

Community Input Process

DVRC Strategic Plan

02/11/20

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This report provides the results of the comment period for the DVRC Strategic Plan. The comment period began September 7, 2019 and concluded January 15, 2020.

Strategic
Planning
Committee

*Dreamland Villa*⁵⁵⁺
RETIREMENT COMMUNITY

ACKNOWLEDGEMENTS

Members of the Strategic Planning Committee would like to thank the people who contributed their time to facilitate the community input process for the Strategic Plan. During this process a series of meetings were held, input was collected and surveys were conducted. This report is the result of the hard work of those who provided their help and assistance with this process. This includes the numerous volunteers who so graciously gave of their time as door greeters and helped out with preparation and serving of refreshments at the meetings, the DVRC office staff and volunteers who printed copies and put packets together and members of the Board of Directors who provided guidance, volunteered their time and reviewed materials. Your efforts made this process happen and we are forever grateful.

ABSTRACT

Strategic planning involves the practice of looking forward from the immediate future through the development of strategies to reach a particular set of goals. Without this foundation an organization is more likely to be reactive rather than proactive in its approach to decision-making and problem solving. In March, 2019 the Dreamland Villa Retirement Community (DVRC) embarked on a strategic plan (Plan) to develop practical and workable strategies to help guide the organization in the years to come.

The comment period for the Plan occurred between September 7, 2019 and January 15, 2020, at which time various methods were used to gather data and input from residents. These methods included surveys, community meetings and small group sessions. This approach provided a mechanism for open communications and dialogue among interested parties and aided the collaborative process. This report contains the results of the input received from residents during the comment period. In addition to gathering input and data, the dissemination of information is equally important to strategic planning. Various methods of communication have been used throughout this process to inform and update residents about the Plan, the status of DVRC and about the community.

The methodology used in this study is primarily qualitative in nature. Qualitative data was deemed necessary at this time to help assess the needs and desires of residents concerning DVRC services. Conducting a large-scale representative sample of residents within the given timeframe of this project was not possible. Data collection techniques needed to be accomplished in a timely and cost-effective manner. Statistical analysis was not suitable for the type and limited amount of data that was collected during this process. Additionally, certain inferences and observations have been made to help guide the reader throughout this report. It must be noted that the information contained herein represents a small portion of the community and is non-representative of the total population. Future surveys could provide further iterative data and information that better reflects the community as a whole.

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INTRODUCTION

The Dreamland Villa Retirement Community (DVRC) is in the process of developing a strategic plan (Plan) to assist the Board of Directors with the development of strategies for policy and decision-making purposes. The planning process began in late March, 2019. Residents were initially informed about the Plan through the *Citizen* Newspaper and from flyers placed at DVRC facilities. An informational page about the Plan was also placed on the DVRC website to keep residents updated. A process to gather input began in the fall of 2019. Various methods were utilized to obtain input from stakeholders. Stakeholders include board members, employees, volunteers and community residents.

This report includes the results of the input received during the comment period that began on September 7, 2019 and ended January 15, 2020. During that time a series of four (4) community meetings, called coffee talks, were held. These meetings were advertised in the *Citizen* newspaper, on the DVRC website and with flyers placed at DVRC facilities. In addition to the coffee talks, other means of obtaining input from the community were also utilized, including a dedicated email address (strategicplanning@dreamlandvilla.org). A presentation and survey were also provided to members at the Annual Meeting on January 11, 2020.

The coffee talk meetings were held in Read Hall on September 7, 2019, October 19, 2019, November 16, 2019 and January 15, 2020. During the coffee talk sessions residents were provided with updated information by DVRC President, Johna Sharp, about the history and status of the community. All attendees were provided with a booklet of information about DVRC. These meetings were open to all residents of Dreamland Villa. Attendees were provided the same information at each session, as well as a survey and an evaluation form to complete.

Each coffee talk session was conducted in a relaxed and welcoming atmosphere with refreshments to help foster communication and interaction between attendees. After the initial introductory remarks and brief presentations at the beginning of each meeting, attendees were divided into smaller focus-style groups. The small groups allowed attendees to share ideas, ask questions, provide comments and discuss their concerns in a relaxed, non-threatening environment. Comments were written on flip-charts by monitors who were stationed at each group.

The information obtained during the comment period will contribute to the formation of strategies in the Plan and will assist the Board of Directors and staff with relevant tools for planning and decision-making. Conducting surveys and collecting information are important aspects of the process in order to assess the needs of the community. Surveys are helpful because they can encourage residents to consider what their lives will be like and what they may need or

want in the years ahead. By gaining a better perspective of residents' expectations in providing "age-friendly" or "livable" community services, the organization can plan accordingly. Gaining a better understanding of the needs and desires of residents is fundamental to DVRC's future success. A continuous and collaborative process between DVRC and residents is essential for this to occur. Data collected directly from residents allows the organizational mission to be more appropriately applied when implementing goals. Such information is valuable for identifying patterns and areas where DVRC may need to allocate resources or focus its efforts. Conducting surveys also keep residents apprised of DVRC's financial and operational constraints and other facets of the organization.

The data, information and comments received from the surveys are included in this report. A total of 79 surveys and 79 evaluations were completed and returned at the coffee talks. A total of 148 surveys were completed and returned at the Annual Meeting. Where appropriate, comments from the surveys are contained within the body of this report. The full results of the surveys are located in the appendices, along with the evaluations, flipchart comments and written submittals. The survey forms used are also included as reference.

The mission of the DVRC is: "To offer events, activities and facilities for the enjoyment of our residents and to maintain Dreamland Villa's status as a 55+ age-restricted retirement community." To meet its mission, DVRC collects annual dues from residents who want to join the organization. Members provide the majority of financial support to DVRC for activities, events, facilities and administration, including the 55+ overlay designation. Due to the choice given to residents of paying dues or not, the community is essentially divided into two "camps": members and non-members. This state of affairs directly impacts the mission of DVRC.

Dues-paying members are essential to the financial success of DVRC. The more residents that support the organization, the better DVRC can serve the community. The coffee talk meetings were open to all residents in the hope that non-members would attend. Maintaining the lines of communication with non-members is crucial to developing a more accurate depiction of the community. According to the coffee talk survey results, a total of four non-members attended the coffee talks (of those who submitted surveys). Although this is a start, additional input from non-members is needed. Future community meetings open to all residents may help facilitate DVRC communication with non-members.

For simplicity and ease of clarity, the results of the community input process have been divided into the following five categories in this report:

- Demographic Data
- Memberships and Membership Dues
- Board and Board Functions
- Communications and Technology Usage
- Activities and Programs

These categories represent the major elements and important processes of the DVRC mission and operational duties. Over time, changes occur in the population of a community. In order to remain relevant a membership organization, such as DVRC, must adapt accordingly. By focusing on critical areas necessary to accomplish the organizational mission, appropriate adjustments can be made. Sometimes the mission must change; sometimes the organization must change.

DEMOGRAPHIC DATA

A limited number of demographic questions were included on the surveys. Demographic data about the community is insufficient for quantitative analysis. As more data is collected over time, trends can be developed that better reflect the community. This is especially true in age-restricted communities, such as Dreamland Villa, where there is a select population that is differentiated from other communities.

