitor frequency of inspection reports submitted to staff liaison.	Target			
	Actual			

Strategy D.2.2 Violations

Description	Type	Validation	Start Date	End Date
Staff liaison will visit the properties and validate reported violations. ~ Covenants Activity Reports	Target			
	Actual	Ongoing		

Strategy D.2.3 Compliance

Description	Type	Achievement	Start Date	End Date
Staff liaison will contact residents to resolve violations. ~ Staff liaison will be proactive in achieving compliance. ~ Staff liaison will notify owner/resident of violation and offer alternatives for compliance as appropriate.	Target			
	Actual			

Strategy D.2.4 Noncompliance

Description	Type	Reviews	Start Date	End Date
Covenants Activity Reports will be reviewed monthly to document status and identify developing trends for consideration of (A) changes to or added emphasis on enforcement or (B) modification to Rules and Regulations. ~ Staff liaison will report trends in monthly Covenants Activity Reports. ~ Review status of properties that continue in non-compliance.	Target			
	Actual			

D.3. Recommendation

Provide WRITTEN recommendations to the HHPPOA Board of Directors to ensure that the Rules and Regulations are supportive of and consistent with the Amended Protective Covenants.

ASSUMPTIONS: 1. Well established and consistently enforced Rules and Regulations enhance property values. 2. Residents support enforcement.

Stakeholder(s):

HHPPOA Board of Directors

Performance Indicators

Strategy D.3.1 Activity Reports

Description	Type	Review	Start Date	End Date
Review Covenants Activity Reports to determine possible needs for changes to Rules and Regulations.	Target	Review annually		
Committee conducts detailed review of Rules and Regulations.	Actual	Review annually		

Strategy D.3.2 Recommendations

Description	Type	Development	Start Date	End Date
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.~ Develop recommendations to Board of Directors for modifications to Rules and Regulations.	Target	Review when needed		
	Actual	Review when needed		

E. Finance

Provide sound, pro-active and farsighted fiscal stewardship through prudent policy establishment, review and management.

Stakeholder(s)

HHPPOA Finance Committee

E.1. Assessments and Income

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. | 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.

Performance Indicators

Strategy E.1.1 Budget

Description	Type	Recommendations	Start Date	End Date
Recommend to the Board a balanced annual budget as developed by the staff - planned income equals planned expense. Reducing year-end cash to cover a budget shortfall will not be implemented. ~ Review the Budget Guidelines 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.	Target			
	Actual			

Strategy E.1.2 Revenues

Description	Type	Oversight	Start Date	End Date
Provide continuing oversight of revenue and expenses versus budget. ~ Review revenue and expenses versus budget on a monthly basis to verify compliance and identify trends.	Target			
	Actual			

Strategy E.1.3 Costs

Description	Type	Recommendations	Start Date	End Date
Seek ways to lower operational costs. ~ Review feasibility of concepts as identified and developed. Recommend possible changes to the Board.	Target			
	Actual			

E.2. Repairs & Replacements

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.

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 \$350,000 annually through 2026. 4. The national economy will not experience inflation, as measured by the CPI-U, in excess of six percent annually and will not experience a significant recession or deflation.

Performance Indicators

Strategy E.2.1 Reserve Funds

Description	Type	Oversight	Start Date	End Date	Dollars
Provide on-going oversight of all reserve funds, including funds held in a separate line item, the operating fund and established credit lines. ~ At the end of each fiscal year recommend the allocation of any Operating Fund balance in excess of \$300,000 to one or more reserve funds, per the then current situation. Review reserve funds status on a quarterly basis. Review invested funds with our advisor annually.	Target				\$300,000.00
	Actual				

Strategy E.2.2 Repairs & Replacements

Description	Type	Oversight	Start Date	End Date
Provide oversight for planned repair and replacement and capital expenditures. ~ Review annual proposed repair and replacement and capital expenditures budgets and make any recommendations prior to Board review and approval.	Target			
	Actual			

