

2014-2018 STRATEGIC PLAN

Glenmore Community Association



STRATEGIC PLANNING COMMITTEE

Terry Pemberton, Chair

Ben Benjamin

Nancy Gansneder

Trevor Joscelyne

Bob Strotz

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Acknowledgements

To: Glenmore Community Association Board of Directors

From: Terry Pemberton, Chair of the Strategic Planning Committee

Re: Glenmore Community Association 2014 – 2018 Strategic Plan

The last 18 months since the Strategic Planning Committee was officially formed has been an unusually busy time for the Glenmore Community Association (GCA). During this period a number of issues and opportunities presented themselves to our all-volunteer committee. An extensive *Glenmore Community Survey* was conducted in the data-gathering phase of our work in the fall of 2013 and we were pleased that 75% of all households responded. Armed with the survey responses we addressed and debated the role and key strategic objectives of the GCA over the next 5 years.

Sincere thanks go out to the many residents who completed the Glenmore Community Survey and to the many GCA committee chairs and members who provided us both background information as well as their best assessment of future needs. Our five member volunteer planning staff brought a range of perspectives to the various issues and was composed of Club and non-Club members as well as Board members. Members of the Strategic Planning Committee who worked countless hours over the past 18 months were Terry Pemberton, Ben Benjamin, Bob Strotz, Nancy Gansneder, and Trevor Joscelyne.

We submit this plan as key recommendations to be considered by the Board as it strives to maintain and improve the quality of life in the community. Although the Board may of course make changes to these recommendations, we encourage the final Strategic Plan be shared with all GCA members. In the very least we hope that the *Community Survey* and results be shared with all members, as a separate document should the entire plan not be disseminated.

Respectfully submitted on behalf of the Strategic Planning Committee,

Terry Pemberton, Chairman



Executive Summary

In May 2013, the Glenmore Community Association (GCA) Board formed a committee to prepare a five-year strategic plan. The committee was asked to (a) study the recommendations in the previous five-year plan to determine what actions were taken by the Board and with what outcomes, (b) determine which of the recommendations not pursued should still be considered, (c) examine the current operations and procedures of the GCA and make recommendations for improvement, and (d) consider future developments within Glenmore and adjacent properties in terms of how those might impact the quality of life and property values in Glenmore. As part of the data gathering functions of the committee, a survey was sent electronically to 652 Glenmore households. Seventy-five percent of all households responded, and those responses guided a number of the recommendations listed below.

As the homeowners association for Glenmore, the GCA has four primary roles: (1) to maintain and improve common areas and roads, (2) to manage access to the community via the gatehouse, (3) to provide enforcement of the Covenants and Regulations that impact the community environment, and (4) to act as appropriate to protect the interests of the community as a whole and protect property values. The 2014-2018 Strategic Plan was developed to help the GCA better accomplish those four roles. To that end, we identified five strategic objectives. Those five are listed below with a summary of recommendations to the Board regarding each of them. This new strategic plan is not intended to prescribe actions to be undertaken by the GCA in the next five years. Rather it is a list of recommendations to be considered by the Board and its committees as they work to maintain and improve the quality of life in the community.

Strategic Objective A - Perform required functions effectively and efficiently.

Maintenance of Roads, Common Areas, Ponds, Storm Water, and Walking Paths and Trails

- Commission an updated master roads plan based on the consultant's report, and re-examine the frequency of road re-surfacing.
- Reduce destruction along roadsides with installation of white posts in construction traffic areas and repair roadsides promptly when damaged.
- Employ a qualified consultant to analyze the condition of the three ponds and carry out a bathymetric study to determine if safety ledges and siltation build-up need remediation.
- Install a fountain in Piper Pond; develop a regular program for fish restocking.
- Continue repairs of deficiencies in storm water infrastructure as needed and build those costs into GCA budget.
- Create an *ad hoc* committee on Walking Paths to plan for and encourage the use of additional walking paths and trails, especially in newly developed areas.
- Add more pet waste receptacles to walking paths.

Gatehouse, Safety and Security

- Plan for extensive maintenance and refurbishment of the aging gatehouse.
- Evaluate the potential use of remote gatehouse management during the evening hours.
- Consider speed tables, humps, or other traffic calming alternatives to deter speeding.

Enforcement of Covenants and Regulations

- Communicate and educate Glenmore residents via the GCA newsletter regarding what kinds of C&R infractions are occurring and how these are being addressed.
- Work with realtors encouraging them to educate potential buyers about the C&Rs prior to purchase.

Architectural Approvals

- Engage with Glenmore Associates to encourage transfer to the GCA of 100% of the ARB responsibility.

Communication

- Continue to move toward email for distribution of all GCA communications.
- Appoint a Communications Committee to guide and develop GCA communications.

Administration: Records and Insurance

- Significantly increase the use of cloud storage for GCA records.
- Restrict physical storage only to those documents that must be maintained as such by law.
- Adjust insurance amounts to cover increased dues and reserve funds, as well as liabilities associated with the soccer field and basketball court if deeded to GCA.

Strategic Objective B - Ensure Sustainable Organization and Management Structure

- Transform the Board of Directors from an operational board to a policy board.
- Build a broader network for Board membership through recruitment of individuals new to serve on GCA committees.
- Create a new Social Committee that will coordinate with the Glenmore Country Club in organizing quarterly welcoming events for new Glenmore residents.
- By 2016, create an ad hoc committee to review current GCA staffing and management and make recommendations regarding the possible need of professional management for some or all GCA functions.

Strategic Objective C - Ensure Proper and Transparent Fiscal Management

- Evaluate and introduce more efficient methods of handling accounting tasks.
- Take advantage of automated bank account redistribution services for multiple bank accounts.

Strategic Objective D - Accommodate and Influence Future Developments***Glenmore Country Club***

- Continue to explore with the GCC ways to increase the percentage of Glenmore residents who enjoy some level of club membership.

Glenmore Equestrian Center

- Protect Glenmore property values by completing the planned GCA purchase of the roughly 61-acre property so that the rural nature of the property can be assured for the long term.

Rivanna Village and Entrance Corridor

- Ensure that the buffer zone is landscaped and maintained in such a way that will offer, to the extent possible, the wooded look currently in place.

- Work with the County Board of Supervisors and others to reverse VDOT's resistance to construction of a new entrance from Rt. 250 to handle construction traffic for Rivanna Village.

Carroll Creek Bridge

- Work with the County during 2014 and 2015 to ensure timely construction of the new bridge.

Soccer Field and RV Parking Lot

- Work with the Glenmore Associates to transfer management of the soccer field to GCA.
- When that is finalized, seek a maintenance agreement with the owner of the RV lot concerning the access road adjacent to the soccer field.

Second Glenmore Entrance

- Make an application to the County in 2015-2016 to establish a second Glenmore entrance/exit via Running Deer Road.
- Investigate the nature and cost of an electronically operated gate at that site.

Ownership of Common Areas and Roads

- Work with Glenmore Associates to facilitate the handover of remaining common areas, residue parcels, and roads, including Sections S and Q2 and the area outside the gatehouse to the east of Glenmore Way.

Strategic Objective E - Improve the Appeal of Glenmore and Enhance its Property Values

- Work with developers to add more walking paths in new developments.
- Create a Beautification Committee to explore the addition of more attractive landscaping, especially along the lengthy divided portion of Piper Way.

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2014 – 2018 Strategic Plan

Glenmore Community Association

I. PREFACE

Unencumbered with the turmoil of the past, the GCA Board of Directors in May 2013 empowered a Strategic Planning Committee to complete a new five-year strategic plan. Composed of a mixture of new and long-time Glenmore residents, new volunteers and experienced board members, and club and non-club members, the committee brought a range of perspectives to the discussion.

The focus of the previous 2008-2012 GCA Strategic Plan centered on the transition from “developer managed” to “GCA managed” responsibilities. This new 2014-2018 GCA Strategic Plan builds upon the financial stability of the GCA and focuses on clarifying relevant unknowns confronting the GCA - namely the impact of future development both inside and outside the gates and the future of the Country Club and Equestrian Center.

II. GLENMORE VISION, MISSION, & DESCRIPTION

The Strategic Plan Committee has defined the following Vision and Mission Statements to guide the contents of this plan:

VISION STATEMENT

To maintain and enhance Glenmore as a premier residential gated community, rich in beauty, timeless in design, and enduring in value.

MISSION STATEMENT

The Glenmore Community Association and its Board of Directors are responsible to Glenmore property owners for managing GCA affairs in a transparent, efficient, and effective manner in accordance with Covenants and Restrictions of Glenmore and the Association bylaws, so as to perpetuate and enhance the Glenmore Community vision.

DESCRIPTION OF GLENMORE

Glenmore is a gated community of single-family homes just east of Charlottesville, incorporating a Country Club, Equestrian Center, and privately maintained roads. It currently includes 835 lots containing 770 homes, with an additional 140 new sites planned for future homes.

The Glenmore Community Association (GCA) is the homeowners association for the community, which has four primary roles: (1) to maintain and improve common areas and roads, (2) to manage access to the community via the gatehouse, (3) to provide enforcement of the various covenants and regulations which impact the community environment, and (4) to act as appropriate to protect the interests of the community as a whole and protect property values.

The Glenmore Country Club is a privately owned businesses located within Glenmore. The GCA has no direct responsibility for its operation, but because it provides value to the community and effects property values, the GCA endeavors to work in cooperation with it to the benefit of the community. The GCA holds a Right of First Purchase on the Country Club. In August 2014 the GCA contracted to purchase the Equestrian Center property from its private owners, and continue to provide equestrian facilities primarily as an amenity for residents, while protecting the land from future development.

The GCA is guided by its Articles of Incorporation, Bylaws, and the Declaration of Covenants and Restrictions of Glenmore (C&Rs). All Glenmore property owners become members and agree to be bound by the C&Rs when they purchase Glenmore property. A seven-person Board of Directors governs the Association; its members elect six of them for two-year terms and the owner of the Country Club appoints one. A team of part-time volunteer staff reporting to the Board of Directors carries out the day-to-day responsibilities. Annual dues are collected from GCA members to pay for GCA operations.

The original developer, Glenmore Associates LP, no longer has any involvement in GCA decision-making or activities. Much of the land containing undeveloped lots has now been sold to other developers, but Glenmore Associates does retain the power of veto on any changes to the Covenants and Restrictions, and controls the Architectural Review process for new construction. Better Homes & Gardens/Real Estate III is owned by the same family as Glenmore Associates, and retains a real estate sales office within Glenmore.

III. REVIEW OF PROGRESS VERSUS 2008-2012 STRATEGIC PLAN

In early 2008 the GCA issued the previous Strategic Plan covering the years 2008 to 2012. The Association has undertaken substantial changes since then, many of which were anticipated in the plan, but many were not. **Appendix A** contains a list of the plan's key recommendations, together with an assessment of the extent to which they were subsequently adopted.

Significant progress has been made in adopting the recommendations of the 2008-2012 Strategic Plan and developing the GCA into an organization essentially independent of the developer, with a stable support staff and healthy finances.

IV. NOVEMBER 2013 GLENMORE COMMUNITY SURVEY

In preparation for this Strategic Plan, we carried out a survey of owners and residents in November 2013. Responses to the survey are included as **Appendix B**. Overall, the survey revealed a generally high satisfaction with both the community and the way the GCA is handling its responsibilities. These responses have been important in determining appropriate objectives and recommendations that are described in the following sections.



V. STRATEGIC OBJECTIVES

The Strategic Plan Committee has identified five Strategic Objectives that are necessary in order for the GCA to achieve its Mission:

- A. Perform required functions effectively and efficiently**
- B. Ensure sustainable organization and management structure**
- C. Ensure proper and transparent fiscal management**
- D. Accommodate and influence future developments**
- E. Improve the appeal of Glenmore and enhance its property values**

The rest of this section assesses the status of each objective, together with recommendations of actions to be taken within the five-year horizon.