Trends are important to measure, especially since age-restricted communities tend to change over time as a result of economic, cultural and other circumstances, such as aging out. The survey questions pertaining primarily to demographic data were the following:

- Are you a member of DVRC? (coffee talk survey)
- Are you working or retired? (annual meeting survey)
- How many years have you lived in Dreamland Villa? (annual meeting)
- What is your age group? (annual meeting survey)

The answers and comments received are provided below:

Q: Are you a member of DVRC? If so, why and if not, why not? (Coffee talk survey)

Yes	No
72	4

Comments:

- Since in a 55 club community, want it to continue
- No, I don't pay because I rent
- Yes, because we value the 55+ status and social contacts
- Yes, since 2000
- No, cost, I don't live here but when I have a renter, we will/may join
- Yes, support my community
- Yes because it's a 55 retirement community
- It is important to support the organization to help maintain the advantages of the 55+ overlay

- Because Dreamland is a nice place to live, low taxes, security, low fees, everything you would need close by
- I love living here – I wish more cooperation was available and people would realize the importance of being a member
- Yes, for 25 years
- Yes, for 20 + years
- Have been members for 22 years
- To be involved where we live
- Play cards, swimming pool, like living in a 55+ community
- We understand the importance of the 55+ overlay. Plus, enjoy the activities We understand the importance of the 55+ overlay. Plus, enjoy the activities.
- Yes, love the dreamland and want to support the community.
- Yes, I want to support 55 overlay and am involved in activities.
- Not a member – I didn't realize the need to join because I don't use the buildings.
- 55+ community and enjoy the amenities of the community.
- Because of the ___? of the house? and the friendly people
- To keep the 55+ designation
- I'm very interested in keeping Dreamland Villa a 55+ community
- Yes, my wife and I want to support the organization.
- Yes, to support the community
- If you live in DVRC, you need to be a member
- I feel 55+ is worth protecting to keep it a nice place to live.
- I wanted to be able to do all things associated with DVRC.
- We enjoy all the facilities we have in dreamland
- We became members because we appreciate the community's 55+ status and wanted to help protect that. The pool access is a +.
- It's important to contribute to the well-being of the community.
- I have met more people.
- The facilities and support DVRC
- Use of facilities and support DVRC
- Support DVRC – care about community, pool, events
- We felt we needed to support the community
- Because of low cost and potential to use facilities
- Want to maintain the 55+ or older community, enjoy the fellowship and activities
- I like the services provided. 55+ overlay, singles club, pools
- Pool room, swim pool
- 55+, No HOA, pool, activities, exercise equip
- Great area – love my home and being in a 55+ neighborhood
- Do not want to lose the 55+ status, interested in the arts & crafts, pool, social
- To maintain the community in its current 55+ designation
- To support the community
- Membership is most important!
- Enjoy serving and activities
- Enjoy the activities, security

Q: Are you retired or still working? (Annual meeting survey)

Status	# of Responses
Retired	135
Working	10

Q: What is your age group? (Annual meeting survey)

Age Group	# of Responses
55 - 65	16
66 - 76	72
77 - up	55

Q: How long have you been a resident of Dreamland Villa? (Annual meeting survey)

# of Years	# of Responses
5 years or less	46
6 – 15 years	76
16 – 25years	12
26 years +	10

The current population will likely require different services in the future. Additional demographic data could be helpful with developing a larger database useful to DVRC for assessing programs, activities and other resident needs. This is especially true as baby boomers (between ages 55 and 73 in 2019) continue to retire. According to the U.S. Census, the number of Americans ages 65 and older is projected to nearly double from 52 million in 2018 to 95 million by 2060, and the 65-and-older age group’s share of the total population will rise from 16 percent to 23 percent.^[1]¹

MEMBERSHIPS AND MEMBERSHIP DUES

Attendees at the community meetings were queried about DVRC membership and membership dues on the surveys. Since memberships provide the primary source of funding to DVRC it was important to inquire about resident status, dues and other matters related to this topic. This subject also tends to be a sensitive and controversial issue within the community. Gaining a better understanding of the reasons why some residents pay the fee and others do not would be beneficial information. It is predictable that a certain percentage of residents will not pay dues if they are not required to. However, the same expenses are still incurred by DVRC, whether dues are paid or not. To better understand the issues surrounding membership and membership dues, several questions were asked on the surveys. Below are the questions and results:

¹ Population Reference Bureau, 1875 Connecticut Avenue, NW Suite 520, Washington, DC 20009. Reference: U.S. Census Bureau, Population Projections.

Q: DVRC is considering increasing the membership dues in 2021 from the current \$175.00. The Increase would be based primarily on projected overhead costs for the next 5 years, considering inflation rate of 2%. This could result in either a \$35 increase or a \$50 increase over the current amount.

\$175 + \$35 = \$210 annually (\$17.50/month)

\$175 + \$50 = \$225 annually (\$18.75/month)

Would you support an increase in the membership due up to \$225 annually to help keep up with inflation and cover projected overhead costs for administration and facility upkeep? (Annual meeting survey)

Support an Increase	# of Responses
Yes	89
No	54

Comments:

- Yes, if you fund the posse, whom I donate to and I think we should have an HOA
- \$225 is a small figure for what we receive
- Yes, only if the posse receives some of the funding
- Do it gradually, not right to \$225, then I agree to increase
- No, we are here only 4 months
- No, can barely afford now
- If you can't get people to pay \$175 now – WHY would raising fee be option – you will drive more people away from paying, period. Lower it if anything to attract more people
- Only raise to \$210
- Yes, absolutely!
- Yes, if need be
- Yes, only if monthly payments are allowed
- Yes, definitely!

There are differences of opinion among members about increasing the dues. The previous increase occurred in 2015 when dues were raised from \$125 to \$175 per year. Some members believe that an increase is needed. Others believe that increasing the dues is unnecessary and would cause people to discontinue their memberships, or lead to further discord in the community. In addition, there is the viewpoint that more emphasis needs to be placed on growing the member base rather than increasing the dues. Each of these perspectives has merit. Differences on how best to address this matter continues to plague the community and cause rifts between members.

DVRC provides facilities, events, activities and programs for its members. In order to accomplish this, and fulfill its mission, DVRC maintains a limited staff and utilizes volunteers to fill necessary positions. Because DVRC funding is unpredictable from year to year, there could come a time in the future that DVRC is unable to sustain the quality of services it now provides. If this were to occur, the available options must be acknowledged and understood by members. In order to glean some idea of how residents might feel about this “*what if*” situation, the following question was put forth on the coffee talk survey:

Q: If DVRC is unable to remain financially solvent due to insufficient income, what do you suggest the members instruct the Board to do? (Coffee Talk survey)

Sell Assets	Increase annual fees	Relinquish the 55+ Status
15	42	3

Comments:

- Farnsworth most likely (to sell?) in 2021
- Relinquish 55+ is the worst mistake you could make
- The last dues increase decreased membership by 15%
- Not pool facilities – would lower value of homes. Increasing fees is very temporary solution. NO relinquish 55+
- Try harder to get more members
- Not sure. That’s the question at hand
- Relinquish the non-profit status

This question was an attempt to assess members’ understanding of the dilemma between the importance of funding and its connection to the 55+ designation. It is known (but has not been quantified) that a certain number of residents are either unaware or uninformed about the connection between paying dues and maintaining the 55+ overlay. Many residents claim that there is no reason for them to pay dues because they don’t use DVRC facilities. However, this is a misnomer since the dues are used to maintain the facilities and administer the 55+ overlay. Therefore, there is a direct connection. Whether or not a resident uses the facilities and chooses not to pay is irrelevant because they are in essence getting the benefit, but not paying the cost. Others simply don’t care about the 55+ designation, but choose to live in the community anyway.

Various options could be available to increase membership. The proponents of increasing the membership base instead of increasing dues believe DVRC should focus its efforts on retaining and recruiting members. This is certainly a worthy strategy that deserves further discussion and consideration. The strategic plan will need to include this idea, among other strategies to help address this issue. The potential difficulty with implementation of this practice is the substantial time commitment and reliance on volunteers to fully implement. If such a program were to be initiated, it is questionable as to whether or not it could be sustained year after year. To be successful, it most likely would need to be combined with additional approaches.

By providing different options for paying annual dues, such as a monthly option or auto-pay, it is believed that more residents will be encouraged to become members and current members will more likely continue their memberships. The rationale is that the simpler and easier it is to pay the fee, the more likely it is that residents will want to take advantage of these options. The DVRC office is currently working on implementing various payment methods. A quarterly payment option is already available, as well as online and credit card payments. To get a better sense of this situation, the following questions were asked on the survey:

Q: Currently, membership dues can be paid either quarterly or annually. In your opinion, should a monthly option also be made available? (Annual meeting survey)

Use Monthly Option	# of Responses
Yes	86
No	56

Q: Would you use an Auto-pay option for paying your membership dues if it is made available? (Auto-pay allow you to have your dues automatically deducted directly from a checking/savings account or credit card on a specific due date). (Annual meeting survey)

Auto-Pay	# of Responses
In favor	73
Opposed	68

It appears from the answers given by respondents that there is some support for offering payment options. Additional data on the use of these options is needed to draw any further conclusions.

Several comments on the surveys indicated that some members have a difficult time paying the annual fee at \$175 per year. An increase could potentially create more of a burden on these households, even if paying monthly instead of annually. Data is needed to verify this assumption. However, the assumption is that some households do not pay dues because of insufficient disposable income. Since there are residents on fixed incomes who do pay the dues and others who do not, the key to answering this question is to interview as many of those residents as possible.