Strategy E.2.3 Expenditures

Description	Type	Review	Start Date	End Date
Review approved Repair and Replacement and the Capital expenditures project expenditures. ~ Review expenditures relative to budgeted funds quarterly.	Target			
	Actual			

Strategy E.2.4 Revenue Generation

Description	Type	Recommendations	Start Date	End Date
	Target			
Maintain a standing subcommittee to investigate potential POA revenue generating initiatives. ~ Sub-committee to report to the full committee on semi-annual basis. Provide any recommendations to the Board.	Actual			

Strategy E.2.5 Risk

Description	Type	Monitoring	Start Date	End Date
Monitor risk elements ~ Review insurance coverages and any special situations annually and make recommendations to the Board.	Target			
	Actual			

E.3. Financial Controls & Policies

As directed by the Board, review existing financial controls and investment policies and make recommendations to the Board as needed.

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 low.

Performance Indicators

Strategy E.3.1 Financial Policies

Description	Type	Review	Start Date	End Date
Periodically review current financial policies and recommend revisions to the Board as appropriate. ~ Schedule review with staff in odd numbered years.	Target			
	Actual			

Strategy E.3.2 Financial Controls

Description	Type	Review	Start Date	End Date
Periodically review current internal financial controls and recommend revisions to the Board as appropriate. ~ Schedule review with staff in odd numbered years or as required.	Target			
	Actual			

Strategy E.3.3 Investment Results

Description	Type	Optimization	Start Date	End Date
Optimize investment results consistent with the existing Investment Policy. Recommend any changes to the existing Investment Policy as appropriate. ~ Attend and provide comments as appropriate at the annual pre-audit and audit review meetings.	Target			
	Actual			

Strategy E.3.4 Investment Returns

Description	Type	Monitoring	Start Date	End Date
Monitor investment return. ~ Obtain stable returns while meeting risk limitations as stated in the existing Investment Policy. Evaluate and recommend any changes to the Board.	Target			
	Actual			

E.4. Audit Process

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. ~ ASSUMPTIONS: If the same auditing firm is employed for more than five years, the lead auditor will be changed every five years.

Performance Indicators

Strategy E.4.1 Controls

Description	Type	Recommendations	Start Date	End Date
Recommend any specific controls to be addressed in the annual audit process to the Board. ~ Make any recommendations prior to the pre-audit meeting with the Board.	Target			
	Actual			

Strategy E.4.2 Audit

Description	Type	Monitoring	Start Date	End Date
Monitor the annual audit process. ~ 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.	Target			
	Actual			

DEMONSTRATION ONLY

F. Maintenance

Provide recommendations for routine scheduled maintenance and hear updates on unscheduled projects.

Stakeholder(s)

HHPPOA Maintenance Committee

F.1. Maintenance Programs

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, other, and other buildings
 - c. Roads and leisure paths
 - d. Lagoons and lakes
 - e. Drainage system
 - f. Dolphin Head Recreation Area, Pine Island and extended shoreline including the Bluff revetments, lagoon system, and salt marshes
- 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).

Performance Indicators

Strategy F.1.1 Property Inspections

Description	Type	Assignments	Start Date	End Date
One or two members of the Maintenance Committee will be assigned to one of the geographic areas within the Plantation to make annual property inspections and report findings. ~ Review annually	Target			
Assignments were made for 2020; reports are scheduled beginning with the September committee meeting.	Actual		2020-01-01	2020-12-31

Strategy F.1.2 Maintenance

Description	Type	Review & Recommendations	Start Date	End Date
At the monthly meetings, the Committee members will review the ongoing maintenance schedule and practices as it applies to six asset classes listed above. ~ 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. ~ Review beginning third quarter of 2020	Target			
	Actual			

Strategy F.1.3 Benchmarking

Description	Type	Review	Start Date	End Date
Identify other communities in our area with similar characteristics and initiate benchmark programs to compare the maintenance of HHP's six asset classes with the other communities over the next five-years. ~ Adopt comparison categories for each strategic asset class. ~ Review beginning third quarter of 2020	Target			
	Actual			

F.2. Customer Satisfaction

Gauge customer satisfaction from annual 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.