Strategic Objective A - Perform required functions effectively and efficiently

A.1 Property operations and maintenance

Roads

Current Status: The GCA has responsibility for maintenance of all Glenmore roads. Strategically, the condition of our roads is critical to maintaining the quality of the community, and consumes almost 30% of the GCA annual budget. Following an unsuccessful attempt in 2008 to use slurry-seal to extend the life of road surfaces, a five-year Roads Master Plan was developed with the help of an external consultant and adopted by the Board in 2009. Over the last five years, half of all roads have been overlaid with 1.5 inches of new asphalt pavement, and others have had patches and cracks sealing performed. Each spring the Roads Committee inspects all roads for winter damage and adjusts the paving schedule for the current year, taking into account the Roads Master Plan recommendations.

A roads reserve account of \$250,000 has been funded, but not yet used, as we have been able to budget between \$210,000 and \$250,000 each year from operating expenses without the need for additional emergency repairs. A consultant has been contracted to update the Roads Master Plan in early 2014, including a re-assessment of the conditions of the roads, and the development of new paving priority schedules. Repaving costs are directly related to the average life expectancy of newly paved roads; there is some evidence that roads are lasting longer than assumed in the Master Plan.

Recommendations:

- Use an updated master plan, prepared by the external consultant, to guide road maintenance, and ensure a high quality road system.
- Examine the frequency of re-surfacing roads as part of the 2014 Roads Master Plan update, with a view to optimizing frequency of new overlays.
- Regularly patrol road edges and ameliorate damage due to parking and construction vehicles.
- Install more green & white posts at construction sites and in locations where traffic patterns indicate erosion of roadsides.

Common Areas and Ponds

Current Status: About 30% of the GCA's budget goes to maintenance of the Common Areas and ponds. The common areas provide much of the ambiance of the community, and maintaining these in good condition with appropriate landscaping is one of the key roles of the GCA. Some areas are left in a natural state; others are landscaped, such as the road medians. Responsibilities include three ponds, multiple walking paths, two park areas, and common green space within the community. In addition to mowing, activities include refurbishment of signs, tree trimming, clearance of vegetation, repair and repaving of paths, repairing vehicle barriers, bridge painting, inspection of dams for State and County reports, and maintenance of ponds and fountains.



The entrance corridor is an important element in defining the nature of the community. Recent re-plantings at the gatehouse and both entrance signs on Glenmore Way have enhanced the entrance corridor's attractiveness, and a new water supply has been laid so that more flowering plants and shrubs can be used in the future. However, there are few other flowerbeds within the common areas of Glenmore.

All maintenance work is performed by contractors, and coordinated by a staff volunteer Maintenance Manager on behalf of the Common Area Review Board (CARB).

Recommendations:

- Consistent with the vision of this plan, identify locations where the community would benefit from further beautification, specifically using planted flowerbeds.

Storm water

Current Status: Prior to 2013, little maintenance was done on the storm-water infrastructure throughout Glenmore, much of which is now 20 years old. The GCA Board of Directors has recently made a strategic decision to invest in storm water infrastructure repairs and improvements. Having the storm water infrastructure perform in the manner for which it was designed can best protect the safety of Glenmore residents. Not only will this allow the GCA to reverse the trend of deterioration of certain parts of the infrastructure, but it will help position the community to better meet the future increased regulation of storm water.

According to a recent report, 70% of the streams in Albemarle County do not currently meet water quality standards. Carroll Creek, which runs through much of Glenmore, is one of those. We will undoubtedly face tougher storm water standards in the future, as Albemarle County is required to implement actions to improve water quality to meet the new requirements of the Chesapeake Bay Act. Glenmore residents will very likely be faced with storm water fees (or "rain taxes") as Albemarle County struggles to find the money to fund storm water improvement projects. We have already witnessed the City of Charlottesville adopting a storm water fee. While Albemarle County has not yet adopted a similar fee, it is only a matter of time before it follows suit.

A complete engineering drawing of the Glenmore storm water infrastructure system has been created for the first time. Ten storm water improvement projects have been included in the 2014 GCA budget.

Recommendations:

- Continue repairs of deficiencies in storm water infrastructure, and build their cost into future GCA annual budgets
- Monitor the development of new storm water regulations and fees.
- Monitor the storm water handling in the proposed Rivanna Village development. Small tributaries of Carroll Creek flow through that property and the Glenmore portion of the Creek could be adversely affected by the new development.
- As the GCA takes ownership of new Common Areas (such as section Q2, Pendower Heights, and the Preserve), monitor the development, operation and maintenance of the storm water treatment infrastructure that is required to be installed as part of the permitting process.

Walking Paths and Trails

Current Status: Access to walking and riding trails is important to the nature of our community. The GCA maintains these paths and trails. Our existing mixed-use trails are generally in good condition and extensively used by dog walkers, equestrians, hikers, and joggers. The County now owns and mows the Rivanna Trail. The Equestrian Center assists with maintenance of the Camp Branch Trail, a new trail connecting to Cambridge Hill Lane, including the removal of fallen trees. The GCA contracts for the maintenance of Carroll Creek and Pendower Trails including mowing, removing fallen trees and clearing of intruding brush from those trails.

There are no trails on the Preserve area the east of Carroll Creek, despite there being extensive and picturesque rural areas within private estate-sized lots.

Walking paths and riding trails were often cited as a valued amenity in the Glenmore Community Survey (GCS) and 45% of respondents supported additional walking paths.



Recommendations:

- Extend walking paths to include Darby, Farrington, Pendower, Carroll Creek, Newbridge, and Devon Pines to provide an arterial walking trail network throughout Glenmore.
- Create an *ad hoc* committee on Walking Paths to make recommendations to the Board on care, maintenance and use of Glenmore walking paths including:
 - Connect the walking trails to the walking paths through Glenmore CC between the 17th and 18th holes.
 - Promote the use of walking paths and trails
 - Restore the old trail that goes up the ridge from Carroll Creek Trail to the new Preserve section.
- Approach property owners in the Preserve section east of Carroll Creek Road regarding opening one or more country trails through their properties for use by residents.

Animal Control

Current Status: Wildlife (deer, geese, vultures, and the occasional bear and coyote) and domestic pets (dogs and cats) are part of the landscape of a rural residential community. All are a significant challenge to our community. Currently Glenmore Country Club culls deer on its property. A multi-method approach has been undertaken to help the turkey vultures find another home. As efforts to relocate geese have waned in recent years, their numbers have increased. Many dog owners continue to fail to pick-up doggie do or leave bags along the roadside.

Two-thirds of respondents to the GCS indicate strong or moderate support for increasing efforts to reduce the deer population. Dogs and management of dog waste were often cited as “...things that contribute most to your DISSATISFACTION...”. Dog owners cited the need for more receptacles for waste, while others cited the management of dog barking, behavior, and waste as a problem.

Recommendations:

- *Add more waste receptacles to walking paths.*

A.2 Gatehouse and Controlled Access

Current Status: Glenmore is a gated community, meaning that we control the access of incoming vehicles 24 hours a day. The specific goal of the gatehouse is to eliminate uninvited visitors. In addition, the gatehouse manager has a vehicle used for patrolling the community to look for potential violations of GCA policies. Drivers of vehicles must either be personally known to the gatehouse staff as approved visitors, or be invited by the resident in advance. The resident is called by phone if no such permission has been given. The GCA has recently introduced software which allows expected visitors to be registered either by the gatehouse staff or directly on-line by residents. Residents can also update their own personal information such as family members and vehicles. The software also provides printed passes with directions to the resident’s address. License Plate Recognition, that provides automated entry to residents and up to two of their non-resident family members without requiring modifications to vehicles, was implemented in 2012.

It should be noted that there are still ways for someone with criminal intent to enter the community, particularly by foot, and also as a passenger in a known vehicle or a member of a contractor’s crew. Our current assessment is that attempting to further restrict such access is unwarranted.

Staffing, training, uniforms, and certification is contracted to Securitas, who have provided good service for the last six years. Occasionally some staff members have proved to be unacceptable and were replaced, but this is not uncommon for the security business. However, we are fortunate to have retained the same gatehouse manager for many years.

Recommendations:

- Plan for extensive maintenance and refurbishment of the heavily used and ageing gatehouse building throughout the next five years.
- Plan for a replacement of the software and hardware used to track residents, vehicles, and visitors. As a result of continuously developing technologies it is likely to become obsolete prior to 2019. Its replacement, which would most likely be a fully cloud-based package, may incur greater costs.
- Evaluate the use of remote gatehouse management during nighttime. (Securitas, like other security companies, is now offering remote monitoring, where an operations center controls the

gatehouse gate remotely using video links during off-peak evening and nighttime hours, with a patrol vehicle available to be sent to Glenmore in the case of problems.)

A.3 Safety and Security

Safety and security for Glenmore residents fall into two distinct categories: the safety of residents' homes and possessions, and the safety of Glenmore's roads.

Safety of Residents' Homes

Current Status: The gatehouse succeeds in keeping out uninvited vehicles, but this does not make residents immune to thefts, vehicle break-ins, home break-ins, or vandalism within the community, some of which we know to have been carried out in the past by residents' family members. Off-duty police are being employed to carry out random patrols, mostly at night. The Security Liaison Committee operates as a direct interface with the Albemarle County Police Department, and has resulted in excellent cooperation in attempting to eliminate crime. The last few years have seen a significant improvement.

Recommendation:

- Adjust the frequency and therefore cost of off-duty patrols according to changes in reported criminal activity. Greater publicity should be given to this activity.

Safety of Glenmore's Roads

Current Status: The incidence of reported accidents on Glenmore roads is extremely small. Nevertheless, many residents perceive speeding as a major concern. There are certain roads, such as Darby Road through the Scottish Homes, which are increasingly used by vehicles accessing other parts of Glenmore, but have no walking path, so are perceived to be more dangerous.

Speeding is a challenge to every homeowner community, especially those with private roads. Solutions usually include aggressive policing, speed monitoring devices, and speed humps/tables. The problem we face is that these solutions tend to be as unacceptable as the problem they are trying to resolve. For this reason, successive GCA boards have chosen not to adopt such measures and instead have encouraged residents and visitors to obey posted speed limit signs.

Recommendation:

- Consider introducing speed tables, humps, or other traffic calming alternatives as an experiment in one location of Glenmore, so as to judge its impact on residents and vehicles. If successful, such measures could be introduced elsewhere. If not, then they should be removed.

A.4 Compliance with Covenants & Restrictions & GCA Regulations

Current Status: Following the recommendation of the 2008-2012 Strategic Plan, a mechanism to insure compliance with the C&R and regulations as they relate to owner property upkeep and maintenance was implemented. Procedures and protocols were put into place to provide for the systematic handling of infractions. Functionally, C&R compliance was separated from Maintenance and a member of the board was charged with its oversight. The Compliance Officer spends about three hours per week on compliance issues, addressing about three issues per month. The vast

majority of infractions are resolved with a “Friendly Reminder” letter. In the past three years only one infraction has resulted in a hearing before the board.

Fewer than 10% of survey respondents indicated they were dissatisfied (8.4%) or very dissatisfied (0.8%) with the “enforcement of property covenants and restrictions.” Indeed the number of infractions has remained consistently low; fewer than 5% of property owners annually, receive ‘friendly reminders’ while the number of residents has steadily increased and 20% of Glenmore residents have moved here in the last three years.



Recommendations:

- Maintain current method of monitoring and enforcing compliance with C&Rs.
- Implement changes to increase satisfaction with enforcement of C&Rs:
 - Report via the newsletter violations so residents know what kinds of things are infractions and that the C&Rs are being enforced.
 - Arrange orientation for new residents, possibly combined with the GCC.
 - Post summary of C&Rs that are clear and concise, by topic, and all in one place.
 - Send regular reminders via the newsletter of C&Rs. Possible “did you know” feature
 - Encourage informal neighbor to neighbor approach to resolving problems
 - Work with realtors reminding them of C&Rs and encourage them to educate potential buyers regarding C&Rs prior to purchase.
 - Continue use of volunteer staff compliance officer. Infractions are few, time spent is minimal, and the current staffing method is personal, neighborly, and cost effective.