The processing of dues by the DVRC office must also be considered. The processing of dues needs to remain inexpensive and not create additional burden on an already limited staff. New technologies can remove some burden and costs, but can also create additional burden and costs. Online processing responsibilities require a certain amount of technical expertise with digital payment systems, understanding online security measures and other related skills. It is certain that payment processing in membership-based organizations, such as DVRC, is rapidly becoming a necessity. But can also put added pressures on limited staff and resources. Many nonprofit organizations are developing online payment portals through their websites to facilitate donations, member payments and contributions.

Tracking and accounting can also become more of a burden when payments are made at different times throughout the year (e.g., monthly, quarterly, annually, etc.). Ease of transactions is important for achieving a balance between the existing methods and moving towards using emerging technologies. It is clear that establishing office procedures for implementing new technologies and training staff is needed. An extensive educational program for residents is also needed to inform and educate residents about the availability of payment options and how to use them. This is the key to future success of implementing new technologies. Additional data is needed to better understand the relationship between increasing the fee, focusing on member recruitment and retention, implementation of various payment options and how any of these would impact the number of memberships.

BOARD AND BOARD FUNCTIONS

The DVRC Board is made up of seven members elected from the community. The Board oversees operations and the budget for the community. Obtaining information from residents about Board functions was desired during the input process. Several survey questions were asked regarding this topic. The following are the questions and responses received:

Q: Do you think the Board should hold fewer or more meetings? (Coffee talk survey)

How many meetings should be held?	# of Responses
Fewer meetings	12
More meetings	23
Keep the same number of meetings	10

Comments:

- I think having both study session and board meetings open to the public makes it difficult for board discussion
- Meetings should be once a month during summer
- Change to make them open (to all)
- Hold (meetings) in the spring and fall
- Ok as is
- (There is) no option

Q: How often do you think the formal Board meeting should be held? (Coffee talk survey)

Monthly	Bi-monthly	Quarterly	Annually	Weekly
42	10	10	2	1

Q: If there are not enough members willing to serve on the Board of Directors what do you suggest the membership do? (Coffee talk survey)

Board Membership	# of Responses
Decrease number of board members	9
Increase terms of board members	34
Provide Incentives to board members	34

Comments:

- Pay board members
- 7 members is ok
- Actively sell & promote the BOD
- Rewards? Bonus?

Q: Should non-members be allowed to attend DVRC meetings? (Annual Meeting survey)

Attend Meetings	# of Responses
In favor	53
Opposed	91

Q: Should non-members be allowed to attend DVRC meetings? (Coffee Talk survey)

Attend Meetings	# of responses
In favor	34
Opposed	21

Comments:

- Non-members should attend, but not be able to vote
- Perhaps offer one community meeting a year (as needed)
- Yes, allowing non-members to attend might provide information as to why (their) membership is needed
- Hold special meetings for non-members
- Yes, allow to encourage membership
- Yes, but not to vote
- Yes, as a silent observer only
- Yes, but requires non-voting
- If nonmembers attend DVRC meetings, they should not vote
- Nonmembers should only be allowed to attend (annual) membership meetings
- If nonmembers attend meetings they should have no input
- If nonmembers attend meetings it should be to observe only or comment briefly
- Nonmembers should be allowed at meetings but not be able to talk
- If nonmembers attend meetings they should not be allowed to vote
- If nonmembers are allowed to attend meetings they should not be able to vote.

As indicated above, there are essentially two schools of thought on this matter. Some members think the meetings should be open and others do not. This divide among members creates an awkward situation for the Board and causes unease within the community. However, many comments did state that non-members should be allowed to attend DVRC meetings, but should not be able to vote. There also appears to be some favorable response to holding at least one annual meeting that would be open to all residents. The information collected in the surveys does not seem to give clear direction either way.

COMMUNICATIONS AND TECHNOLOGY USAGE

Balancing the needs between traditional print media and emerging technologies can be challenging to any organization in today's society. DVRC is no exception. The following factors and dynamics should be considered by DVRC when developing solutions to balancing the use of old and new technologies and methods of communication:

- The community is, in effect, divided into two groups: members and nonmembers
- The community newspaper (*The Citizen*) is one month behind (articles must be submitted a month before publication)
- Traditional mailings are costly
- The community is large, containing nearly 3,000 homes
- Some residents are full-time occupants and others are seasonal
- There are apartment buildings that change ownership and residents. This is not within the control of DVRC
- There are rental properties in which the owner does not reside at the residence. Therefore, some homes require that both the owner and the tenant be contacted separately
- DVRC meetings are primarily open only to members
- Flyers, *the Citizen* and other print media are difficult to distribute since they are hand delivered by volunteers
- Some residents are home-bound, elderly or have physical limitations that restrict their ability to obtain current information
- Some residents do not use technology, or minimally use technology
- Technology has presented difficulties for the DVRC office; e.g., when the office is understaffed, or when the technology is too costly to acquire or utilize
- Some office technology will need to be upgraded in the future to provide necessary communications and this will cost money
- Emerging technologies are a continuing challenge

- Technology abuses within the community, particularly with social media, can adversely impact constructive communications
- Uncertainty about the future can lead to hesitation and indecision
- Technology requires specific competencies and skills

As noted throughout this report, membership recruitment and retention is crucial to DVRC’s success. To a great extent, that success is dependent on three major lifelines: (1) communication, (2) education, and (3) information. These can be challenging to DVRC for the reasons stated above, but are also crucial for the organization to remain viable and responsive. Two major challenges are:

- Capability of reaching residents in a cost-effective and timely manner
- The delicate balance of dealing with a community that is divided into members and non-members

DVRC has a website and a Facebook page. These two online resources are essential in today’s electronic world. DVRC’s website and Facebook page are impacted, in large part, by the following factors:

- Managed solely by volunteers, making management and upkeep problematic
- Dependent on volunteers to provide necessary information in a timely manner
- Upgrades are needed from time-to-time to keep technology current

The significance of this dilemma cannot be emphasized enough. In order to better gauge the community’s needs and perceptions about this topic, several questions were included on the surveys. It is believed that the DVRC website is underutilized by residents. As with most organizational websites, they must appeal to not only the clientele, but also to a larger audience. In this case, prospective homebuyers and realtors are prime examples.

Social media and email are other online methods being utilized by the DVRC office to help improve communications within the community. In order to be effective, websites, social media and other online communications must be interactive, easy to use and be kept up-to-date. The strategic plan is assessing the use of various media by residents in the community.

Q: DVRC does not presently have a contract with a website maintenance vendor. How important do you think website enhancement and social media (including email) are to fostering communication between DVRC and the community? (Coffee talk survey)

Importance of online media	# of respondents
Not very important	16
Very important	35
Extremely important	13

Comments:

- Did you ask the realtors?
- It depends on how good you are with the internet. I am not that good. I read the Dreamland paper
- I don't have a computer so I can't answer
- Brings in a younger crowd as homes sell to younger people
- Many residents not seeking information there
- It is somewhat important

Q: Would you support the idea of DVRC contracting with a webmaster to bolster DVRC's website in order to enhance communications with realtors, the community and prospective homebuyers? (Annual meeting survey)

Contract with webmaster	# of respondents
Yes	90
No	41

Q: Do you think DVRC should set aside funding to update and maintain the website utilized by new homebuyers, realtors and members? (Coffee talk survey)

Set aside funding for web	# of respondents
Yes	52
No	13

Comments:

- Do we always have to throw money at a problem?
- Intern may lead to employment
- Utilize a skilled member!
- How much funding?
- Have a "new homeowner" button

Q: How would you like to receive communications from the DVRC? (coffee talk survey)

Email	Website	U.S. Mail	Text	Other
56	15	15	21	Citizen (2) , phone reminders (1)

Q: Do you use social media applications? (Coffee talk survey)

Use Social Media	# of respondents
Yes	17
No	7

Comments:

- I use them somewhat

Q: If you use social media applications, which ones do you use”? (Coffee talk survey)

Next Door	Facebook	Twitter	Email	Text	Other
34	33	6	48	19	Linked In (1)

Comments:

- I get Next Door but ignore 95% of the postings!