ASSUMPTIONS: 1. The customers are property owners (residents) of HHP. 2. Communications Committee will support the Maintenance Committee.

Stakeholder(s):

HHP Property Owners

Performance Indicators**Strategy F.2.1 Survey & Input**

Description	Type	Information	Start Date	End Date
Use the triennial resident survey and input from the Communications Committee to gather information. ~ Provide questions related to community maintenance of POA assets for use in the triennial resident survey next planned for 2021.	Target		2021-01-01	2021-12-31
Previously applied customer satisfaction measures are in place.	Actual		2021-01-01	2021-12-31

Strategy F.2.2 Satisfaction

Description	Type	Sources	Start Date	End Date
Use multiple sources to obtain customer feedback and gauge satisfaction. ~ Information may be obtained from response to articles in the Plantation Living newsletter, website surveys, and periodic pre- and post-personal interviews ~ Use Plantation newsletter to update residents on actions taken relating to property maintenance.	Target			
	Actual			

Strategy F.2.3 Feedback

Description	Type	Evaluation	Start Date	End Date
Regularly review satisfaction. ~ Work with the Communications Committee to utilize the Plantation website to elicit and accept resident input ~ Evaluate resident feedback as appropriate.	Target			
	Actual			

F.3. Capital Improvements

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. | 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.

Stakeholder(s):

HHPPOA Maintenance Committee

Director of Maintenance

General Manager

Performance Indicators

Strategy F.3.1 Capital Projects

Description	Type	Review	Start Date	End Date
Continue the annual process for review of Capital Improvements that is currently being used. ~ Review Capital projects at monthly committee meetings, as required, and conduct an Annual Review of the overall Capital Projects list. ~ Review annually beginning in third quarter 2020.	Target			
	Actual			

F.4. Storm Water Management

Review the five-year 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.

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 and is effective and acceptable to the Town as a description/status update of the HHP storm water system.

Stakeholder(s):

Town of Hilton Head

HHPPOA Board

Performance Indicators

Strategy F.4.1 Storm Water Management

Description	Type	Effectiveness	Start Date	End Date
Strategy F.4.1. Monitor the effectiveness of the Storm Water Management System annually. ~ Update the Storm Water Management System Map as appropriate, highlighting water sheds to major outfalls. ~ Highlight locations on the map displaying the interaction between golf course drainage and lagoons leading to the major outfalls.	Target			
	Actual			

Strategy F.4.2 Agreement

Description	Type	Monitoring & Review	Start Date	End Date
Review Agreement with Town of Hilton Head to verify that it covers priorities established by HHPPOA for the upcoming performance period. ~ Review Agreement for compliance relative to priorities and data generated by the Map. ~ Monitor annually and report any response from the Town to POA Board	Target			
	Actual			

Strategy F.4.3 Value

Description	Type	Monitoring & Reporting	Start Date	End Date
Monitor value received from Agreement with Town of Hilton Head. ~ 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. ~ Monitor annually and report replies from the Town	Target			
	Actual			

Strategy F.4.4 Plans & Projects

Description	Type	Monitoring & Reporting	Start Date	End Date
Prepare annual action plans to address any deficiencies found from items 1-2 above. ~ Plan annual plans to HHPPOA Board for approval. ~ Monitor progress of work on approved plans and report completion of projects	Target			
	Actual			

F.5. Signage & Landscaping

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.

ASSUMPTIONS: Work to achieve community agreement and understanding around our definition of terms and the resulting value proposition for each project.