A.5 Architectural approvals

Current Status: The Glenmore Architectural Review Board (ARB) handles architectural approvals for all new buildings and landscaping. Until recently this was totally controlled by the developer, Glenmore Associates (GA). In 2013 an agreement was reached to provide for three voting members, two representatives from GA and one appointed by the GCA Board. Although GA still has a majority vote, the inclusion of the GCA vote is mandatory, and ensures that appropriate communication and consideration of residents’ views take place. The ARB generally meets once or twice a month.

A separate GCA committee, the Architectural Review Committee (ARC), was formed in 2010, which reviews modifications to existing homes and landscaping. This committee handles about 10 applications per month, typically with a site visit and a follow-up report of approval or modifications needed to gain approval.

Recommendation:

- Work with GA toward a transition to full responsibility for both administration and approvals of new home construction.

A.6 Communications

Current Status: Communications play an important role in instilling confidence that the Association is functioning appropriately in their interests. The way GCA communicates with its members has evolved significantly in recent years, and is now almost entirely electronic. We no longer issue quarterly newsletters by mail, having migrated to a monthly email format. This is backed up by a website that contains comprehensive information about the GCA, providing owners the ability to view meeting minutes and regulations, update their own gatehouse information and email addresses, and contact any GCA official by email. The website has been modified to be easily accessible from tablets and smart phones. New residents are now provided with a booklet about the GCA, and submit their email contact information as part of their registration with the gatehouse.

By law, we are required to issue notices of Annual or Special Meetings to all members, and may only use electronic communications if the owner has provided permission for this. We have almost 200 owners who have not elected to do so, which requires us to prepare and mail a full packet each year to them. Many of these are either older residents, or are non-resident property owners. However, for the remaining 600 owners, all communication, including dues invoicing and on-line voting, is now handled electronically.



We do not directly provide an independent forum for residents to share views or reactions, as is required by recent changes to the Virginia Property Owners Association Act. But we believe the current adoption by many residents of the *NextDoor Glenmore* social website effectively fulfills this function.

Recommendations:

- Continue to advocate the use of email to minimize physical distribution costs.
- Continue to handle communications using a part-time volunteer staff. The workload will only increase marginally as Glenmore expands, and many residents have relevant skills, making this a cost-effective approach.
- Evaluate the use of social media such as Facebook, Twitter, and *NextDoor Glenmore* to communicate with those residents who use these services. The Community Associations Institute now recommends the use of social media for these purposes.
- Appoint a Communications Committee to guide and develop GCA communications.

A.7 Other Administration

Records

Current Status: Record-keeping has been a challenge to the Association for many years. In the last two years we have scanned and copied all governing documents and many others to 'the cloud', which is accessible to board members, and other association members by request. Many documents are also available to members on the website. The GCA has already migrated to 100% digital records of monthly board meetings. Additionally, we maintain hard copies of the most important documents

in a locked filing cabinet located in the Country Club. Because we do not operate from an office, other records remain, of necessity, distributed among the homes of the various volunteers dealing with them. This includes most of our financial records, as well as many of the subcommittee records.

Recommendations:

- Significantly increase the use of cloud storage, given the availability of cheap and dependable cloud services.
- Develop a mechanism to permit functional experts and committee heads to upload documents directly to storage, rather than relying on the records administrator.
- Restrict physical storage to only the most important documents, which are required by law to be physically maintained.

Insurance

Current Status: The GCA maintains five insurance policies, consistent with the requirements of Virginia law and our Covenants & Restrictions. These are (1) General Liability Policy, (2) Directors & Officers Liability Policy, (3) Vehicle Liability Policy, (4) Umbrella Policy, and (5) a Fidelity Bond.

Recommendations:

- Adjust the amount of fidelity insurance to reflect the future increased levels of dues and reserve funds.
- Review additional insurance to cover the use of the soccer field and basketball court at the time they are deeded to the GCA.

Strategic Objective B - Ensure sustainable organization and management structure

Current Status: A seven-member board of directors currently governs the Glenmore Community Association. Glenmore owners elect six of the directors at large. The Glenmore Country Club appoints one director. Changes to the C&Rs and Articles of Incorporation in 2010 (which increased the term of elected board members from one to two years, staggered the election of directors to three members each year, and converted the Bremerton Cottage director to a sixth at-large director) strengthened the continuity and function of the Board of Directors.

The GCA Board of Directors functions as both a policy and operational board. Each board member serves on or chairs one or more of the standing or special committees of the Board. Board members also oversee the activities of volunteer staff who are responsible for bookkeeping/accounting, compliance with C&R, communications/membership, records administration, and property maintenance.

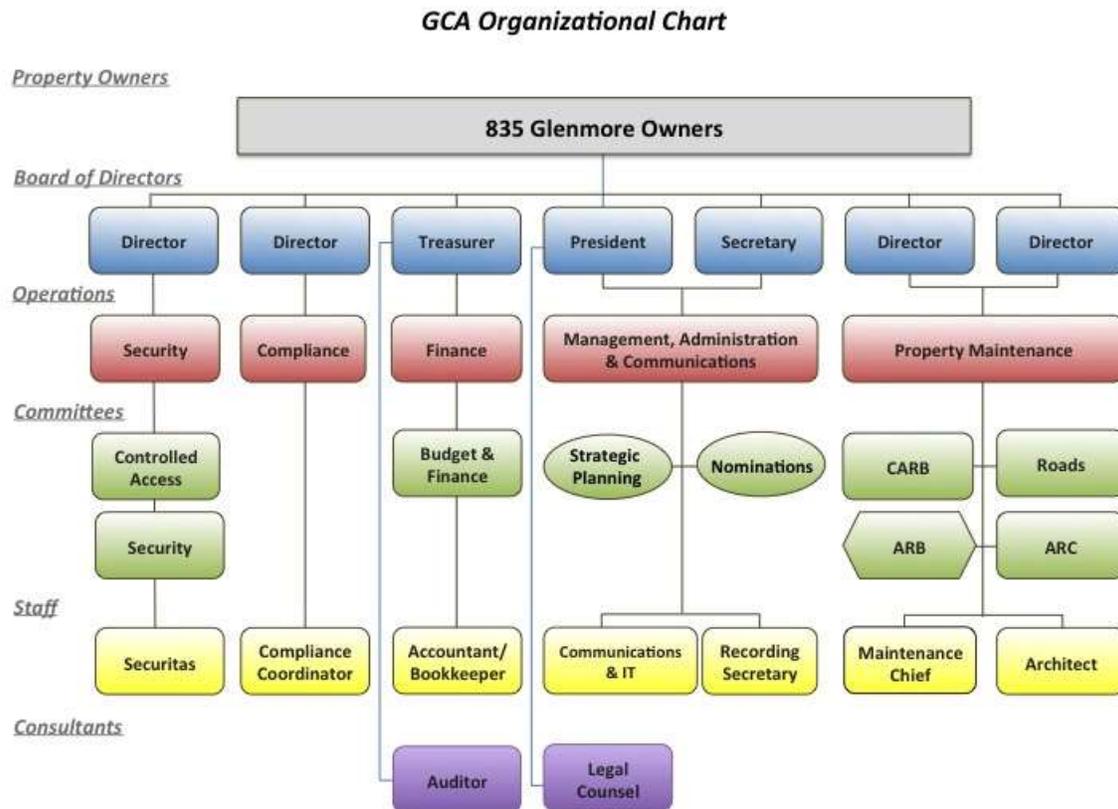
In addition to the GCA board, nearly **two-dozen** Glenmore owners provide numerous hours of service to the community through their voluntary work on seven standing committees and two special committees. These are:

- **Common Area Review Board**
- **Architectural Review Committee**
- **Architectural Review Board**
- **Roads Committee**
- **Controlled Access Committee**
- **Security Liaison Committee**
- **Budget & Finance Committee**

- **Strategic Plan Committee**
- **Nominating Committee**

Details of their function and membership of each committee can be found on the GCA website (glenmore-community.org).

The following chart depicts organizational and operational structure of the GCA:



Fewer than 2% (30 people) of the Glenmore owners oversee and/or directly provide for the day-to-day governance and operations of our community. Many serve in multiple capacities. The collective talent and dedication of these individuals is admirable. However, the GCA has limited bench strength. While there is no shortage of talent and expertise among Glenmore owners, only a small number serve either on committees or on the Board of Directors.

Glenmore owners appear to be satisfied with GCA operations and few support hiring a professional management company to manage Glenmore. To maintain and enhance GCA governance and operations, a greater number of Glenmore owners need to become actively involved with the GCA.

Aware that the GCA may soon reach a size and complexity that will require certain aspects of the GCA to be administered by professional property management personnel, we have included allowance for this possibility in the financial projections.

Recommendations:

- Involve a greater number of Glenmore owners in the GCA:
 - Transform the BOD from an operational board to a policy board.

- Appoint BOD members to serve as liaison to standing committees, but not serve as the chairperson.
- Use Standing Committees as a feeder system to identify potential candidates for the Board of Directors
- Recruit and appoint additional volunteers for Standing Committees to reduce individual service on multiple committees and broaden the breadth and depth of Committee membership
- Formalize work and composition of Nominating Committee:
 - Establish committee comprised of, at least, the immediate two former board presidents and one former board member.
 - Begin its work six months prior to elections.
- Increase visibility and importance, both fiscal and civic, of serving on GCA committees:
 - Enhance Committee web pages to provide details about duties and responsibilities, time commitment, term of office and an on-line application.
 - Annually, publically recognize GCA board members and other volunteers for their service.
- Create a new standing committee - Social Committee. This committee will organize, in cooperation with the Glenmore Country Club, quarterly welcoming events that orient new owners to GCA and its functions and Glenmore CC and its amenities; and design and implement other events that strengthen a sense of community.
- By 2016, create a special committee to review current GCA staffing and operations and make recommendations regarding the need for professional management.

Strategic Objective C - Ensure proper and transparent fiscal management

Current Status: A part-time volunteer staff, Bookkeeper/Accountant, who reports to the Treasurer, successfully performs GCA day-to-day accounting functions. Having the services of an active or retired CPA in this role provides valuable insight and service to the community. A recently updated set of Financial Policies and Procedures is in place that defines detailed processes for handling invoices, checks, and receipts of payments and assessments, and establishes appropriate divisions of responsibility to guard against abuse. The GCA has established QuickBooks Online as its accounting tool that provides the Treasurer and other board members with full visibility to all accounting transactions and reports. Access is also available to members on request.

Annual audits are carried out by an independent accounting firm, and have shown a clean bill of health for the last four years. Automated electronic payments have been recently introduced for recurring utilities to minimize workload. The Budget and Finance Committee provides ongoing oversight of accounting operations in addition to preparing budgets for the GCA.



Recommendations:

- Evaluate and introduce more efficient methods of handling accounting tasks as the workload increases. These could include electronic payment plans for dues, use of lock-box services for dues collection, electronic distribution and approval of invoices, and on-line payment of all invoices.
- Investigate automated bank account redistribution services, which would allow the GCA to avoid the proliferation of deposit accounts due to the \$250,000 limit on federal insurance, while holding a higher proportion of its cash in interest bearing accounts.

Strategic Objective D - Accommodate and influence future developments

D.1 Future of Glenmore Country Club

Current Status: One of the major considerations over the timeframe of this Strategic Plan is the future of the Glenmore Country Club. Glenmore homes surround property belonging to the Club. The beauty of this land and the GCC facilities are an essential contribution to the nature of the community. A Glenmore resident family privately owns the club, and cooperation between the GCA and the Club is good.

Currently just over 60% of residents are club members. This limited membership presents two challenges to the community:

1. Although the Club's financial condition has improved significantly since its purchase by the current owners, and is expected to be close to break-even in 2014, its revenue is still short of what is needed for the club to become self-sustaining for the long term. There are widespread examples of clubs that have allowed standards to fall due to financial pressures, and have resulted in significant reductions in homeowners' property values.
2. The community lacks cohesion because the GCA is unable to provide facilities for use by all residents such as a social center with meeting rooms, and swimming pool. Both of these are generally provided by homeowner associations in communities like ours, and add to the appeal of a community.