Q: Our community newspaper, the Citizen, is available year-round, but only delivered November – April. Do you believe this newspaper is still relevant to our community? (Coffee talk survey)

Is the Citizen Paper Still Relevant?	# of responses
Yes	70
No	3

Comments:

- Yes, a picture is worth a thousand words

Q: If you answered yes (to the question above), what changes would you recommend to make the paper more appealing to new residents and to keep our residents better informed?

- Sell the idea of the 55+ Overlay
- Make sure it is delivered on regular basis
- Citizen editor is doing a good job. More suggestions to those delivering paper
- Yes, yes, yes
- Hope they read the paper and get involved
- They are available at the office and pools, even when the paper is not delivered
- It’s a good paper
- Publish more information about what membership covers and loaning kee cards to others
- More personal stories and pictures

It can be presumed from the responses that email, text and Facebook are useful online tools. Respondents replied favorably overall to hiring a website manager or vendor to help redesign and/or maintain the DVRC website. The website could become a more convenient communications tool for DVRC and the community if it is adequately maintained. An online payment portal could be added eventually. The extensive use of online resources will require educating the community on what types of resources are available how to use them. The Citizen newspaper is still valued by the community and is available both in print and online.

ACTIVITIES AND PROGRAMS

In order to remain current, DVRC must periodically evaluate its programs and activities. These are important in any adult community. It appears from the many comments received that

offering a variety of activities and programs are important to the community. It is also likely that activities and programs help retain members and are essential for fostering and maintaining connections within the community. Members at the annual meeting were asked to state their six (6) favorite activities and programs on the survey. The top ten (10) activities/programs identified by members are provided in Table 1. Table 1 is followed by all other activities and programs that were also mentioned.

TABLE 1

Rank	Activity/Program	# of Respondents
1	Swimming pools	71
2	Entertainment	55
3	Cards, bunko and card bingo	40
4	Pancake Breakfast	34
5	Exercise Room	20
6	Dinners, including potlucks	19
7	Woodshop & High Tea	14 (tied)
8	Singles Group & Hiking Group	12 (tied)
9	Computer Room	11
10	Pickle ball	10

Other activities and programs identified as important by attendees at the annual meeting were:

TABLE 2

Activity/Program	# of Respondents
Hot Tubs	9
Library	9
Fused glass	9
Bocce Ball	9
Walking Group	8
Lapidary	8
Coffee social	7
Poker	6
Golf	6
Art Room	5
Ceramics	5
Nature trail	5
Quilt club	5
Happy Hours	4
Shuffleboard	4
Bowling	3
Cribbage	2
Tai Chi	2

Book Club	1
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Numerous comments were made regarding the appeal of activities and the upkeep of facilities. The complete list is located in the appendices. The following are a selected few comments made regarding this:

- enjoy the amenities of the community
- I wanted to be able to do all things associated with DVRC
- We enjoy all the facilities we have in dreamland
- can enjoy whatever activity you choose or like to participate in
- Varied activities and organization
- Need to update activities
- Activities, neighbors
- Good friends in our age group. Activities
- Activities and the friends I have made since living here
- Pool, esp. Farnsworth pool, computer friends, pancake breakfast
- Posse
- Help Services

The coffee talk survey asked: “What do you value the most about living in the Dreamland Villa community. Numerous comments were received. These are located in the appendices. A few of the responses are as follows:

- Affordability
- Clean, quiet nice neighbor community event
- The peace and quiet of the neighborhood
- Friendly people, 55+ status, well maintained facilities, entertainment offered
- Being a 55+ community, the peace and quiet
- 55+, convenient to all shopping, doctors, pleasant upkeep of facilities

CONCLUSION

The strategic plan is being conducted as part of an effort to assess the needs of residents for decision and policy-making purposes. Obtaining current information is essential to the DVRC Board of Directors, tasked with governance of the community. As part of the data collection process residents have been provided with various opportunities for providing input. Input was collected primarily through surveys, small group sessions and community meetings. This information is helpful for defining the needs of the community and developing long-term strategies for addressing those needs. In total, 79 surveys were completed and returned at the four coffee talk meetings and 148 surveys from the annual meeting. The results have been summarized throughout this report and are provided in the Appendices, as follows:

- Appendix A – Coffee Talk Survey Comments
- Appendix B – Coffee Talk Flipchart Comments

- Appendix D – Annual Meeting Survey Comments
- Appendix E - Coffee Talk Evaluation Results & Comments (Total of all)
- Appendix F – Coffee Talk Survey form
- Appendix G – Annual Meeting Survey form
- Appendix H – Written Submittals

It is clear from the results of the input process that there are varying opinions, views and attitudes regarding the topics that were selected for the surveys and from the comments received. The more data and information that the Board of Directors has for making decisions, the better able they will be to guide the community in the future. Some solutions will likely involve difficult decisions to be made. Some will be easy to implement. In some cases, there are no clear-cut answers.

DVRC would benefit from obtaining additional data and from a vigorous educational campaign and outreach program to residents. Implicit from the information gathered during this process, future community meetings would be helpful to facilitate communications. It was also apparent that residents feel strongly about maintaining the 55+ overlay, activities, entertainment and events.

APPENDIX A

Coffee Talk - Survey Comments

The following responses were given to the following two questions:

- (1) “What do you value the most about living in the Dreamland Villa Retirement community?”
- (2) “Do you have any additional comments or input?”

We understand the importance of the 55+ overlay. Plus, enjoy the activities.
Yes, love the dreamland and want to support the community.
Yes, I want to support 55 overlay and am involved in activities.
Not a member – I didn’t realize the need to join because I don’t use the buildings.
55+ community and enjoy the amenities of the community.
Because of the ___ of the house and the friendly people
To <u>keep</u> the 55+ designation
I’m very interested in keeping Dreamland Villa a 55+ community
Yes, my wife and I want to support the organization.
Yes, to support the community
If you live in DVRC, you need to be a member
I feel 55+ is worth protecting to keep it a nice place to live.
I wanted to be able to do all things associated with DVRC.
We enjoy all the facilities we have in dreamland
Farnsworth most likely in 2021
Relinquish 55+ is the worst mistake you could make
The last dues increase decreased membership 15%
Not pool facilities- would lower value of homes, Increasing fees is very temporary solution, NO relinquish 55+
d) Try harder to get more members
d) other
d) actively sell/promote BOD
rewards? Bonus?
55+ overlay
55+ restriction, leading to quiet community. Benefits, although I need to use more.
55+ quiet neighborhoods. Good friends in our age group. Activities.
55+ overlay
Quiet, clean, over 55
Because there is quietness in the surrounding neighbors. Maintain the 55+ community.
55+ overlay
I like the people I’ve met! In comparison to other 55+ communities, it’s reasonable.
Quiet, can enjoy whatever activity you choose or like to participate in.
55+ Overlay, convenient to all shopping, doctors, pleasant upkeep of the facilities.
The people
Peace and quiet
55+ status

Friendships
Varied activities and organization
The new friends and activities
Properties are kept up and activities are available.
Being part of a desirable community.
Activities and the friends I have made since living here.
55+ - No kids – less crime
The Dreamland retirement is beautiful, clean, quiet and beautiful facility
Have a survey included. What would you like to see?
I think it is very informative.
Have more individual contact with members and non-members; have a website that is easier to navigate.
Probably the younger working non-members find our activities boring to them. Not really ready to participate. The Citizen currently covers whatever new is relevant to membership.
Volunteering groups “23” to go forth and let it be known of the versatility of groups.
“A picture is worth a thousand words”.
none
is already very well done
keep publicizing the importance of the 55+ community - it’s not a <u>club</u> .
Do not make the Citizen like a newspaper, do a tablet form.
Need to reach out and get resident non-members involved if you really wish to get an increase in membership.
Sales and marketing should be key focus!
Need to update activities and reach out to members who don’t reside near the current office.
Threatening to sell assets in the years past was a very damaging policy. When fees were raised to \$175, a number of members stopped paying dues even though a majority voted for increase.
Make it mandatory to join. Lower initial fee. More paying options.
Good meeting!
Thank you for all your hard work and time. Keep up the terrific work!
Not now.
No other comments.
Since in a 55 club community, want it to continue
No, I don’t pay because I rent
Yes because we value the 55+ status and the social contacts provided
Yes since 2000
No, cost, I don’t live here but when I have a renter, we will/may join
Yes, support my community
Yes, because it’s a 55 retirement community
It is important to support the organization to help maintain the advantages of the 55+ overlay
Because Dreamland is a nice place to live, low taxes, security, low fees, everything you would need is close by
I love living here – I wish more cooperation was available and people would realize the importance of being a member
Yes, 25 years
Yes, for 20+ years