Performance Indicators

Strategy F.5.1 Projects

Description	Type	Review & Recommendations	Start Date	End Date
Review projects brought forward to the Maintenance Committee. ~ Recommend acceptable or rejection of proposed projects based on cost, upkeep, savings, etc. ~ As needed to provide application clarity	Target			
	Actual			

Strategy F.5.2 Projects

Description	Type	Prioritization	Start Date	End Date
Develop a prioritized list of approved projects showing the value proposition for each project and anticipated costs/savings over time. ~ Update the list for new or changed projects ~ Annually in timely fashion for MTC Operating Plan process	Target			
	Actual			

Strategy F.5.3 Beautification & Sustainability

Description	Type	Project Evaluation	Start Date	End Date
Add a "Beautification and Sustainability" value question to community survey. ~ Maintenance Committee working in cooperation with the Communications Committee ~ Monitor annually with survey results; reevaluate the proposed projects, the definition of terms and value proposition for each project	Target			
	Actual			

F.6. Dolphin Head Recreation Area

Develop a long-range maintenance plan for the renovated Dolphin Head Recreation Area.

Performance Indicators

Strategy F.6.1 Dolphin Head Recreation Area

Description	Type	Plan	Start Date	End Date
Follow the process used to develop the maintenance plan for Spring Lake Pool and apply it to the renovated Dolphin Head Recreation Area. ~ Review any staff and cost changes during the first year (warranty period) then again in subsequent years. Integrate the renovated Dolphin Head Recreation Area into the three-year POA neighborhood survey. ~ Update annually during the first two years	Target			
	Actual			

F.7. Lakes & Lagoons

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.

Stakeholder(s):

Town of Hilton Head

Performance Indicators

Strategy F.7.1 Dredging

Description	Type	Plan	Start Date	End Date
Proposed a long-term plan for dredging community lakes and lagoons within HHP. ~ Review one year after agreement with the Town; in subsequent years review every three-years when the POA neighborhood survey is conducted. ~ Update annually	Target			
	Actual			

DEMONSTRATION ONLY

G. Recreation

Provide creative and stimulating recreational facilities and programs that are adaptable to the changing needs and diversity of our residents.

Stakeholder(s)

HHPPOA Recreation Committee

G.1. Programs

Review existing recreational programs to keep them interesting, stimulating and adaptive to our changing needs.

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.

Performance Indicators

Strategy G.1.1 Survey

Description	Type	Analysis	Start Date	End Date
Review and analyze the HHP 2021 Survey responses and the HHP 2024 Survey responses to anticipate changes and needs in recreation. ~ Survey results will serve as the measure ~ Completion - 2022 and 2025 respectively	Target			2022-12-31
	Actual			2022-12-31
Review and analyze the Survey responses to anticipate changes and needs in recreation.	Target			2025-12-31

Strategy G.1.2 Recommendations

Description	Type	Issuance	Start Date	End Date
Based on Survey, analyze recreational trends and make recommendations to POA Board. ~ Opinion Survey and resident input. ~ Completion - 2022 and 2025 respectively	Target			2022-12-31
Based on Survey, analyze recreational trends and make recommendations to POA Board.	Target			2025-12-31
	Actual		2022-12-31	

Strategy G.1.3 Programs

Description	Type	Variety, Effectiveness & Participation	Start Date	End Date
Research and evaluate the variety, effectiveness and level of participation in programs in other planned communities. ~ Subcommittee Report ~ Review annually	Target			
	Actual			

Strategy G.1.4 Volunteerism

Description	Type	Start Date	End Date	Number
Encourage volunteerism. ~ Review # of guests invited to Volunteer Party. ~ Review annually	Target			
	Actual			

Strategy G.1.5 Staffing & Volunteers

Description	Type	Review	Start Date	End Date
Review staffing and volunteer needs. ~ Review monthly management reports. ~ Review annually	Target			
	Actual			

G.2. Facilities

Inspect and evaluate existing recreational facilities to ensure that they are properly equipped, well-maintained and suitable to the changing needs of our residents.

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.