In 2013 the GCA employed an independent consultant to better understand the club's potential viability. The consultant advised that a substantial increase in membership base is needed in order to ensure a stable, quality Country Club for the long term and recommended that Glenmore migrate to a community where a minimum level of club membership is required of all Glenmore residents.

Subsequently the BOD identified three approaches to resolving the above challenges:

1. Require All Property Owners to Become Club Members

The simplest approach would be to define a minimum level of club membership, and make this mandatory for both new and existing Glenmore residents. This would permit some reduction in current GCC fee levels, which would be collected as part of GCA dues. It would undoubtedly ensure the long-term survival of the Club, and all residents would be contributing to its ongoing operation. However, after careful consideration, the GCA BOD felt it would place an unreasonable burden on those current residents who moved into the community with no expectation of joining the Club, and still have no interest in doing so.



2. Require Future Property Owners to Become Club Members

The second approach would be to require all future home purchasers to become Club members, but 'grandparent' existing residents who are not members. This solution is more complex, and would require making reductions to Club fee levels such that the total GCA fees including membership were compatible with costs at other communities with similar facilities. While satisfying the long-term goal, this approach reduces short-term Club revenues. Consideration was given to adjusting GCA dues and fees such that all residents, whether Club members or not, would contribute something towards the Club's maintenance. The GCA board and the Club owners worked extensively during 2013 to jointly formulate an approach that would be acceptable to both the Club and the GCA, but after many hours of analysis and meetings, were unable to find a financially sound solution that was acceptable to both parties.

3. Plan for the GCA to Purchase the Country Club

The third approach would be for the GCA to purchase the Club. It may be the most difficult to achieve, but is the only solution that fully protects the long-term interests of all GCA members, and puts the GCA in full control of its destiny. This option has not yet been evaluated by the board, but may require financing via bonds or loans that would have to be paid for through GCA dues. A specialist management company would need to be recruited to oversee the Club's operations. Some defined level of membership could be automatically included within GCA dues, beyond which the club would provide incremental membership facilities for additional fees. An additional benefit would be the elimination of real estate taxes, because it would be managed as a non-profit Common Area facility of the GCA.

The GCA retains a right of first purchase, which means it must be provided an opportunity to buy the Club before it is offered for sale to another party. The Club owners have made it clear that their preferred way of transferring ownership would be selling it to the GCA. However, if the GCA chooses not to purchase the Club, it will most likely be sold to one of the two following groups:

- a) A corporation experienced in club management: On the one hand this solution would provide a satisfactory solution to the community, because such corporations bring experience, staffing, and purchasing benefits. On the other hand, this scenario runs the risk that the club could be mismanaged, allowing the quality of maintenance or facilities to fall. The Club could also decide to open itself to daily fee sports activities for the public, which would change the nature of both the Club facilities and the amount of visitors coming through the community. The GCA would have no voice in this.
- b) A private consortium of residents, or existing club members, through some type of equity membership investment: In this scenario, an external management company would most likely be hired to run the Club on behalf of its owners. This scenario has the advantage that, because the owners are residents themselves, they have a vested interest in maintaining standards. But again, the GCA would have no say in the way the Club is run.

After considering all of the above, the Strategic Plan Committee recommends that the GCA begin the process of evaluating the implications of purchasing the Country Club. It may be that the cost of the

GCA purchasing the Club would gain insufficient support from GCA members as a whole. However, we feel that the opportunity is important enough to deserve full evaluation.

Recommendations:

- In order to protect the long-term interests of residents, evaluate the financial and management implications of purchasing and operating the Country Club, and communicate these with GCA members.
- Take advantage of the Right of First Purchase by preparing a rapid response plan that would provide guidance should the present owners decide to sell the Country Club.

D.2 Future of Glenmore Equestrian Center

Current Status: At the Special Meeting of the Association held on 10th July 2014, the resolution to purchase the 60.8 acre Equestrian Parcel as GCA Common Area was approved by our members. The voting participation was remarkable. Over 90% of members voted, with an almost 3 to 1 majority in favor of the purchase. A subsidiary corporation, Glenmore Farms Inc., has been established by the GCA to manage the equestrian center activities. The directors of this corporation are volunteer residents appointed by the GCA, but otherwise act independently. Two of its directors are GCA board members.



Recommendations:

- The Glenmore Farms board should manage the equestrian operations to fulfill two criteria:
 - The Equestrian Center should operate primarily as an amenity to Glenmore residents
 - It should remain financially self-supporting.
- The GCA Board should review annually the ongoing viability of the operation. If the equestrian activities cannot be sustained, other rural uses for the land should be explored.

D.3 Rivanna Village & Entrance Corridor

Current Status: Key to the beauty of Glenmore is the entrance to the community. The roads into the gatehouse are bordered by the beautiful fenced pastures of the equestrian center on the west and woods on the east. There is a beauty and tranquility to that entrance that many regard as a signature feature of Glenmore. It is critical that the GCA Board take steps to maintain, as much as is feasible, the visual appeal of that entrance corridor.

The Rivanna Village is to be built along the east side of Glenmore Way. This will add an adjacent community of 342 to 400 home sites and 20,000 to 60,000 square feet of commercial space. The Village will substantially affect the traffic on Glenmore Way and the current pastoral appeal of the corridor to the east of Glenmore Way will disappear.

The County of Albemarle approved the final re-zoning in July 2014 and development of the Village most likely will commence in early 2015.

However, the GCA board must remain diligent in ensuring that the development has minimal negative impact on both the community and property values. The provision of a substantial buffer between the road and the nearest buildings must be maintained. Additionally, during the extended construction phase, we need to ensure that construction traffic uses the planned new entrance to the Village from Route 250 instead of Glenmore Way. At the time of writing the GCA board is still in negotiations with the developer and VDOT to try to achieve this.



Recommendations:

- Ensure a buffer zone is provided along Glenmore Way and Piper Way, landscaped in a way that will maintain, to the extent possible, the wooded look currently in place.
- Maintain pressure with VDOT and the developer to overcome resistance to using an alternate entrance from Route 250 for construction traffic.
- Work with the County and developer to encourage the majority of future traffic flow in and out of the Village directly from Highway 250, thus minimizing traffic on Glenmore Way.

D.4 Carroll Creek Bridge

Current Status: Carroll Creek Road crosses Carroll Creek over a 'temporary' crossing, which does not meet VDOT road design standards, is susceptible to flooding, and is potentially hazardous to vehicles. In August of 2011 Albemarle County agreed to permit its continued use until the earliest of (A) final approval of the plat for the 51st lot in the Leake development, or (B) December 31st, 2015 at which time a new bridge and modified road must have been constructed. A detailed plan must be presented to the county by December 15th, 2014. This section of the road has not been deeded to the GCA, and it is the responsibility whoever then owns the Leake development property, to carry out this construction.

Recommendations

- Work with the county during 2014 and 2015 to ensure a timely construction of the new bridge.

D.5 RV Parking Lot

A Glenmore resident family privately owns the RV parking lot. This is essentially a community facility, which would lend itself to being owned and managed by the GCA. The county has stipulated that it must remain a community facility, so there is little benefit for the GCA to spend funds to buy it. An ongoing problem is that the driveway from Carroll Creek Road is part of this property, but is used by residents for parking at the soccer field, and requires routine maintenance.

Recommendation:

- Seek a maintenance agreement with the owner of the RV Lot concerning the access road adjacent to the soccer field. This should be done at the time the GCA takes ownership of the soccer field from Glenmore Associates.

D.6 Second Glenmore Entrance

Current Status: Most of the projected growth in Glenmore is in the south and east of the community, which is furthest from the gatehouse, with residents having to travel well over two miles through Glenmore roads before reaching the gatehouse. Additionally, much of the traffic will flow along roads via section Q2, Devon Pines, and Darby Road, which are not suited to these volumes of traffic. One solution is to change the emergency exit from Carroll Creek Road onto Running Deer Road into a second (unstaffed) gated entrance. This would be particularly convenient for residents living on the east side of Carroll Creek.

Albemarle's Planning Commission and Board of Supervisors debated the idea in 2006 at the time rezoning of these areas, but in response to strong objections by residents of Running Deer Road they rejected the proposal. Because many more Glenmore residents would benefit from the use of such an entrance in the next few years, and because both the Planning Commission and Board of Supervisors have new members, a second Glenmore entrance should be re-visited.

Recommendation:

- Make an application to the county in 2015 or 2016 to establish a second Glenmore entrance via Running Deer Road.
- Investigate the nature and cost of an electronically operated gate that would permit entrance and exit at this second site.

D.7 Interaction with Albemarle County

Current Status: All development within Glenmore is subject to approval by Albemarle County, which follows rigorous review and hearing processes. The GCA has no legal basis on which to represent residents on planning issues unless a specific vote of members has been taken on an issue, as a result the GCA needs to tread cautiously in its attempt to influence the county representatives and staff. However, the GCA has provided a variety of inputs to the county on previous planning issues.

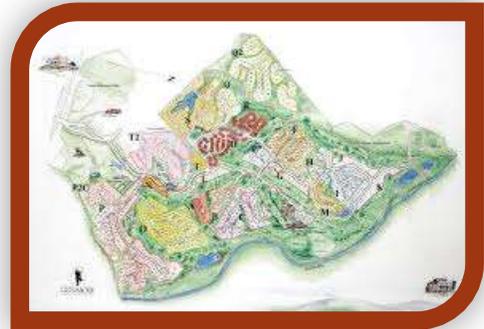
Recommendation:

- Continue to work with county staff to keep abreast of planning issues, inform residents about them, and encourage participation where appropriate. This strategy has worked successfully for several years.

D.8 Ownership of Common Areas & Roads

Current Status: In 2010 the developer deeded the majority of both roads and common areas within Glenmore to the GCA. Some additional common area parcels were deeded in early 2014. But the following remain under the ownership of the developer:

- Recently constructed roads, including the new section of Carroll Creek Road
- Common areas within Section S and Section Q2, and Pendower Heights
- The soccer field and areas surrounding the Waste Water Treatment Plant
- A residue parcel, on the right, as one exits the community.



In accordance with the Covenants & Restrictions of Glenmore, the developer may choose the times at which roads and common areas are deeded to the GCA, regardless of residents' wishes.

Recommendations:

- Work with Glenmore Associates to facilitate the handover of remaining common areas, residue parcels, and roads. This includes Sections S and Q2, and the area outside the gatehouse to the east of Glenmore Way. The soccer field should also be included, and maintained by the GCA as a high quality recreational area for residents.
- Evaluate in 2015 the option of managing the soccer field area as a community resource, regardless of whether ownership has been transferred.

Strategic Objective E - Improve the Appeal of Glenmore and Enhance its Property Values

Current Status: Based on the 2013 Glenmore Community Survey results, resident satisfaction in Glenmore is very high. Ninety-one percent of respondents indicated that they are "satisfied" or "very satisfied" with living in Glenmore. When asked what appeals to them most, respondents' most frequently mentioned the attractive homes and setting, the privacy and security afforded in a gated community, and the amenities of the Glenmore Country Club (GCC). Other reasons included the beauty of the entrance to Glenmore, the walking paths and trails, the family-friendly environment, and the strong sense of community. When asked what improvements might be made to Glenmore, three suggestions were endorsed by more than 40% of the respondents: adding more social events, adding additional walking paths, and adding more attractive landscaping.

Glenmore has been a growing community since its inception; however actions in the next five years foretell a period of especially rapid change. New areas of development and buildings on vacant lots will eventually add 200 new homes to Glenmore, increasing the size of the community by over 25%. The bulk of this expansion will take place over the next five years.

Most of the goals associated with sustaining the appeal of Glenmore have been addressed in previous sections, but two additional ones are worth pursuing.

Recommendations:

- Work with developers to add more walking paths where possible in new developments.
- Create a Beautification Committee to explore the addition of more attractive landscaping within Glenmore, including along the considerable length of the divided portion of Piper Way that is so critical to the visual image of the community.