Safe, clean neighborhood, 55+
Safe, quiet, friendly neighborhood, best place I've lived since I moved to AZ
55+ community
55+Overlay #1, Quiet, safe, friendly, home value has risen
Pool, esp. Farnsworth pool, computer friends, pancake breakfast
Availability of dr's, hospital, computer knowledge of classes, swimming pool, and stores
Close to what I value, everything in 5 mile area
RV Parking
55 Overlay
No HOA
The neighbors we have, the 55+ community, my <u>house</u>
55 and older status
Generally well maintained properties
It is a economical and safe place to live
Quiet place to live – no young people, teenagers or children
55+ community
Close to things seniors need: church, grocery store, hospital, doctors, labs, library, friendly people
Quiet, good weather
Activities, neighbors
55+ quiet, mostly well kept up
Sell the idea of the 55+Overlay
Make sure it is delivered on regular basis
Citizen Editor is doing a good job. More suggestions to those delivering paper
Yes, yes, yes
Hope they read the paper and come and get involved
They are available at the office and pools, even when the paper is not delivered
It's a good paper
Publish more information about what membership covers and loaning kee cards to others
More "personal" stories and pictures

APPENDIX B

Coffee Talk - Flipchart Comments

Coffee Talk #1 (September 7, 2019)

Group 1

Working people don't have time to volunteer
Need a list of the other 55+ communities and how they compare
Misinformation about just paying for the pools and not that the dues pay for the 55+
Have more activities on weekends
Volunteers to hand out coffee talk flyers in their neighborhoods
Use multiple means of communication
Separate out the costs to show what it costs to manage the 55+ from the other costs
Divide memberships into those who use the pools vs. those who only want to pay for the 55 + overlay
Need regular notices about payment options (monthly, quarterly, etc.)
In order to mandate 55+, the deeds would need to be changed by each owner to transfer the property as a 55+ in perpetuity
Include more current methods of communicating, e.g., email, text, etc.
Need leaders to organize more activities on the weekends
Need a membership page on the website for members to make payments, update their information, etc.
As the computer club to help the office with setting up the technology for improved communications
How many year-around residents are there compared to winter visitors?
Do weekly updates in a newsletter because the Citizen is a month behind
Have an electronic suggestion box
Create a Communications Committee (web, Citizen, etc.)
Need a new heading for the website and Citizen that are more contemporary
Website needs to be more interactive
Need electronic sign improvements at Farnsworth Hall (the sign is in the ROW so this may not be possible); the entertainment committee has discussed purchasing movie/poster sign boards for outside of the Hall to display upcoming events
Where is the list of committees? This needs to be on the website and also how to access the committees needs to be improved.

Group 2

Unanimous membership fees mandatory!
Rewrite the verbage –
Participation fee for nonmembers for events
Overlay plus amenities
Change “memberships” to “supporters”
Legal advice – consultation – to change, mandatory
Yard signs, “We Support Dreamland Villa – Ask me Why”

Explanation of OVERLAY. 55+ is not amenities
Do we pay school tax as a 55+

Group 3

Board address staff help
Jack and Diane helping, pleasant
Need-?
More maintenance - / disagreement ?
Financial statement in paper is an improvement
Developed good will by real estate agent
Demographic is changing
See purpose for director, but scary, figure on paid position and how to pay; see need but how can afford, facts first
Jack given authority to manage
Charge of \$10 is too low for non-member use of facilities as a guest
Encouraging when negative statements?
Make HOA mandatory; open to new ideas
Make feel welcome
Office nucleus
Payment matter of priority
Choice to be involved
Work and take advantage of amenities
More advertising about property values – membership tied to property values
Charge individuals monthly rate of membership
Would like to make mandatory HOA
Help keep 55+ by contributing
Pick committee that needs Chair – and write up in Citizen
Welcoming committee synopsis in packet
Write-up in Chairperson
Neighborhood watch most important – meet neighbors
Potluck beneficial – have lots
Combine committees
Residential sales and marketing – office is doing. Management is positive
Advertising – consistent with colors and logo; branding, office staff
Rewards, acknowledgement – luncheon, breakfast once a year – consistency
New resident orientation – target specific committees and events
Follow-up with people
Volunteer committee chair – follow-up with person interested; contact on monthly basis
Website occasionally used
Facebook/Next Door
Citizen positive –
Email blast – volunteer/office – job description

Coffee Talk #2 (October 19, 2019)

Group A

Coffee talk with realtors
Tier payment:
Full \$175 with amenities
Partial \$100 without amenities
1 week/year full use for the 2 nd tier
Neighborhood watch and Welcome
New resident – within a month – whether their transfer fee was paid
Calling tree when necessary

Group B

Do not want to be called a Club
Membership (?)
Open to all residents
Need to motivate the community
Welcome door-to-door
Price of Farnsworth Hall too high
Need membership – marketing committee
Email file – needs used
Get realtors correct information
Parties to socialize
Potluck not welcome
Board meeting should be open to all
Very few check the website
People do read the Citizen
People volunteer for things but then don't hear back

Group C

Why don't people pay their dues? We need to know this
Make sure kee cards are not needed to attend coffee talks
Realtors are an issue
The 55+ is a cost
Flippers don't pay the \$400
People want the 55+, the younger people don't use the facilities
Market the 55+ and not the activities
The amenities keep the property values up
Call the \$400 fee a 55+ fee
Need to reach out to new residents more aggressively
Welcome new residents
Correspondence from the office needs to emphasize the 55+
Taxes are lower here. Pay more in Mesa. What is the difference in taxes? We pay a separate fee for fire and rescue
Have autopay for annual dues. Rural Metro has that and DVRC should too

The Posse is a plus. Security is important
New Resident Orientation does not emphasize the importance of the 55+ and importance of annual dues. One member stated the topic never came up when he attended
De-emphasize the amenities. The \$ is for the 55+ overlay
We need to know the costs per person for DVRC
Institute a tiered payment system for those who don't use the facilities
HOA – we can't go back
In similar housing areas that aren't 55+, the general upkeep is much worse, e.g., in West Mesa
Can DVRC charge an extra assessment for repairs?
Board needs to meet with committee chairs on a more regular basis

Coffee Talk #3
November 16, 2019

Group A

Membership – see attachment
Fee for 55+
Fee for amenities
Pay monthly
Household fee \$175 single \$300 double \$ ___ 3 rd person?
No money to pay management, agree it is needed
55+ - need to do more to educate residents
Need to organize and keep up the lists
Email
Rotate
Sign-in sheets available – open house
Missing Block Watch
Citizen newspaper is important
Get information to renters
Keep properties cleaned up
More contemporary activities
Younger people needed
Food Handlers license – 3 years
Need kitchen manager
Need new board members

Group B

The amenities add value to the homes
Are taxes lower in the County? Probably yes, but we have to take into account the extra paid for Rural Metro

Ask, Why did you move here and what do you expect from it? 55+ is a selling point and a big bonus
Two people have to pay – if only 1 paid, can this be done? Or can pay per household?
If two people in a house, what if one pays full price and the other gets a discount?
RV parks are more expensive compared to us
New resident packets need information on payment plans
Need more follow-up with new residents
Need to educate realtors
Call the membership fee something different, e.g., association fee, associateship fee, subscriber fee, community fee. Community fee was a favorite of the different ideas
Implement a two-tiered approach, e.g., \$220 for members to use all facilities and \$175 for limited use in order to support the 55+. Both would have voting rights
All residents should be able to attend the meetings