Performance Indicators

Strategy G.2.1 Facilities

Description	Type	Research	Start Date	End Date
Research community to determine if a new or renovation of a facility is required to meet resident's needs for meeting and athletic uses. ~ Surveys – 2024 ~ Completion 2024	Target			2024-12-31
	Actual			2024-12-31

Strategy G.2.2 Partnerships

Description	Type	Exploration	Start Date	End Date
Explore private industry / HHP partnership opportunities to enhance recreational opportunities. ~ Review annually	Target			
	Actual			

Strategy G.2.3 Facilities

Description	Type	Maintenance	Start Date	End Date
Maintain interior of present facilities (excluding major mechanical items) at least at current level. ~ Review annually	Target			
	Actual			

G.3. Spring Lake & Plantation House

Consider the need for Phase IV of the Spring Lake Master Plan, the renovation/replacement of the Plantation House, and a Dog Park adjacent to the Plantation House.

ASSUMPTIONS: Community supports the need for Phase IV of the Spring Lake Master Plan, as well as renovating or replacing the Plantation House (with consideration of a Dog Park adjacent to the Plantation House); the plan is endorsed by the Board. • The Dolphin Head Recreation Area is paid off by 2024 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.)

Performance Indicators

Strategy G.3.1 Feedback

Description	Type	Survey	Start Date	End Date
Obtain resident feedback. ~ Survey 2024 ~ Completion 2024	Target			2024-12-31
	Actual			2024-12-31

Strategy G.3.2 Plan

Description	Type	Evaluation & Recommendations	Start Date	End Date
Evaluate the Plan and recommend a course of action to the Board of Directors. ~ Evaluation of Plan completed ~ Completion 2025	Target			2025-12-31
	Actual			2025-12-31

Strategy G.3.3 Financial Plan

Description	Type	Completion	Start Date	End Date
Work with the Finance Committee to develop a financial plan to fund project. ~ Financial Plan completed ~ Completion 2025	Target			2025-12-31
	Actual			2025-12-31

G.4. Dolphin Head Recreation Area

Complete the second phase of the Dolphin Head Recreation Area project if the project was split into two phases.

ASSUMPTIONS: Community supports competing Phase 2 of the Dolphin Head Recreations Area project. The Plan is endorsed by the Board. • We have accumulated the funds to replenish the Weather Casualty Fund, and there is money accrued in the Capital Fund to continue the project.

Performance Indicators

Strategy G.4.1 Feedback

Description	Type	Meetings	Start Date	End Date
Obtain resident feedback. ~ Hold community meetings throughout the planning process. ~ Completion 2026	Target			2026-12-31
	Actual			2026-12-31

Strategy G.4.2 Financial Plan

Description	Type	Completion	Start Date	End Date
If there is a Phase 2, work with the Finance Committee to complete Phase 2; if approved by the Board. ~ Financial Plan completed ~ Completion 2026	Target			2026-12-31
	Actual			2026-12-31

DEMONSTRATION ONLY

H. Security

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.

Stakeholder(s)

HHPPOA Security Committee

HHP Guests

HHPPOA Board

HHPPOA Staff

HHP Residents

H.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.

Performance Indicators

Strategy H.1.1 Training

Description	Type	Compliance	Start Date	End Date
HHPPOA training standards and protocols mandate new officers become fully trained within 24 months of hiring. ~ Compliance with SLED performance standards.	Target			
	Actual	Ongoing		

Strategy H.1.2 Reports & Records

Description	Type	Training	Start Date	End Date
Consider the demands of the administrative function (reports and records) on the department and make appropriate recommendations to the Board. ~ Implement as part of new officer routine training.	Target			
	Actual	Ongoing		

Strategy H.1.3 SOPs

Description	Type	Updating	Start Date	End Date
Review SOPs (Standard Operating Procedures). ~ SOPs current	Target			
	Actual	Ongoing		

Strategy H.1.4 Officers & Staff

Description	Type	Visibility	Start Date	End Date
Increase visibility of individual officers and other staff of Departments. ~ Use newsletter, coffees, and events	Target			
	Actual	Ongoing		

Strategy H.1.5 Retention

Description	Type	Plans	Start Date	End Date
Develop plans for long-term retention of Security Department personnel. ~ Seek Board support and approval of plans. Keep salary levels competitive. ~ Annually with Budget requests	Target			
	Actual			

H.2. Crime Prevention

Minimize the incidences of crime in HHP.