VI. FINANCIAL PROJECTIONS

We anticipate that the number of dues-eligible lots will increase from 778 in 2013 to 872 in 2018. Annual dues will need to increase steadily throughout the next five years from \$857 to \$1,132 per lot, a faster rate than we have experienced in the past. In addition to inflation (2%), the main factors leading to these dues increases are:

- Purchase of Glenmore Farm – The purchase of the Glenmore Farm in 2014 combined a special assessment, the use of some unrestricted reserves, and the addition of loan repayment charges to future operating expenses. We have assumed the Glenmore Farm will break-even going forward.
- Storm Water Management – In 2013 GCA began a program of storm-water management infrastructure repairs. This will become an ongoing additional expense item.
- Professional GCA Property Management – We have assumed that, beginning in 2017, some of the administration functions of the GCA will be taken over by property management professionals, rather than the existing volunteer staff. This will add to operating costs.
- Reserve Account Contributions – Every homeowners association is required to maintain cash reserves to fund large expenditures that are not part of normal annual operating expenses, many of which are unpredictable. Examples include one-time repairs to infrastructure such as dam repairs, recovery from severe storm damage, and replacement of the security vehicle and gatehouse equipment. These are known as “restricted” reserves or the Reserve Account. In recent years the Reserve Account has been 100% funded without additional dues increases. A Reserve Study is required by Virginia law to be completed every five years, and is scheduled for late 2014, which will be used to update the target fully funded reserve levels.
- Spend down of Unrestricted Reserves (Surplus Cash Balance) – We recommend that the Unrestricted Reserves be spent down to fund capital improvement projects including, but not limited to, the completion of an arterial walking trail network throughout Glenmore.

We have not included any adjustment to dues or expenses related to any future ownership of the Club by the GCA. Even if the idea were to be pursued, it is not yet clear what effect it would have on annual dues. Further study of the purchase of the Glenmore Country Club by the GCA is called for elsewhere in this plan.

As a result of all the above, we anticipate increases in annual dues over the next five years as follows:

	2013	2014	2015	2016	2017	2018
	<u>Actual</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>
<i>Annual Assessment per Lot</i>	\$857	\$857	\$933	\$1,008	\$1,068	\$1,132
<i>% Increase</i>		0%	8.9%	8%	6%	6%
<i>Dues Eligible Lots</i>	778	789	810	832	853	872

Projected income and expenditures are shown in the table, below, together with explanatory notes:

Projected Income & Expenses	2013	2014	2015	2016	2017	2018	
	<u>Actual</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>	
Income:							
Regular Assessments (Net)	670,746	672,792	751,951	834,165	906,532	982,328	<i>Notes:</i>
Special Assessment		250,086					(1)
Interest Earned (Including Reserve Accounts)	1,339	1,300	1,100	1,100	1,100	1,100	
Glenmore Country Club's Share of Guard	51,669	54,600	58,947	60,126	61,328	62,555	
Other Revenue	7,662	6,000	6,000	6,000	6,000	6,000	
Total Revenue	731,416	984,778	817,998	901,390	974,961	1,051,983	
Expenses:							
Management and Administration:							
Professional Services	11,700	12,500	12,750	13,005	13,265	13,530	(2)
Insurance, Licenses, Taxes	22,722	11,700	11,934	12,173	12,416	12,664	
Communications	3,328	2,600	2,652	2,705	2,759	2,814	
Management Support Contracts	27,000	26,000	26,000	26,000	60,000	90,000	(3)
Supplies & Misc.	1,922	3,000	3,060	3,121	3,184	3,247	
Total Management and Administration	66,672	55,800	56,396	57,004	91,624	122,256	
Property Operation and Maintenance:							
Landscape Maintenance	110,341	141,500	145,745	150,117	154,621	159,259	
Water Management	43,548	81,000	55,000	56,100	57,222	58,366	(4)
Roads and Walking Paths	216,001	217,000	159,495	167,470	175,843	184,635	(5)
Sign and Mailbox Post Maintenance	4,682	7,500	7,650	7,803	7,959	8,118	
Equestrian Parcel Purchase Loan		20,060	60,181	60,181	60,181	60,181	(6)
Total Property Operation and Maintenance	374,572	467,060	428,071	441,671	455,826	470,561	
Safety and Controlled Access:							
Gatehouse & Vehicle	229,909	239,300	256,290	261,416	266,644	271,977	(7)
Crime Safety	17,250	30,000	30,600	31,212	31,836	32,473	
Total Safety and Controlled Access	247,159	269,300	286,890	292,628	298,481	304,450	
Equestrian Parcel Deposit:							
		380,000					
Contingency:	5,032	10,000	10,200	10,404	10,612	10,824	
Contribution to Reserve Account (Restricted Reserves)	37,981	(197,382)	36,441	99,683	118,418	143,892	(8)
Total Expenses	731,416	984,778	817,998	901,390	974,961	1,051,983	

Notes

(1) Special Assessment of \$321 per lot for Equestrian Center purchase

(2) 2% inflation is assumed for most categories

(3) Assumes professional management of some GCA functions starting in 2017

(4) Includes increases in 2014 & beyond for drainage infrastructure maintenance

(5) Assumes 30% reduction in annual road re-surfacing costs from 2015

(6) Loan payments for purchase of Equestrian Parcel from Sept 2014, break-even operational costs

(7) Additional 5% gatehouse labor cost from 2015 due to Affordable Care Act

(8) Contributions to ensure that projected reserves meet target levels

Projected Restricted Reserves (the Reserve Account) and Unrestricted Reserves (Surplus Cash Balance) are shown in the table below. During 2014 the Unrestricted Reserves have been used to partially fund the purchase of Glenmore Farm and hold 2014 dues at the prior year's level. Construction of the Darby Road Walking is projected in 2015. Dues increases beyond 2015 will allow Restricted Reserves to be maintained at fully funded target levels.

Reserve Accounts Projections

	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>Notes:</u>
	<u>Actual</u>	<u>Budget</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>	<u>Est</u>	
<u>Restricted Reserves (Reserve Account)</u>							
Beginning Year Balance	469,790	353,102	360,000	410,000	420,000	430,000	(1)
Construction Impact Fees Received	9,000	14,300	20,400	22,100	25,200	27,000	
Transfers to/(from) Operations		42,598	89,600	72,900	74,800	83,000	
Estimated Expenditures		(50,000)	(60,000)	(85,000)	(90,000)	(100,000)	(2)
Transfer to Unrestricted Reserves	(125,688)						(3)
End Year Balance - Restricted	353,102	360,000	410,000	420,000	430,000	440,000	
Estimated Fully Funded Reserve Target		360,000	410,000	420,000	430,000	440,000	(4)
% of Fully Funded Target		100%	100%	100%	100%	100%	(5)
<u>Unrestricted Reserves (Surplus Cash Balance)</u>							
Beginning Year Unrestricted Reserves	289,255	452,924	212,944	59,785	26,568	10,186	(1)
Transfers From/(To) Operations	37,981	(239,980)	(53,159)	26,783	43,618	60,892	(6)
Capital Projects			(100,000)	(60,000)	(60,000)	(60,000)	(7)
Transferred from Restricted Reserves	125,688						
End Year Balance - Unrestricted	452,924	212,944	59,785	26,568	10,186	11,078	

Notes

(1) Balances exclude Operating Account Cash reserve of \$125,000

(2) Estimated replacements/repairs

(3) \$125,688 was transferred to Unrestricted Reserves in 2013 since the Reserve Account was fully funded

(4) Estimates - New reserve study is scheduled for second half of 2014, which will re-assess targets

(5) A strong level of reserves is generally deemed to be over 80% of fully funded target

(6) Transfers to Operations. Includes \$150,000 towards Glenmore Farm purchase in 2014

(7) Estimated new capital expenditures. Assumes \$100,000 Darby Rd Footpath in 2015

VI. CONCLUSIONS

As the homeowners association for Glenmore, the GCA has four primary roles: (1) to maintain and improve common areas and roads, (2) to manage access to the community via the gatehouse, (3) to provide enforcement of the Covenants and Regulations that impact the community environment, and (4) to act as appropriate to protect the interests of the community as a whole and protect property values. The 2014-2018 Strategic Plan was developed to help the GCA better accomplish those four roles. To that end, we identified five strategic objectives. Those five are listed below with a summary of recommendations to the Board regarding each of them. This new strategic plan is not intended to prescribe actions to be undertaken by the GCA in the next five years. Rather it is a list of recommendations to be considered by the Board and its committees as they work to maintain and improve the quality of life in the community.

Strategic Objective A - Perform required functions effectively and efficiently.

Maintenance of Roads, Ponds, Storm Water, and Walking Paths and Trails

- Commission an updated master roads plan based on the consultant's report, and re-examine the frequency of road re-surfacing.
- Reduce destruction along roadsides with installation of white posts in construction traffic areas and repair roadsides promptly when damaged.
- Employ a qualified consultant to analyze the condition of the three ponds and carry out a bathymetric study to determine if safety ledges and siltation build-up need remediation.
- Install a fountain in Piper Pond; develop a regular program for fish restocking.
- Continue repairs of deficiencies in storm water infrastructure as needed and build those costs into GCA budget.
- Create an *ad hoc* committee on Walking Paths to plan for and encourage the use of additional walking paths and trails, especially in newly developed areas.
- Add more pet waste receptacles to walking paths.

Gatehouse, Safety and Security

- Plan for extensive maintenance and refurbishment of the ageing gatehouse.
- Evaluate the potential use of remote gatehouse management during the evening hours.
- Consider speed tables, humps, or other traffic calming alternatives to deter speeding.

Enforcement of Covenants and Regulations

- Communicate and educate Glenmore residents via the GCA newsletter regarding what kinds of C&R infractions are occurring and how these are being addressed.
- Work with realtors encouraging them to educate potential buyers about the C&Rs prior to purchase.

Architectural Approvals

- Engage with Glenmore Associates to encourage transfer to the GCA of 100% of the ARB responsibility.

Communication

- Continue to move toward email for distribution of all GCA communications.
- Appoint a Communications Committee to guide and develop GCA communications.

Administration: Records and Insurance

- Significantly increase the use of cloud storage for GCA records.
- Restrict physical storage only to those documents that must be maintained as such by law.
- Adjust insurance amounts to cover increased dues and reserve funds, as well as liabilities associated with the soccer field and basketball court if deeded to GCA.

Strategic Objective B - Ensure Sustainable Organization and Management Structure

- Transform the Board of Directors from an operational board to a policy board.
- Build a broader network for Board membership through recruitment of individuals new to serve on GCA committees.
- Create a new Social Committee that will coordinate with the Glenmore Country Club in organizing quarterly welcoming events for new Glenmore residents.
- By 2016, create an ad hoc committee to review current GCA staffing and management and make recommendations regarding the possible need of professional management for some or all GCA functions.

Strategic Objective C - Ensure Proper and Transparent Fiscal Management

- Evaluate and introduce more efficient methods of handling accounting tasks.
- Take advantage of automated bank account redistribution services for multiple bank accounts.

Strategic Objective D - Accommodate and Influence Future Developments**Glenmore Country Club**

- Continue to explore with the GCC ways to increase the percentage of Glenmore residents who enjoy some level of club membership.

Glenmore Equestrian Center

- Protect Glenmore property values by completing the planned GCA purchase of the roughly 61-acre property so that the rural nature of the property can be assured for the long term.

Rivanna Village and Entrance Corridor

- Ensure that the buffer zone is landscaped and maintained in such a way that will offer, to the extent possible, the wooded look currently in place.
- Work with the County Board of Supervisors and others to reverse VDOT's resistance to construction of a new entrance from Rt. 250 to handle construction traffic for Rivanna Village.

Carroll Creek Bridge

- Work with the County during 2014 and 2015 to ensure timely construction of the new bridge.

Soccer Field and RV Parking Lot

- Work with the Glenmore Associates to transfer management of the soccer field to GCA

- When that is finalized, seek a maintenance agreement with the owner of the RV lot concerning the access road adjacent to the soccer field.

Second Glenmore Entrance

- Make an application to the County in 2015-2016 to establish a second Glenmore entrance/exit via Running Deer Road.
- Investigate the nature and cost of an electronically operated gate at that site.