Group C

Find out the wants and needs of the people who are not members
Community has changed to a semi-retirement community
Can't afford dues is reason for not paying
Can't go for free pass if can't afford it
Members turned off by the lawsuit
No new activities such as scrapbooking, etc.
Need more relevant activities
To do's at holidays; holiday functions
Find out what people want
Business committee – to teach
Dreamland University – to teach
Three studies in office – ask why they were motivated to move here
Segregation of group – members vs. nonmembers
Need financial statements
Nonmembers don't show up to things
Dual use of facilities for working people
2018 spike in membership due to donation and increase in members
List of benefits to being a member – total benefits
Everyone should know fee difference in other communities
Need video on website – Walking Tour of Dreamland
Need video of what it would be like if not 55+
Need committee to address new people and draw them in
Re-engagement program for nonmembers
Conflicts should not occur at Board meetings; address conflicts at executive sessions or study sessions. Should be united at Board meetings.
Find out what people want to volunteer for
What is the benefit of volunteering on a committee?
Committee list in new member packet
Volunteer information is not being communicated
Jack and committees in guts and stickman

List of volunteer opportunities
Volunteer meeting to include nonmembers
Volunteer appreciation throughout the year
Need to leave the past behind
Why can't we see real financial statements?
Coffee talks – December, January and February – 60% friends come later

Coffee Talk #4 Flipchart Comments

Think of how to better engage working residents
How to survey property owners who have rentals. Contact owners for feedback. Build annual fee into a rental fee.
Escrow needs to include IMF fee
How can we improve communications with new homeowners about fees and other information?
Benefits to Members? Consider discounts and social programs.
Volunteer commitment – need to be engaged with community
Farnsworth Hall needs better bathrooms for large concerts so more money can be made. Need to do more fundraising to pay for bathrooms. The fundraising would be specifically for F. Hall.
Entertainment that appeals to younger residents
Stress time commitment to volunteers. They are not working alone.
Have co-chairs instead of single chaired committees.
Need fundraising Plan – and community events to raise money, e.g., garage sales, Community sales, Chili cook-offs, Bake sales, Arts and crafts sales
Hold community meetings for all residents
How do we raise memberships rather than dues?
It has to be beneficial to belong to DVRC
Target the working people to have the events they want
We need a viable fundraising committee
Lack of bathrooms at Farnsworth is an issue.
Accurate cost estimates for improvements are needed.
Thermometer for fundraising and memberships drives
All nonprofits have a paid administrator
Farnsworth Hall is our best moneymaker

APPENDIX C

Annual Meeting Survey Comments

The survey asked for written responses to the following question: “What other comments do you have that would be useful to DVRC? Respondents also wrote in the margins of the surveys. Those remarks are also included below.

I love living here, or actually spending the winters here. So happy for this opportunity.
What are the Board’s plans to increase memberships? You have talked about it for years but presented NO ideas.
Have a consistent program to publicize and point out the value and special place this is and how everyone needs to support the community in order to sustain it.
Love the new office staff. Very respectful and receptive. Love DVRC and what it offers. Thank you Board members, Jack and Diane. Also, how can we make paying dues a responsibility and not a choice of yes or no? \$225 is a small figure for what we receive.
Keep up the good work.
I only use the exercise room but feel the other activities are important. I golf because of the golf course closing I go elsewhere. I would support an increase in dues only if the Posse receives some of the funding.
A monthly payment option should only be valid during the month it is paid.
We need to bring back HOA – we need to be able to police unkempt yards and so much more. I would support an increase in dues if you fund the Posse whom I donate to.
Keep the 55+
I do not use facilities; I support by volunteering
We attend all special events at the halls
If dues are raised, do it gradually, not directly to \$225, then I agree to increase, otherwise I am opposed. Nonmembers should be allowed at meetings but not to vote. We are happy there is no HOA. But a few of our neighbors yards are potential fire/health hazards – boxes stacked in driveways, furniture for yard sales stacked visibly inside yards. Is there a community remedy for this or must we rely on County laws?
A lot of cars speeding on 56 th St between University and Adobe – I’m seeing a lot of boxes and weeds on a lot of properties.
If monthly payment option is available it should be only on autopay and get kee card right away. If nonmembers attend meetings they should not be allowed to vote. Considering too big of increase at one time. Smaller increases over longer periods.
Use all facilities
Dues should not be optional
Put the negative past in the rear view mirror and be a positive force going forward. More communication, especially with non-members.
We need stronger control over neighbors who have their places in a mess. We are only here 4 months out of the year so we don’t want the dues increased. Nonmembers should be allowed at meetings but not be able to talk.
Keep 55+ overlay. Help clean up mess of some. Too many cars on roads. Trash in yards.
Do away with the Transfer fee! Enjoy 55+ and activities at Farnsworth Hall.

I don't use any facilities at present. Would consider swimming if a salt filter is used. Possibly woodworking.
Dues should be per household, not by person living in house. That's the way it was 25 years ago. Nonmembers should be allowed at meetings but not to vote.
What would the bookkeeping cost be to have a monthly option to pay dues? I agree with auto-pay option but would not use it. Pancake breakfast is great. What would be cost of contracting with a Webmaster?
Have a welcome committee. More for single people who work.
Don't raise dues, can hardly afford now.
It will continually be a challenge to maintain the needs of an aging 55+ residence when it is not mandated that everyone pays. If rates rise, more may not pay, leaving costs on backs of people who do.
I volunteer whenever needed. In regard to the increase, there are retirees that are not receiving additional monies/income, etc.
I attend special events at the halls
I enjoy activities/programs at the halls.
Promoting the dues as a maintenance fee instead of activity fee. Many people just think the money only goes for optional entertainment, pool, etc.
Nonmembers should pay a higher price for musical events. Do not allow PERMANENT on-street parking of any kind! Limit high tea to members only.
Stay positive and civil. I enjoy board meetings (happy face), social hours and meeting people.
Non-members at meetings should not have a vote.
Dues should definitely be raised!
Have board members get along going into the new year.
Do more for our members, they come first. We have a great board – let's not have any more fighting. Good job Johna. Good luck if _____ is elected.
If nonmembers attend meetings it should be to observe only or comment briefly. I use/enjoy the web pages. Instead of hiring a webmaster communicate directly with realtors, home buyers, etc. I volunteer at DVRC. Need bus day trips. Office staff is doing a good job. Neighbor watch is high priority. Annual meeting - very good.
Make meetings shorter and more specific – eliminate duplicate comments that drag out meetings.
Stress we pay the dues to support our great community and what we have. The \$175 is the cheapest in Mesa.
If nonmembers attend meetings they should have no input.
We need to have more social activities.
I attend events/activities at the halls.
Used to use shuffleboard – not available now? Have shuffleboard activities.
If allowed to pay monthly, should not get card until paid in full. Nonmembers should attend but not vote. Need to work and enforce Maricopa rules in neighborhoods. Need to look into getting no parking signs up in neighborhoods; takes 80% signatures on block?
Lower the annual fee. I do not have a computer or fancy phone so contracting with a webmaster is meaningless to me.
Great job! Nonmembers should only be allowed to attend (annual) membership meetings.
If you can't get people to pay \$175 now – WHY would you raise fees – you will drive more people away from paying, period. Lower it, if anything, to attract more people. I enjoy crafts and

gatherings, 55+ status. #1 safe and quiet. Sense of community – comments made in the meeting against others defy community – NO answers TO HOW TO raise dues were addressed. We all know the problems. Tell us your PLAN to <u>rectify</u> .
Have Board meeting and study session in daytime.
Don't use the facilities
Only hire webmaster if affordable. So sad we can't have mandatory dues.
Only hire webmaster if their budget is limited and contract is not given to board members, relatives or cronies.
Don't raise dues over \$210/yr.
Put some enforcement in the by-laws
Don't participate in any activities/programs
Don't participate in any activities/programs
If nonmembers attend DVRC meetings, they should not vote. We appreciate everyone.
Must have some form of censure for non-paying members, e.g., higher costs for tickets, no paper, etc.
Our present Board is awesome; if nonmembers are allowed to attend meetings they should not be able to vote.
Keep up the good work. If nonmembers are allowed to attend meetings they should not be able to vote.
Strategic planning is a great asset. Recognize demographics have changed here, so need to continually discover what will best work for DVRC for future. Should nonmembers attend meetings? – at least special meetings. I appreciate the help from the office. I don't support a webmaster at this time.
I would like to see the by-law forbidding no vehicles parking over 72 hours be enforced.
Add value to having a membership - reduced price to shows and events or opportunity to buy tickets before they go on sale to general public.
Other places charge people additional if they are not members e.g., tea is \$15, charge \$15 members, \$20 nonmembers.
Raise dues only if monthly payments are allowed.