Performance Indicators

Strategy H.2.1 Crime

Description	Type	Minimization	Start Date	End Date
Continue residents' education to aid in minimizing crimes of opportunity. Expand use of Safety Alerts. ~ Publish statistics raise resident awareness through Plantation Living, coffees, etc.	Target			
	Actual	Ongoing		

Strategy H.2.2 Alarm Systems

Description	Type	Installation	Start Date	End Date
Encourage residents to install alarm systems. ~ Follow up on statistics. Measure and report the percentage of homes alarmed via the survey mechanism. Add alarm question in Annual mailing.	Target			
	Actual	Ongoing		

Strategy H.2.3 Crime Statistics

Description	Type	Evaluation	Start Date	End Date
Review crime statistics to evaluate the effectiveness of the HHP crime prevention program. ~ Publish crime statistics showing trends. Compare statistics month to month and year to year in HHP versus other PUDs.	Target			
	Actual	Ongoing		

Strategy H.2.4 Crime Prevention

Description	Type	BCSO Coordination	Start Date	End Date
Continue to coordinate and integrate the resources of the BCSO into the Security Department's crime prevention program. ~ Periodically evaluate coordination efforts with representatives of the BCSO.	Target			
	Actual	Ongoing		

Strategy H.2.5 Tip Line

Description	Type	Implementation	Start Date	End Date
Implement a Tip Line Program ~ Publish program in Plantation Living and on Website.	Target			
	Actual	Pending approval		

H.3. Traffic Safety & Control

Maintain efforts to reduce the number of traffic accidents; to minimize traffic congestion and prevent unnecessary entry delays at the gates, especially with regards to special events.

ASSUMPTIONS: Our present program must be continually updated to address new circumstances.

Performance Indicators

Strategy H.3.1 Accidents

Description	Type	Analysis	Start Date	End Date
Complete an annual analysis of accident types and causes. Analyze accident data to pinpoint enforcement, education, equipment and engineering needs each year. (Security Committee Task) ~ Use the Monthly Report provided to the Security Committee and Board of Directors to publish a synopsis in Plantation Living. ~ Annually in first quarter of each succeeding year	Target			
	Actual			

Strategy H.3.2 Streets & Intersections

Description	Type	Survey	Start Date	End Date
Complete a Plantation-wide survey of the streets and intersections: (Security Committee Task) a. Speed limits b. Signage c. Visibility for drivers and other engineering considerations ~ Intersection/street survey completed, and results submitted.	Target			
	Actual	Ongoing		

Strategy H.3.3 Speed Signs

Description	Type	Implementation	Start Date	End Date
Continue use of Radar Speed Signs ~ Implementation	Target			
	Actual	Ongoing		

H.4. Resident Assistance

Find ways of meeting the ever-increasing needs for resident assistance without negatively affecting other departmental responsibilities.

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.

Stakeholder(s):

HHP Residents

Performance Indicators

Strategy H.4.1 Service Levels

Description	Type	Research	Start Date	End Date
Research the relationship of calls for service to the cost of adding new officers to maintain the level of service we now provide. (Security Committee Task) ~ Review results showing frequency and cost of service calls.	Target			
Ongoing in the second quarter each year.	Actual	Ongoing		

H.5. Operational Efficiency

Monitor and review new technologies, operational equipment, and facility assets to cost effectively enhance the success and safety of Security Department personnel.

ASSUMPTIONS: Ever changing technologies require continued evaluation.