Ownership of Common Areas and Roads

- Work with Glenmore Associates to facilitate the handover of remaining common areas, residue parcels, and roads, including Sections S and Q2 and the area outside the gatehouse to the east of Glenmore Way.

Strategic Objective E - Improve the Appeal of Glenmore and Enhance its Property Values

- Work with developers to add more walking paths in new developments.
- Create a Beautification Committee to explore the addition of more attractive landscaping, especially along the lengthy divided portion of Piper Way.

Appendix A

REVIEW OF 2008-2012 STRATEGIC PLAN

In early 2008 the GCA issued the previous Strategic Plan covering the years 2008 to 2012. The Association has undertaken substantial changes since then, many of which were anticipated in the plan, but many were not. Listed below are the plan's key recommendations, together with an assessment of the extent to which they were subsequently adopted.

Property Operations & Management:

Recommendation	Result
Use CARB to manage routine maintenance	<u>Implemented</u> . CARB is now responsible for all maintenance other than roads.
Implement pond maintenance strategy	<u>Implemented</u> . Strategy in place and managed by CARB.
Implement trails recommendations	Partly implemented. Some little-used trails no longer maintained. Rivanna Trail was deeded to Albemarle County.
Implement ongoing road repaving/resealing plan	<u>Implemented</u> . Annual repaving & repair strategy being followed. Slurry seal abandoned due to unacceptable aesthetics.
Provide for repair or replacement of dams in the event of catastrophic storm	Not implemented. GCA Board determined better strategy was to deal with repair costs at the time of such an event.
Make CARB responsible for roads	Not implemented. GCA Board felt roads were important enough to warrant their own committee.
Make CARB chairman an appointed member of board	Not implemented. GCA Board felt all directors should continue to be elected where possible.

Management & Administration:

Recommendation	Result
Assume financial management and accounting responsibilities	<u>Implemented</u> . Developer no longer participates.
Phased takeover of ARB responsibilities	<u>Implemented</u> . GCA now authorizes modifications through its Architectural Review Committee, and has a voting seat on the ARB for new construction.
Establish virtual office with mailing address, telephone, email	<u>Implemented</u> . GCA Board subsequently chose to use email as primary communication instead of telephone and mail.
Hire Contract Property Manager and establish physical office	Not implemented. Alternative strategy successfully implemented using five volunteer staff members to perform ongoing duties. May be necessary at some future time.
Replace Bremerton Cottages position on GCA Board with at-large position	<u>Implemented</u> . Articles of Incorporation amended to make all elected board seats are at-large.

Employ recording secretary to take Board Meeting minutes	<u>Implemented.</u> Using volunteer staff member.
Take charge of own records	<u>Implemented.</u> GCA now maintains all records.
Introduce staggered two-year terms for GCA Directors	<u>Implemented.</u> Three Directors elected each year for two years.
Limit consecutive terms for Directors to 3 (6 years)	Not implemented, vetoed by developer.
Increase Dues to \$887 from 829 lots by 2012	<u>Implemented.</u> Dues held down to \$857 even though total lots in 2012 were only 761.

Safety & Security:

Recommendation	Result
Continue to employ off-duty officers	<u>Implemented.</u> Officers employed primarily at night, at random times and high-risk periods.
Develop a phased security plan with Securitas	Not implemented. No significant opportunity identified.
Develop traffic engineering plans to calm traffic	Not implemented. Strong reaction by residents against speed humps, tables, roundabouts, and speed traps.
Direct construction traffic away from Darby Road	<u>Implemented.</u> Signs erected, and gatehouse advising contractors to avoid this route.
Replace gatehouse hardware & software	<u>Implemented.</u> New computers and software introduced.

Communication:

Recommendation	Result
Encourage residents to use email	<u>Implemented.</u> 80% of members now receive information by email. Hard copy newsletter has been abandoned.

Growth & Development

Recommendation	Result
Determine whether to install additional access points to Glenmore	Not implemented. Proposal for Running Deer Road blocked by Albemarle County Planning Commission.
Ameliorate costs due to construction traffic	<u>Implemented.</u> Construction Impact Fees introduced for new home construction in Livengood and Leake areas to offset road damage.
Minimize impact of Rivanna Village on Glenmore	<u>Implemented.</u> GCA Board has worked with developer of the Village to provide increased buffer and screening along Glenmore Way. Ongoing.
Participate in Master Planning process	<u>Implemented.</u> Glenmore residents now participate in and chair the Village of Rivanna Master Plan Advisory Committee.

The following additional changes to the GCA have been undertaken during the last five years, but these were not specifically addressed or anticipated in the previous Strategic Plan:

- Ownership of most roads and common areas has been transferred to the GCA.
- Maintenance agreements have been reached with the Scottish Homes and Bremerton Cottages Associations.
- Enforcement of Covenants has been transferred from the developer to the GCA.
- A Security Liaison Committee has been formed to provide better coordination with the police.
- The Country Club's contribution to the GCA has been reduced, offset by a right of first purchase of the club, free use of meeting room facilities, and storage of GCA records.
- License Plate Recognition has been installed at the gatehouse
- The Rivanna Trail has been deeded to the county, which now maintains it.

Appendix B

Results of the Glenmore Community Survey - 2013

In late October 2013, the Strategic Planning Committee emailed the Glenmore Community Survey to 652 Glenmore households. A remarkably high number of residents responded; resulting in a 75% response rate.

The results of the survey, by item, are presented below.

I. Property Ownership

Do you own property in Glenmore?

99% of the respondents own property in Glenmore.

a. How many properties (lots) do you own in Glenmore?

- 96% of the respondents own **one property**.
- <4% own 2 properties.
- <1% own 3 or 4 properties.

b. Year first property purchased?

- The typical property owner has owned their property for nearly ten years (9.8 years).
- Half of the respondents purchased their property after 2007.
- The greatest number of properties, 40, was purchased in 2006.

II. Residency Information

Do you reside in Glenmore?

95% of the respondents reside in Glenmore. The remaining 5% live elsewhere.

a. In what year did you move to Glenmore?

Answers to this question were recoded to calculate the number of years that respondents have lived in Glenmore.

- The average length of residence is 9.3 years.
- Half of Glenmore residents have lived here 8 years or less;
- The largest number of residents (32) moved to Glenmore less than a year ago. *This is the highest number of new residents since 2005 and 2006 (31 families move to Glenmore in each of those years)*

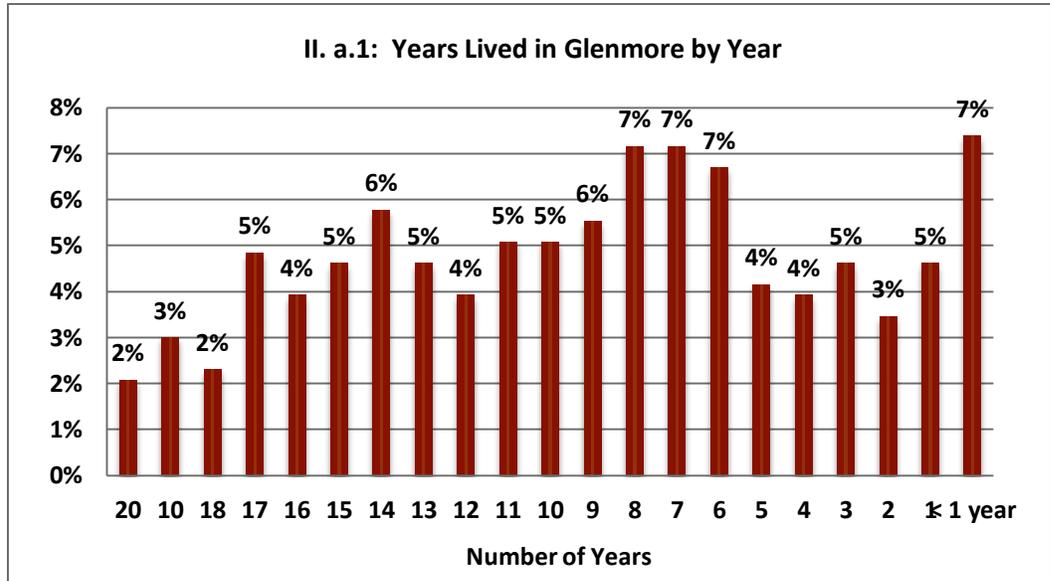
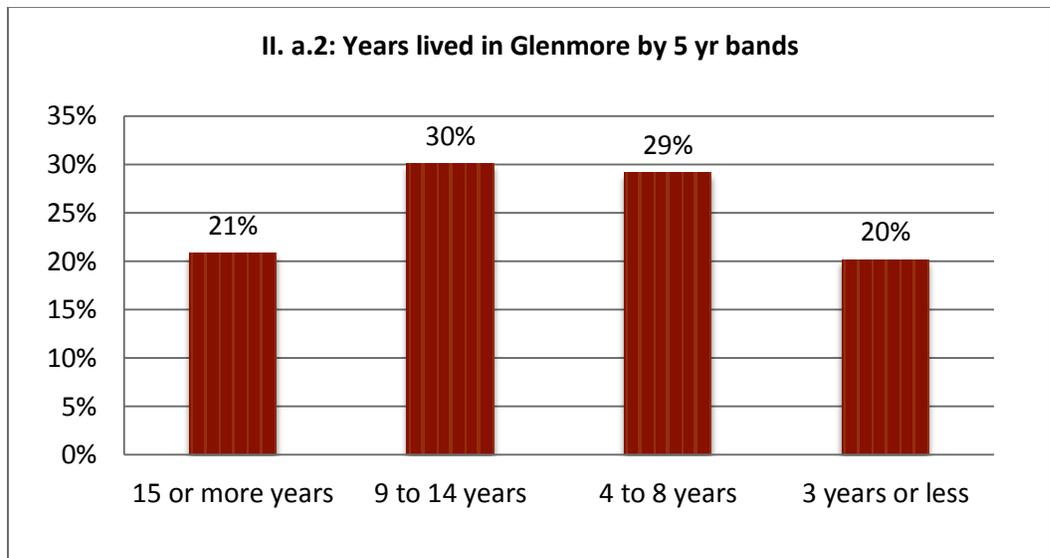


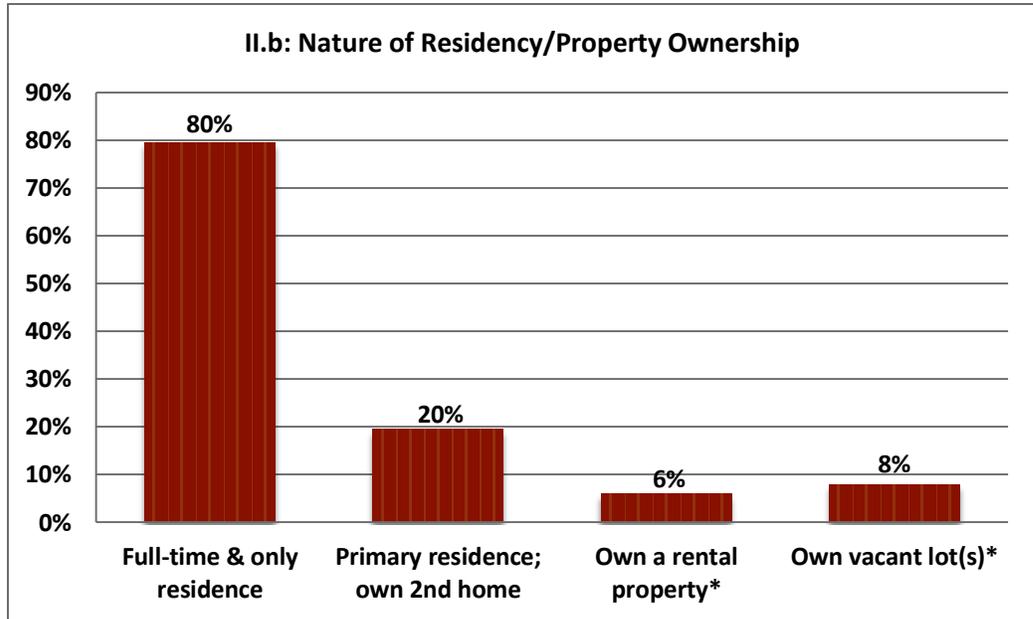
Table II.a.2 reveals that 20% of all Glenmore moved in three or few years ago.



b. Describe the nature of your residency and/or property ownership.