APPENDIX D

Coffee Talk Evaluation Results and Comments (Total of all)

		Excellent	Very Good	Good	Fair	Poor
1.	Overall rating of the coffee talk	37	31	8	3	
2.	Quality of the format	32	34	11	1	
3.	Quality of the information	39	29	13	2	1
4.	It was well organized	41	29	10	1	
5.	Handouts were helpful	27	30	7	2	1
6.	Preparation and use of visual aids	31	35	14	1	1
7.	Response to questions	31	33	12	3	
8.	Met your expectations	31	31	11	3	
9.	You feel you were heard	37	21	13	2	1
10.	It was worth your while	43	23	9	2	1
11.	The coffee and food was good!	34	19	8	2	1
TOTALS		384	315	116	22	6

79 total evaluations were returned.

Comments made on the evaluations:

- Learn what was successful in the past and replicate it. Stop doing what failed for 7 years.
- Hold in months when more people are present (snowbirds)
- Less pre-information to break-out groups
- Have more time for small groups and less time on a large group being talked at
- More visual aids. Volunteer written out along with a few pictures and/or people who volunteer give a talk changing every month. 23 position of volunteering is a lot to be utilized.
- You're on the right path!
- Hold community meeting to get feedback of what they want.
- Do not get ahead giving own suggestions
- Good job

- It was great
- Give more information
- After this one you will know what facts/info. to have ready, e.g., committee lists what the office currently has in the works, etc.
- Focus on one item at a time, brainstorm ideas, bring up ideas for events, bring in new ideas – new events to gain younger volunteers and continuous memberships
- Improve how we let people know about meetings
- Just have more!
- Thank you!

APPENDIX E

Coffee Talk Survey FORM

1. Are you a member of DVRC? Why or why not?

2. If DVRC is unable to remain financially solvent due to insufficient income, what do you suggest the members instruct the Board to do?

- _____ a) Sell assets to generate funding
- _____ b) Increase the annual membership fee enough to stay solvent
- _____ c) Relinquish Dreamland's 55+ status; allowing for a more diverse income base

3. If there are not enough members willing to serve on the Board of Directors what do you suggest the membership do:

- _____ a) Decrease the number of Board members (currently 7 positions)
- _____ b) Increase the existing one, two and three-year terms to reduce turnover
- _____ c) Implement an incentive program for Directors

4. What do you value the most about living in the Dreamland Villa Retirement community?

5. Currently the Board of Directors does not meet during the months of June – September; except for emergency meetings. A Study Session is held the first Wednesday of the month and the formal Board Meetings are the second Wednesday of the month, from October to April. These meetings are open only to members.

Do you think the Board should hold fewer or more meetings? _____ Fewer _____ More

How often do you think the formal Board meeting should be held?

_____ Monthly _____ Bi-monthly _____ Quarterly _____ Annually

Should non-members be allowed to attend the Board meetings? ____ Yes ____ No

6. DVRC does not presently contract with a website maintenance vendor. How important is enhancing the current website to help foster communication between the DVRC and the community? Please choose one below.

_____ Not very important

_____ Very important

_____ Extremely important

7. Do you think DVRC should set aside funding to update and maintain the website utilized by new homebuyers, realtors and members? _____ Yes _____ No

8. Our community newspaper, the Citizen, is available year-round and is delivered November – April to all households. Do you believe this newspaper is still relevant to the community?

_____ Yes _____ No

If yes, what changes would you recommend to make the Citizen more appealing to new residents and to keep residents better informed?

9. Do you use social media applications? _____ Yes _____ No

If so, which ones do you use? _____ NextDoor _____ Facebook _____ Twitter _____ Email

_____ Texting Other applications (please list): _____

10. How would you like to receive communications from the DVRC?

_____ Email _____ Website _____ U.S. Mail

_____ Text _____ Other _____

11. Do you have any additional comments or input?

Thank You! Your comments are appreciated.
Strategic Planning Committee

APPENDIX F

Annual Meeting - Member Survey FORM
January 11, 2020

1. Currently, membership dues can be paid either quarterly or annually. In your opinion, should a monthly option also be made available?

_____ Yes

_____ No

2. Would you use an Auto-Pay option for paying your membership dues if it is made available? (Auto Pay allows you to have your dues automatically deducted directly from a checking/savings account or credit card on a specific due date).

_____ Yes

_____ No

3. DVRC is considering increasing the membership dues in 2021 from the current \$175.00. (The previous dues increase occurred in 2015). The increase would be based primarily on projected overhead costs for the next 5 years, considering inflation rate of 2.0%. This could result in either a \$35 increase or a \$50 increase over the current amount.

$\$175 + \$35 = \$210$ annually (\$17.50/month)

$\$175 + \$50 = \$225$ annually (\$18.75/month)

Would you support an increase in the membership dues up to \$225 annually to help keep up with inflation and cover projected overhead costs for administration and facility upkeep?

_____ Yes

_____ No

4. Should nonmembers be allowed to attend DVRC meetings?

_____ Yes

_____ No

5. How long have you been a resident of Dreamland Villa? _____

6. List the six DVRC activities and/or programs you enjoy or use the most:

7. Would you support the idea of DVRC contracting with a Webmaster to bolster DVRC's website in order to enhance communications with realtors, the community and prospective home buyers?

_____ Yes

_____ No

8. Are you retired or still working?

_____ Retired

_____ Working

9. What is your age group? Check the appropriate selection below.

_____ 55 - 65

_____ 66 - 76

_____ 77 - up

10. What other comments do you have that would be useful to DVRC?

Thank

DVRC Mission Statement

Our mission is to offer events, activities and facilities for the enjoyment of our residents and to maintain Dreamland Villa's status as a 55+ age-restricted retirement community.

APPENDIX G

Written Submittals

2011= We decided to buy a home in Mesa, After looking at homes in various areas, we decided we needed to buy a home in a 55 community for many reasons. Dreamland and Sunland were both very inviting. Decided on Dreamland, was well kept for the most part, it was a nice place to live, with tolerable property taxes because it is a county island and not in the Mesa city limits which alone saved you enough to pay your Dreamland Dues. Has an established dedicated security (similar to what a gated community would have, where you had to pay dearly for in your HOA monthly fees) rather than depending on the city police force. Annual fee was very low, (\$115 per person). Lowest of any we looked at, most had an HOA that was paid monthly, which added up to a pretty large chunk over the course of 12 Months. Dreamland was less than \$10 a month per person you were only required to pay for one person. We chose to pay for both of us, mainly to support the 55 plus, even though we used no facilities a for along time, I did join the computer club at a later date and started using the exercise room just recently.

Then came the end of the law suite, at which time the individual payment was voted on to raise the fee to (\$175 per person) which I voted for because too many people forgot the main reason why they bought a home in Dreamland for the most part because it was a nice place to live. Did anyone contact the owners that stopped paying when the annual fee was raised to ask them why they chose to let Dreamland head for the graveyard, which is what is going to happen over time if the property owners refuse to support it.

How many property owners are there? How many were paying the annual fee before losing the law suit when Dreamland operated on \$115 per person? How many are paying now that it is \$175 per person?

The excuse you typically here why people aren't paying is, they aren't using the many amenities. If I decided to stop paying, it would be because to many property owners are not willing to pay a little to keep it a nice

place to live, which like us, was probably the main reason they bought here in the first place and not because it had a swimming pool and club house. Maybe Dreamland should de-emphasize the amenities and campaign to sell Saving Dreamland as a 55 plus community, The amenities would just be a an added benefit. Management will have to stop using maintenance costs as a reason to pay their dues which turns people off and gives them an out by saying they are not using them.

Would it be possible to get enough people to pay if each household paid a lower amount per property and a larger or separate amount if you wanted or needed a key card to do what you wanted to get involved in?

I see in the presidents letter that you can put it on your credit card. Since so many things come due at the years end, County Taxes etc. I would rather pay it monthly with a automatic pay coming out of my checking acct. This is what Rural Metro does and it works out very well. Seems like \$15 a month would only cause you to sacrifice going out to eat one less time per month, and would probably be better for your health than going to a buffet and better for Dreamland.

RE: Strategic Planning

Resident Comments – Strategic Plan

Terry – Best wishes for you and your strategic planning committee: RE: June 2019 *Citizen's* article titled *Dreamland Villa Strategic Plan*.