Performance Indicators**Strategy H.5.1 Operations**

Description	Type	Surveys & Reviews	Start Date	End Date
Systematically survey and review operations to pinpoint areas for improvement. ~ Security operational reviews and technological advances examined.	Target			
	Actual	Ongoing		

Strategy H.5.2 Systems & Techniques

Description	Type	Evaluation	Start Date	End Date
Evaluate new systems and enforcement techniques to include: Technologies, officer and departmental equipment, physical plants, and vehicles.	Target			
New approaches brought to Security Committee for initial evaluation of possible HHP use.	Actual	Ongoing		

Strategy H.5.3 Systems & Technologies

Description	Type	Plans	Start Date	End Date
After a new system/technology is identified as potentially of use in HHP, develop and recommend an action plan based upon needs, priorities, and both practical and financial feasibility. ~ In-depth evaluation and report to Board of Directors/ General Manager for funding. Strategy H.5.4. When an item from #3 is funded, make periodic presentations to the POA Board on progress of its implementation. 1. 2. 3. 4. Implementation of approved projects. 1. 2. 3. 4. Ongoing	Target			
	Actual	Ongoing		

H.6. Resident Education

Develop methods and means to better educate residents about the responsibilities and operation of the Security Department and its staff.

Stakeholder(s):**HHP Residents****HHPPOA Security Department**

Performance Indicators

Strategy H.6.1 Training & Authority

Description	Type	Explanation	Start Date	End Date
Explain training of officers and their authority within the Plantation. ~ Presentation at a meeting of the Newcomers Club; Coffees (as invited), and monthly column in Plantation Living.	Target			
	Actual	Ongoing		

Strategy H.6.2 Lockbox Program

Description	Type	Information	Start Date	End Date
Inform residents about lockbox program. Add Lockbox question to Annual mailing. ~ Presentation at Coffee with Peter, Newcomers Club (as invited), column in Plantation Living. Add Lockbox question to Annual mailing.	Target			
	Actual	Ongoing		

Strategy H.6.3 House Check Program

Description	Type	Information	Start Date	End Date
Inform residents about the Vacation House Check Program. ~ Presentation at a meeting of the Newcomers Club, column in Plantation Living.	Target			
	Actual	Ongoing		

Strategy H.6.4 Ride Along Program

Description	Type	Participation	Start Date	End Date
Initiate a "Ride Along" Program for members of the Security and Safety Committee, Board and interested residents. ~ Assess participation	Target			
	Actual	Ongoing		

H.7. Animal Control

Maintain an adequate control program (training, procedures, and facilities).

Performance Indicators

Strategy H.7.1 Animal Requirements

Description	Type	Review	Start Date	End Date
Review current State, County, and Town requirements relating to domestic and wild animals to identify possible improvements in HHP program. ~ Report results to Security Committee annually and to Board of Directors as warranted.	Target			
	Actual	Ongoing		

Strategy H.7.2 Articles

Description	Type	Start Date	End Date	Number
Educate residents via Plantation Living concerning animal issues. ~ Three to four Plantation Living articles per year on animal issues.	Target			3
	Actual			Ongoing

Strategy H.7.3 Dog Chipping

Description	Type	Encouragement	Start Date	End Date
Encourage “chipping” of all dogs via Plantation Living. ~ Coordinate chipping events with the HHP Dog Club.	Target			
	Actual	Ongoing		

H.8. Disaster Response

Maintain and constantly review an adequate Disaster Response Program for both man-made and natural disasters, and a Hurricane Evacuation and Reentry Plan (training, procedures, equipment and facilities, etc.).

Performance Indicators

Strategy H.8.1 Procedures

Description	Type	Review	Start Date	End Date
Review current State, County, Town and HHP procedures to identify possible shortcomings and improvements in the current HHP plans. ~ Report results to General Manager, Security Committee, and to Board of Directors as warranted for funding.	Target			
	Actual	Ongoing		

Strategy H.8.2 Needs

Description	Type	Implementation	Start Date	End Date
Implement identified needs as appropriate and budgeted. ~ Identified needs in place and functioning. ~ Annually by the end of the second quarter.	Target			
	Actual			

Strategy H.8.3 Advice

Description	Type	Communication	Start Date	End Date
Communicate Disaster Preparedness advice to residents. Review same on Web pages. ~ Conduct a general meeting of residents to present the current Disaster Response advice and overview Hurricane Evacuation and Re-entry Plan. Review Web page. ~ Review Web page advice annually in first quarter. Plan presentation annually early in the second quarter.	Target			
	Actual			

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