Eighty percent of respondents indicate that their Glenmore home is their full-time and only residence; 20% indicate that Glenmore is their primary residence **and** they own a second home elsewhere. Six percent of Glenmore residences are rental properties. Eight percent of property owners own one or more vacant lots¹. (Note: Total is greater than 100% as respondents could check more than one option.)

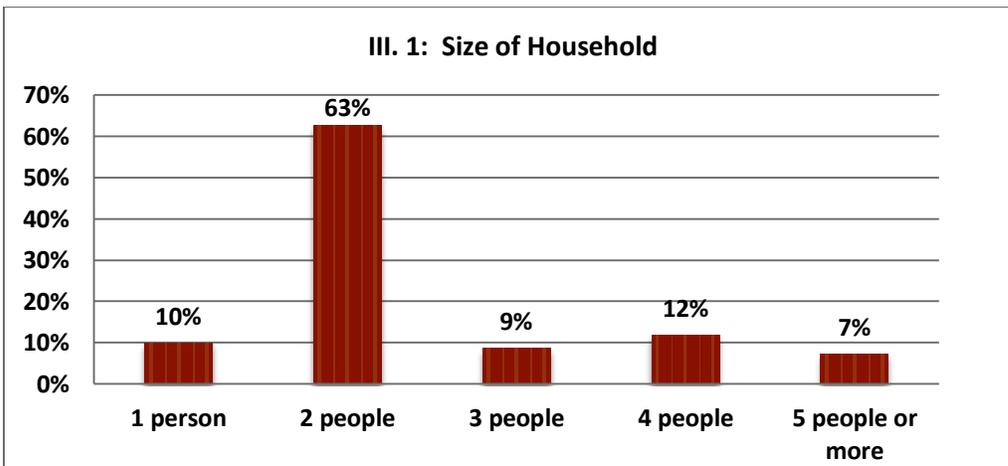
¹ Actual percent based on GCA records.



III. Household Demographics

- 1. Please indicate the number of permanent residents in your household. Include any students who attend school or college elsewhere.**

The large majority (73%) of Glenmore households are occupied by one (10%) or two persons (63%). Slightly more than a quarter of Glenmore households have three or more members.

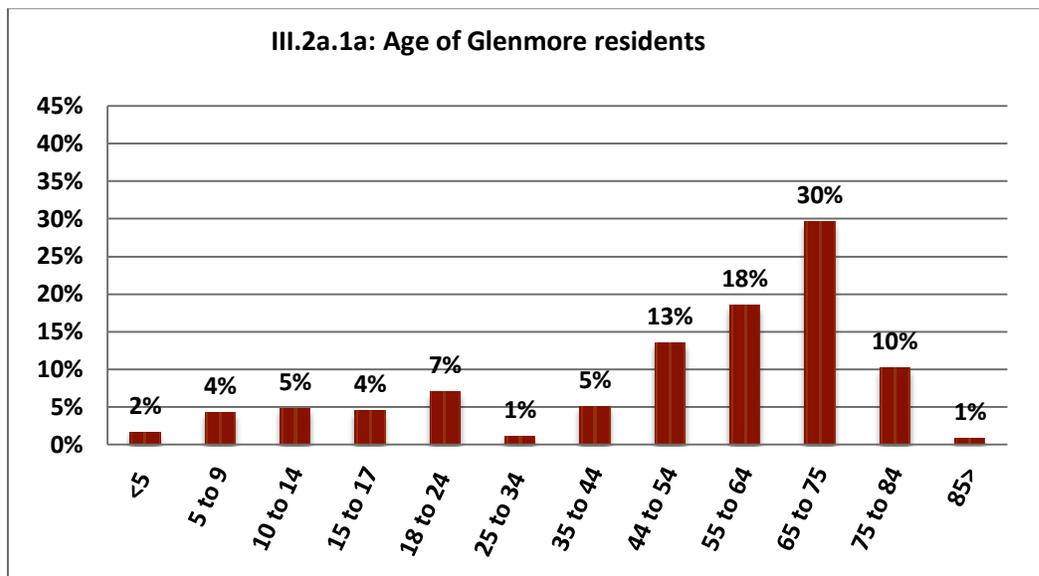


- 2. Please provide the following information for each person living in your household: their age, sex, relationship to Person 1, educational attainment, employment, occupation and operation of a business from home.**

a. Age

NOTE: Formatting considerations precluded collecting the specific age of each household member, however, charts III.2a.1a and III.2a.2a clearly show the age distribution of Glenmore residents.

- **22% are under 24**
- **38% are between 25 and 64.**
- **41% are over 65**

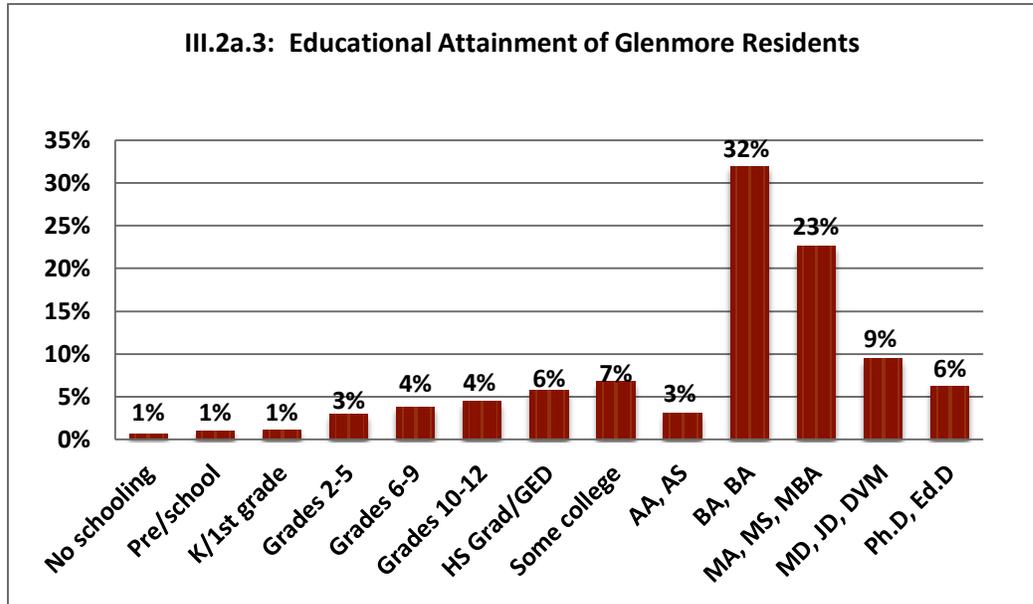


b. Gender

Fifty-three percent of Glenmore residents are female; 47% are male. This percentage of females is larger than the national percentage of 51%.

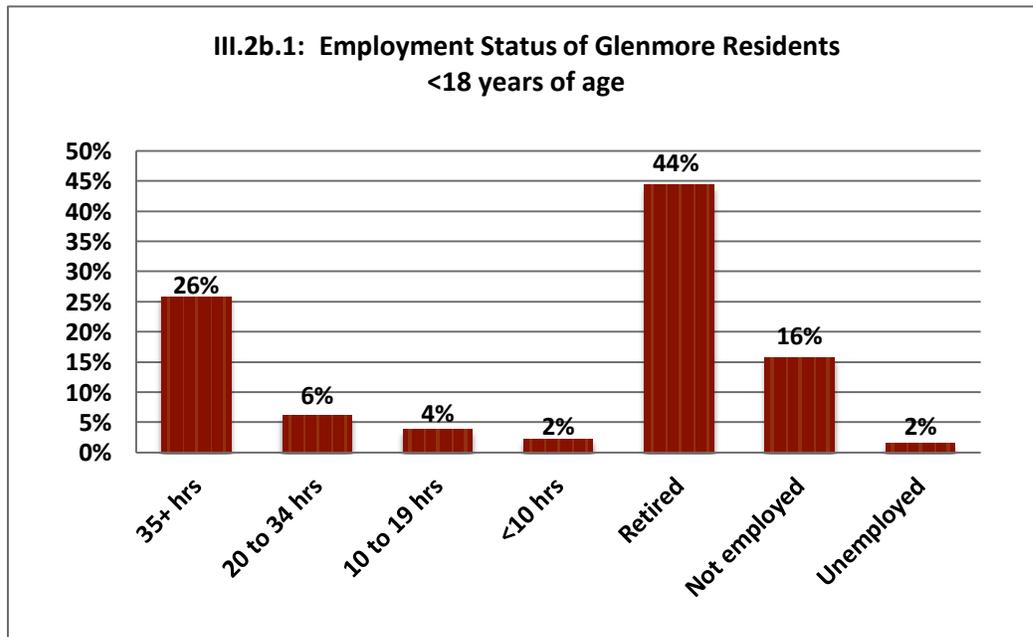
c. Education

Glenmore residents are highly educated, 70% have earned a bachelor's degree or higher. Fifteen percent have a doctoral degree.



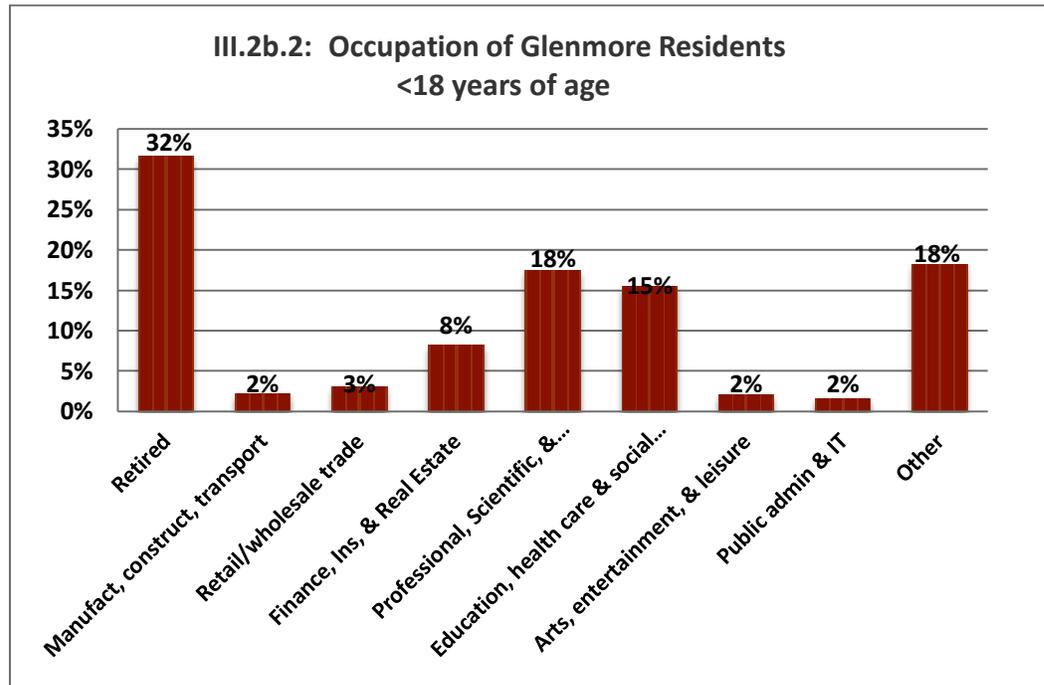
d. Employment

Nearly 60% of Glenmore residents over the age of 18 are retired or not employed; only 26% are employed full-time.



e. Occupation

One-third of Glenmore residents over 18 are engaged in either 'professional, scientific and management' or 'education, health care or social assistance' occupations. Another third list their occupation as retired and 18% indicate their occupation is in some other field than the named categories.



f. Home business

Thirteen percent of Glenmore residents operate a business from home. Of these, seven percent work from home more than 20 hours per week.