I have a question. Are you planning on building a road map to further DVRC's mission¹ as is referenced in the first paragraph? Or is the committee working only for the "club's" members as stated in the second paragraph of the article? The mission statement addresses "*residents*" and makes no mention of "*members*" or the "*cute little club*". My conundrum is that there are only 1,650 +/- "members". There are an additional 3,200 residents who are part of the Dreamland Villa Community but have not been motivated to become members of the "cute little club", since they do not use the "cute little club's facilities or activities..

As you are no doubt aware, In January 2017 – 563 members voted overwhelming to drop the word "club" from the Corporation's name so we could become a Retirement Community. Only eight members voted against the name change. The name change resulted in a new marketing strategy to *recognize the Corporation's dual legal responsibilities: Dreamland Villa is a 55+ age restricted retirement community with facilities and activities for ALL its residents who have a current kee card.* (Reference April 2016 *Citizen*, page 1)

Surveys' dating back to the early 2000's showed that more than 70% of the new residents moved into our Community because it was 55+ age restricted whereas less than 25% of the home buyers bought because of the club's activities and facilities.

2017's new marketing strategy, promoting our Community and not club membership, resonated with the residents.. For the first time since 2011, the 2017 total annual revenue exceeded \$500,000. By March 31, 2018 DVRC had its FIRST INCREASE in the number of residents buying kee cards. At 3/31 - 2018 = 1,894, 2017 = 1,678, 2016 = 1,793. And at 3/31/2019 = 1,623. By May 31, 2019 DVRC had the least amount of total revenue compared to the May 31st of the previous four years.²

The impact of running a "cute little club" obtained from the historical records show that from 2011 to 2016 the number of Dreamland Villa Community residents who paid the "cute little club's "member" fee **decreased 48%** from 3,694 members in 2011 to 1,906 members at 12/31/2016. Marketing the "cute little club" has been a failed strategy³.

For seven of the last nine years the Corporation marketed its self as a "cute little club" and each year the number of residents who financially supported the Corporation declined.

June 18, 2019

Page Two

As part of your strategic planning, is your Committee going to decide if the Corporation known as Dreamland Villa Retirement Community is going to continue to be run again as "cute little club" for its +/- 1,650 *members*? Or is the Corporation going to manage the Community for all

its +/- 4,800 RESIDENTS as envisioned by the 563 members who voted in 2017 to drop the name “club”?

1 - The DVRC MISSION STATEMENT shown on the top of the front page of the Dreamland Villa website: “*Our mission is to offer events, activities and facilities for the enjoyment of our residents and to maintain Dreamland Villa's status as a 55+ age-restricted retirement community.*” Please note the Mission Statement’s emphasis is on the word **RESIDENTS**, there is no mention of “members” or “club”.

2 – Total revenue at May 31st for the following years:

2019 \$383,689

2018 \$427,827

2017 \$391,339

2016 \$401,677

2015 \$388,705 (Adjusted based on the 2014 Audit report, Citizen April 2015)

3 - The directors have stated that they needed to find a way to offset the loss of the John’s Villa +/- \$7,000 annual lease. The 2019 decline in annual revenue is not from John’s Villa restaurant, rather the decline in revenue is a result of fewer residents paying the annual fee and or other fees such as the former Transfer Fee and 55+ Fee. For 2014 2,454 residents paid the annual dues of \$125 whereas when the dues were raised 40% in 2015, only 2,085 residents paid the increased dues of \$175. With every historical dues increase, the number of residents paying the higher dues has ALWAYS decreased.

I read your comments that the *committee is reviewing the current mission, vision and values statements and gathering the necessary data and information for the document.* (Which of those words seeks to determine how to motivate more residents to financially support the Corporation?)

I am pondering why the primary mission is not to find ways to motivate residents to financially support the Corporation? From 2011 to 2016, 48% fewer residents support the marketing concept of being a member in a club whose facilities and activities they do not wish to use. At 5/31/19 total revenue is down 10%+ compared to last year.

Is the committee going to determine whether to sell Farnsworth or Read Hall since in five years the declining number of club members will not produce the revenue to support maintenance and operations of both facilities?

If the goal is to complete the mission by March 2020, is that not too late to impact or improve the 2020 fund raising campaign's marketing strategy? Terry, in seven of the last nine years the annual fund raising has centered around asking the residents to pay dues and become a member of the "cute little club". Between 2011 and May 2019 the number of those residents who are willing to pay the annual dues to the club has declined from 3,694 in 2011 to fewer than 1,650 at 5/31/2019. The only periods that

had increases in total revenue and the number of residents paying the annual fee were all of 2017 and the first quarter 2018.

Is the committee going to consider and respect the wishes of the 563 members who in 2017 voted to DROP the word CLUB from the Corporation's name?

The surveys dating back to the early 2000's show fewer than 25% of the new residents bought because of the club's facilities and activities whereas more than 70% bought because the Community was 55+ age-restricted.

The historical evidence clearly demonstrates (7 of the last 9 years) that marketing the Corporation as a membership driven club has been a failed strategy. 2019 has once again proved that attempting to sell membership in a club is a failed strategy. How does building fences around the club, to keep the residents out, motivate residents to financially support the Corporation?

2017 and the first quarter of 2018 proved that a new and different marketing strategy could motivate more residents to provide their financial support for the Corporation

From your responses, it is apparent that after seven months of existence the Strategic Planning Committee has not collected data and information to address the following:

Why were the 15 months from 1/2017 to 3/2018 so much more successful compared to calendar year 2019? (Successful measured in terms of total revenue and the level of memberships purchased or annual fees paid.)

Without knowing the projected recurring annual operating expenses, how would one know how much the annual membership fee should be increased or what the reduced operating costs might be from the sale of assets? Dues were raised 40% to \$175 at the beginning of 2015 and membership declined 15% as a result. What would be the accelerated loss of membership at various incremental dues increases?

How will increasing the paid staff by hiring a Paid Administrative Nonprofit Manager (or any other new paid position) impact the annual recurring operating expenses?

What strategies will be implemented that will cause 2020 to be different than the periods 2011 through 2016 and again in 2019? What happens if those trends continue through the end of 2020? If those trends continue and 2020's revenue is about \$390,000 (10% LESS than 2019's expenses, either budgeted or actual) what changes in 2020 will be necessary to lower the recurring annual operating costs?

It is noteworthy that the committee has three members who implemented the strategies resulting in the 2019 financial and membership declines. What is also noteworthy: the primary person responsible for developing and implementing the successful strategies for 2017 and the first quarter of 2018 is persona non-grata.

We have a lot of developing companies or landlord's buying the homes. I don't think they care what happens. Could we charge them a fee for owning a home and not living in it. I know some buy memberships but it would be interesting to know the % that does. It is tough no matter what. It seems many of the new home buyers are just not interested. They have their own little life and that is what they want. That is just what I see. I think when they bought they just liked the area because most of the areas are very nice looking. I don't think most of them care what else there is. The library stayed open an evening nobody ever came. Meetings are held at night and everyone that comes is retired and does not work. It would be nice to have day meetings again. It is very difficult for me and many others to do night meetings. Sorry for the late response but I had a little time. I will read over all the papers you sent tomorrow and maybe I will have more to say. We have been here 5 years and in the last 3 years things have really changed. I think how the world is and everything everyone is just tired of talking about changes. We have a beautiful community. It seems that some are just moving to a different area instead of trying to work things out. The other day I heard someone was moving and I asked her why. She said just tired of it all and decided it was easier to just move just outside of Dreamland Villa. I don't know if any of this matters but I feel bad I cannot attend the meetings. Thank you Terry for all that you do. I have talked to some who have been here many years and they say they don't want to have anything to do with it.

Date: 11/25/2019

Suggestion: I believe the \$175 annual fee is so reasonable and will gladly pay to help maintain our community as well as use our wonderful facilities. That being said I truly wish at least a minimal fee should be implemented to those that just want a nice community. \$50 annual fee or whatever...even \$25. It certainly would help keep our community clean safer etc. as monies could be used for those purposes. Just a suggestion and I realize our annual fee is voluntary.

How do you suggest implementing: Not sure how to implement as our \$175 is voluntary. Maybe some kind of incentive for both...the \$175 and reduced minimal fee. \$175 incentive more of an incentive than the minimal but it seems people just need to be "rewarded" nowadays. Pretty sad but true. We need to find a way to bring in more revenue to maintain our community and all that entails.
