

August 7, 2007

**CONSULTANT'S RECOMMENDATION  
For  
LAKE FOREST YACHT AND COUNTRY CLUB  
Based Upon  
2007 PROPERTY OWNERS SURVEY**

**OVERVIEW**

The property owners in the Lake Forest Community completed the survey with 818 questionnaires returned for an overall response rate of 26%. This response provides a 95% level of confidence that the survey results would have a small margin of error. McMahon Group is therefore able to make recommendations based upon the survey findings.

The residents' overall satisfaction with the Lake Forest Community and its amenities is weak with only 44% satisfied, 24% neutral, and 32% dissatisfied. From the survey tabulation, it shows that younger residents are more dissatisfied than older residents.

The residents' overall satisfaction with the club and the recreation facilities and program is lower than that for the community in general. The majority of residents (52%) do not feel they receive good value for the costs associated with the Property Owners Association facility and services. Again, this is age-biased with much more younger members feeling good value is not being provided. The survey identified specific fees as the represented good value, and swimming received the worst rating, with golf receiving the best rating.

**SATISFACTION RATINGS FOR ASSOCIATION ACTIVITIES AND SERVICES**

All Property Owners Association activities received a 30% or higher dissatisfaction rating except for golf with 26% dissatisfaction. The most important Property Owners Association activities of communications, management, governance, and covenant enforcement had poor ratings for satisfaction, with dissatisfaction ranging from 57% to 36%. Such high dissatisfaction needs to be significantly improved.

**CLUBHOUSE AND YACHT CLUB FACILITIES**

The clubhouse/golf proshop/19<sup>th</sup> hole building only had 13% of the residents that like it "as is." The yacht clubhouse was even worse with only 10% of the residents liking it "as is." Both buildings need improvement, and the survey results show what needs to be done.



## **MOST IMPORTANT IMPROVEMENTS**

The most important potential Property Owners Association improvements are:

1. Repair main clubhouse and yacht clubhouse.
2. Provide casual grill and outdoor dining at main clubhouse.
3. Add a health/fitness facility.
4. Provide a summer camp program.
5. Build a lakeside park facility.
6. Improve marina boat slips.
7. Eliminate two Yacht Club tennis courts to provide storage and parking.

In regards to funding facility improvements, the average amount of additional fees that residents would pay is \$6/month. Based upon McMahon's experience with capital campaigns, the community could raise the fee up to double this \$6 amount, if the program included the most important projects as identified in the survey.

McMahon Group recommends proceeding with a facility improvement program inclusive of allowing all residents to vote on it.

## **DINING**

Over two-thirds of the residents never have a dinner meal in the Property Owners Association dining offerings. While the main clubhouse's 19<sup>th</sup> hole had better satisfaction ratings than the Yacht Club, all ratings were poor except for speed of service in the 19<sup>th</sup> hole. One has to seriously wonder if the Property Owners Association should not subcontract out all food service outlets. Seventy-two (72%) of the residents agree the Property Owners Association should study having an outside operator for the Yacht Club dining service.

## **GOLF**

Again, all aspects of both golf courses received poor satisfaction ratings. The nine-hole course has such poor ratings, the Property Owners Association should most likely consider closing this course, or spend the money to improve it. Based upon 69% of residents favoring some public use of the golf courses, this should be seriously considered. The Property Owners Association should also consider having an outside management company to manage and maintain the two courses. A financial feasibility report needs to be done on golf.

## **TENNIS**

The number and location of the tennis courts has good resident satisfaction, but the programming aspects, proshop and availability of food/beverage had significant dissatisfaction. The club needs to improve tennis, and it should probably eliminate the two courts at the Yacht Club.

## **SWIMMING**

All pool locations received very poor satisfaction ratings on all aspects of the pools. The residents want the pools to remain in their existing locations. However, they want improvements made on the lack of shade, appearance, furniture, bathhouse facilities, and providing food and beverage.

## **STRATEGIC PROPERTY OWNERS ASSOCIATION ISSUES**

The survey tested important community issues with clear direction being received as follows:

1. Residents do not want to study locating all facilities at the main clubhouse location.
2. The use of an outside dining operator at the Yacht Club should be studied.
3. Some public use of the golf courses should be studied.
4. The improvement of the marina with the city of Daphne should be studied.
5. The community should have a Political Action Committee for Daphne issues.
6. The stable property should be considered for trading or selling to fund a lakeside park.
7. The Community Covenants should be revised to better address homeowner violations.

## **WHAT TO DO WITH THE PROPERTY OWNERS ASSOCIATION FACILITIES**

The residents were very clear that they want the Property Owners Association to renew its covenants so as to preserve the Association and the maintenance of community amenities.

## **WRITE IN COMMENTS AND SUGGESTIONS**

The survey respondents provided 1,350 suggestions regarding the Property Owners Association with a summation being:

1. Enforce covenants.
2. Repair the roads.
3. Sell or lease out all facilities.
4. Fix up the lake.
5. Provide sidewalks.
6. Eliminate dues.
7. Make pool usage free.
8. Improve the dining.
9. Raise dues to fund improvements.
10. Where does the current Property Owners Association fee go?



## CONCLUSION

The survey results show the need and support for many community improvements. The Property Owners Association Board needs to properly communicate the survey results to all members. Then the facility and operational improvements need to be done.

In closing, I look forward to presenting the survey results when it is convenient.

Respectfully submitted,

**McMAHON GROUP, INC.**

William P. McMahon, Sr., AIA  
Chairman

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