IV. Glenmore and its amenities

1. **What appeals to you most about Glenmore? Rank order the TOP FIVE things you find most appealing.**²

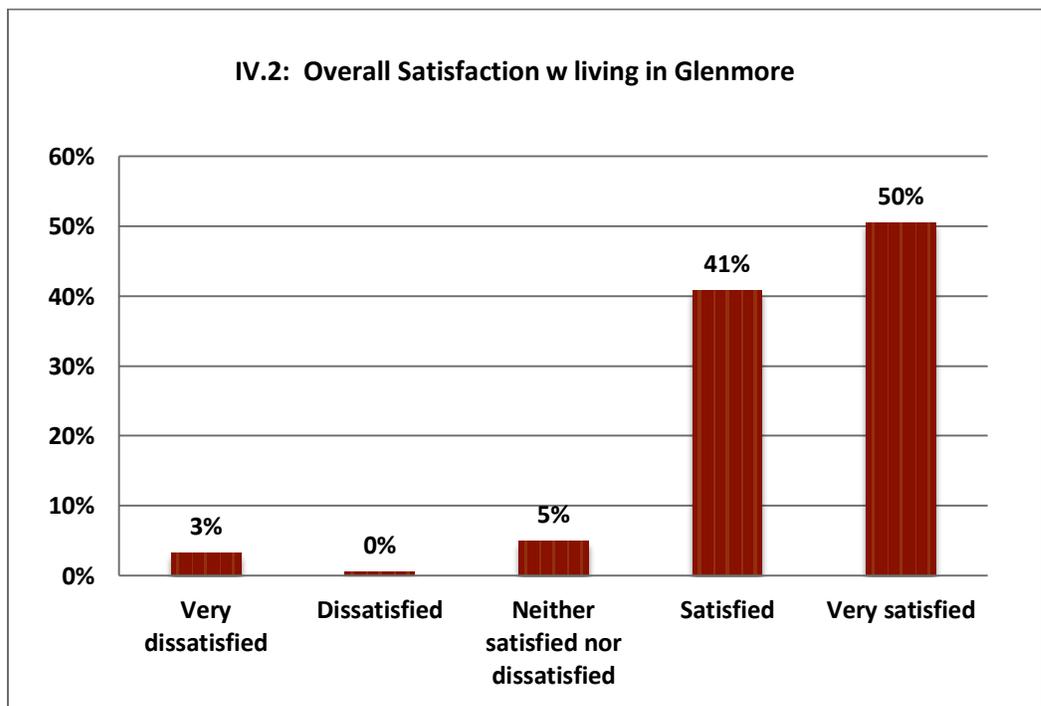
Respondents were asked to rank ordered 13 features of the Glenmore community. 'Attractive homes and setting', 'private, gated community', 'golf, tennis, swimming and other GCC activities', 'strong sense of community', and 'family-friendly' received the top-five ratings.

² The rating scale has been reversed for ease of interpretation.

Attractive homes and setting	2.87
Private, gated community	2.39
Golf, tennis, swimming and other GCC activities	2.37
Strong sense of community	1.83
Family-friendly	1.79
Good investment property	1.75
Proximity to Charlottesville	1.65
Walking paths and trails	1.60
Horse stable and training facility	1.52
The road and entrance to Glenmore	1.49
Yard maintenance provided (Bremerton Cottages/Scottish Homes only)	1.30
Retiree-friendly	1.15
Enforcement of the covenants and restrictions.	1.10

2. Rate your **OVERALL SATISFACTION** with living in Glenmore.

Ninety-one percent of respondents indicated they are **satisfied** or **very satisfied** with living in Glenmore. A full 50% are **very satisfied**.



Further analysis of this question reveal that a greater proportion of 'residents over 65'; 'retired residents' and 'members of Glenmore Country Club' are **very satisfied** with living at Glenmore.

“ Very satisfied” with living at Glenmore

<i>65+</i>	<i>25-64</i>
61%	41%

<i>Retired</i>	<i>Working <20 hours/week</i>
58%	38%

<i>GCC Member</i>	<i>Non GCC Member</i>
56%	39%

a. What two things contribute most to your SATISFACTION as a resident of Glenmore?

Analysis of the 665 responses to this question, reveal that Glenmore Country Club and its amenities, the beauty of the community, the sense of community, and one’s own home contribute most resident satisfaction with Glenmore.

a. What two things (if any) contribute most to your DISSATISFACTION as a resident of Glenmore?

This question yielded far fewer responses (430) and these responses were far more varied and less clustered. A variety of comments about the operation and value of the Glenmore Country Club; dogs (barking and poop); traffic: internal – excessive speed; external – congestion on Rt. 250; and deer were cited most frequently.

- 3. Glenmore Community Association (GCA) works on behalf of the Glenmore property owners to maintain common areas and facilities, and enforce regulations so as to maintain and improve the character of the community and enhance property values.** For each of the following, indicate the degree to which you are satisfied with the following GCA functions/operations:

Satisfaction with GCA operations and functions is very high. Items are arranged by 'very satisfied' from high to low and range from 83% to 23%.

	Very dissatisfied	Dis-satisfied	Neither dis-satisfied or satisfied	Satisfied	Very satisfied	Very satisfied/satisfied
The electronic recognition system (gate) for residents.	1%	0%	1%	15%	83%	98%
Gatehouse procedures and practices for admitting guests.	1%	1%	3%	34%	59%	94%
Frequency of communications with the Glenmore community.	0%	1%	7%	50%	41%	91%
Usefulness of communications to the Glenmore community.	0%	2%	10%	46%	42%	88%
Maintenance of common areas: roads, medians, ponds, and green spaces.	1%	4%	7%	49%	39%	88%
Gatehouse procedures and practices for admitting contractors and other workers.	1%	4%	9%	41%	45%	86%
Management of Glenmore's fiscal/ financial affairs by the Board of Directors.	0%	2%	16%	45%	37%	82%
Responsiveness of GCA Board/ Committee Chairs to your concerns.	0%	4%	32%	40%	24%	64%
Enforcement of property covenants and restrictions.	1%	8%	23%	45%	23%	68%
Patrols for security to minimize theft and vandalism.	1%	5%	28%	42%	23%	65%

- 4. Following is a list of actions that the GCA could take to enhance the quality of life in Glenmore. Recognizing that pursuit of any of these would likely require an increase in annual dues, indicate the degree to which you support each action.**

Two-thirds of respondents express moderate or strong support for 'increased efforts to reduce the deer population'. Nearly 50% of residents support 'more social events that would enhance the sense of community'. Forty-five percent support 'additional walking paths', 42 percent favor 'additional landscaping and flowerbeds' and 36 percent support 'acquisition of additional property for green space and additional walking trails'.

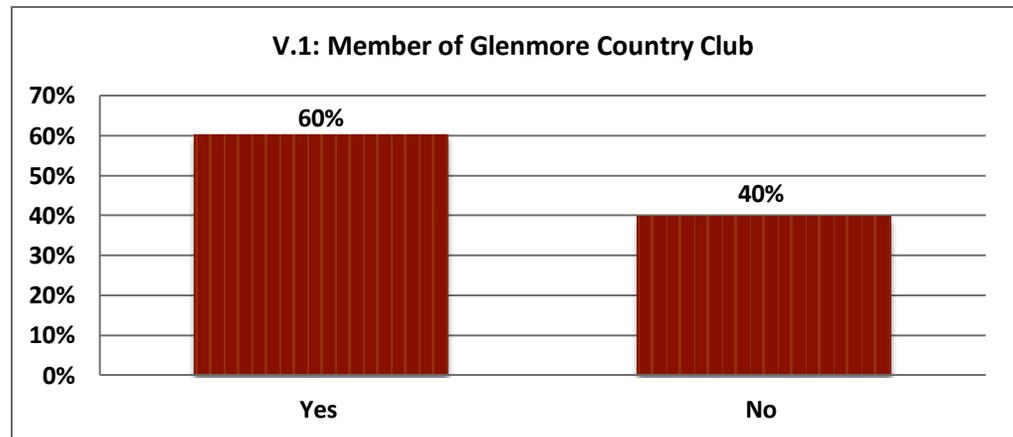
	Would not support	Slight support	Moderate support	Strong support	Strong/moderate support
Increase efforts to reduce the deer population	17%	17%	19%	48%	66%
Add more social events throughout the year that enhance the sense of community in Glenmore	20%	30%	32%	17%	49%
Add additional walking paths	30%	25%	26%	18%	45%
Add more attractive landscaping and flowerbeds along roadways and medians	27%	31%	26%	16%	42%
Acquire additional properties within Glenmore that can be used as green spaces for the enjoyment and activities of all residents	36%	28%	22%	14%	36%
Add additional walking trails	34%	30%	19%	17%	36%
Improve the quality of the common area ponds and stock them for catch-and-release fishing	39%	29%	19%	13%	32%
Add a children's play area	40%	28%	21%	10%	31%
Once the soccer field is deeded to the GCA, make improvements on the field including adding a small section of bleachers	35%	35%	22%	8%	30%
Add a dog park	51%	21%	15%	12%	28%
Add a picnic pavilion and outdoor social area	47%	27%	18%	8%	26%
Add street lights	65%	14%	10%	10%	20%
Hire a professional management company to manage Glenmore	53%	30%	12%	5%	17%

V. Glenmore Country Club

1. Are you a member of the Glenmore Country Club?

As of November 2013, 60% of households are members of GCC; 40% are not.³

³ Data provided by GCC.



[If yes] Check the type of membership you hold.

Similarly, the actual number of membership by type was provided by the GCC. Nearly 42% are golf members; 19.5 are sports members, 13.2% are fitness members and just over 25% are social members.

Family Golf	155	34.8%	41.7%
Individual Golf	15	3.4%	
Family Jr. Golf	4	0.9%	
Family Sr. Golf	10	2.2%	
Individual Sr. Golf	2	0.4%	
Family Sports (Tennis)	53	11.9%	19.5%
Individual Sports (Tennis)	6	1.3%	
Family Jr. Sports (Tennis)	1	0.2%	
Family Sr. Sports (Tennis)	25	5.6%	
Individual Sr. Sports (Tennis)	2	0.4%	
Family Fitness	38	8.5%	13.2%
Individual Fitness	8	1.8%	
Family Sr. Fitness	5	1.1%	
Individual Sr. Fitness	8	1.8%	
Family Social	70	15.7%	25.6%
Individual Social	8	1.8%	
Family Jr. Social	3	0.7%	
Family Sr. Social	22	4.9%	
Individual Sr. Social	11	2.5%	
	446	100.0%	

[If no] Which of the following reasons have prevented your joining the Glenmore Country Club? (Check all that apply.)⁴

The vast majority of respondents who are not members of GCC (85.6%) indicated the cost of membership is too high. Thirty one percent are not interested in or feel that the Club's

⁴ Total greater than 100% because respondents check as many as apply.

activities do not meet their needs. Another 31% belong to another club and prefer that membership. Dissatisfaction with the Club management, service and food were most frequently cited as 'other reasons'.

Cost of membership is too high (<i>includes comments on high initiation fee & desire for a la cart pricing</i>)	86%
Not interested in Club's activities or amenities (<i>includes comments on lack offerings for families/working people, need for year round swimming</i>)	31%
Member of another club & prefer that membership	31%
Do not have time to take advantage of the Club's amenities.	14%
Other ⁵	13%
Do not live at Glenmore full-time.	1%

*(For non-GCC members) If some of the Glenmore Country Club's sports or social facilities could be incorporated into the Glenmore Community Association and funded by an increase in the annual GCA dues, but at a more affordable rate than current Club fees, what activities might you be interested in including?*⁶

Non-GCC members were most interested in dining, fitness and access to occasional golf.

Dining	12.4
Fitness center	10.1
Occasional golf	8.1
Swimming	7.4
Social Activities	7.0
Tennis	2.4

⁵ Many of the 'other' reasons were elaborations on the five reasons of the original question; therefore they are recoded and included in the counts of the survey reasons.

⁶ Scale is reversed purpose of clarity.