

Venture Out

- 1,749 spaces, owners own their own lots, park model mobiles and RV spaces.
- No golf course. Large recreation/event building which includes a ballroom, a diningroom which seats 400, a coffee shop and sports bar.
- Association fees are \$1,600 per year (approx. \$134/month) per unit. They raise the fee approximately 6% per year.
- Had a one time special assessment of \$2,287 for the new recreation/event building.
- They have a General Manager and Activity Director. The Activity Director reports to the GM and has a paid staff of 11. There is a paid staff of approximately 50 employees.
- There is a \$1,500 development fee for new buyers.
- GM is a member of the Community Association Institute.
- Their GM was extremely important in guiding the Community Assn (HOA) through the process of construction of their recreation/event building, as well as in implementing other aspects of long range planning projects.
- A good attorney is essential to revise bylaws, raise dues/assessments, development fees, building project matters.
- It takes a minimum budget of \$3M to support a full-time, paid GM position.
- It is critical that an Assn develop a well planned campaign to get homeowner buy-in/support of any building project, and staffing changes, i.e. hiring a GM or AD.

Viewpoint

- 2,000 spaces, 400 are RV's, remainder are park model mobiles and resort cottages. Owners do not own their own lots. They are located on 300 acres. Viewpoint was established in approximately 1983.
- Viewpoint is not considered a community, but rather a REIT (real estate investment trust) which is publicly traded on Wall Street.
- 27 hole golf course. Large recreation/event building with a ballroom that accomodates 1,500 people. They have banquets at least once a week with a featured singer/band.
- They don't have a homeowners association, they have a residents association. Association fees are \$4,500 per year (\$375/month) per unit. Fees include water, sewer, trash, local telephone, extended basic cable, irrigation upkeep, and resort ammenities, i.e. pools, clubs & organizations, fitness center, restaurants.
- There is no development or impact fee for new buyers.
- They also offer 3rd party rental services on homes owned in the park. Must go through a point system to determine if home is acceptable to be rented. This helps control the image of the park for visitors and renters.
- The General Manager is over everything - Residents Assn and golf course. There are 10 departments under her all with supervisors: golf

course, restaurant, banquets, rentals, sales, activities, accounting, office, phone & cable, and maintenance. These are all paid positions. There are also approximately 100 volunteers assisting certain divisions during the season and approximately 28 "work campers" (RVers who work 25 hours a week in exchange for RV space during the season).

- The Activities Director makes approximately \$50K per year, plus a benefit package, plus perks, i.e. vehicle. The General Manager makes approximately \$80K per year, plus a benefit package, plus a bonus. The GM might start at \$65 to \$70K initially. Good place to recruit is on Monster.com - search under *hospitality*.
- The Activity Director is a 7 day a week job so they use volunteers a lot. Duties include ticket sales for all events (they have their own Box Office/Ticketmaster), preparing the newsletter and all communications, planning and booking groups/entertainers for weekly banquets and dinner shows, and all food and beverage for these shows.
- 75% of their residents leave for the summer. The GM and AD use this time to work on special projects to get ready for the next season. They also have a full time, year round staff of 70.
- They use resident focus groups to assist in any decision making.
- GM is not a member of the Community Association Institute as they are not considered an association.

Fountain of the Sun

- 2,356 spaces. They have condos, homes and park model mobiles. Owners own their own lots. FOS was established in 1973.
- They have an 18 hole golf course.
- The General Manager works for FOSCA (Fountain of the Sun Community Association). There are 14 homeowner associations in FOSCA which includes 13 representing the condo owners, and one which represents the owners of houses. The golf course operates separately from the 14 home/condo owners associations.
- The monthly fee is two part: FOSCA charges each unit \$425 per month and the homeowners charge currently around \$111 per month for a total of \$536 per month per unit. FOSCA's fee includes park security, all the recreational facilities and activities, and street maintenance. (Their streets are not city streets and have to be maintained by the park). FOSCA can raise their fees 10% per year but only raise them to accommodate any rising costs. The Homeowners Assn tries to work with FOSCA to keep the fees reasonable.
- There is a \$1,000 impact fee to FOSCA and a \$200 fee to the HOA for new buyers.
- The GM is only over the FOSCA and the position consists of one full time and one part-time employee. The Activity Director and the Maintenance positions report to the GM.
- The Activities Director meets with an Action Committee once a month to

plan events. The Action Committee is comprised of several individuals from each club/organization and representatives from the homeowners groups.

- FOSCA reviews the GM's performance and the GM reviews the Activities Director and the Maintenance position's performance.
- Approximately 60% of their residents leave for the summer.
- The GM is a member of the Community Association Institute and was hired through a job opening site on the CAI website.
- The AD meets with other community association ADs and they publish any job openings that they know about. (Contact Jan Sauers if we decide to advertise for this position).
- A book entitled Compensation & Salary Survey can be purchased for the CAI website. Board members and Associations can also join CAI which gives a wealth of information - www.caionline.org.

Leisure World

- 2,664 sites which include condos and houses. House owners own their own lots, condos do not. It is a gated community and their streets are private, not city streets.
- They have 2 golf courses.
- The General Manager (called Community Manager) is over the golf course and the community association with 8 department heads under him which include Recreation, Security, Housekeeping, Golf Course, Finance, Wellness, Maintenance, including pool maintenance, etc. They have 153 paid employees. Almost all departments also have a volunteer staff.
- The Activity Director (called Recreation Director) has 4 paid staff members year round and 10 additional seasonal paid employees - seasonal employees can be either part time or full time and are often residents of Leisure World.
- Their monthly association fees are \$179 a month which includes street maintenance, security, common area upkeep, clubs and activities, fitness center, employee compensation. \$10 of this fee goes to golf course upkeep.
- They have a \$2,000 Contributed Capital fee for new buyers. This money goes into their Facilities Modernization and Upkeep fund.
- They have two Recreation Centers - one was built approximately 30 years ago and the other one is approximately 15 years old. They just recently redid their fitness center which is now a very modern 1,100 SF facility that has two paid staff members.
- The monies used to build the new fitness center came from the Facilities Modernization and Upkeep fund. They also issued private notes at between 5 and 8% interest over a 5 year period. These notes were solicited from residents of Leisure World this program was administered by their attorney and Finance Department. They had so much interest

that they had to use a lottery system as private offerings are limited to a certain number of investors - otherwise it has to be publicly offered and they didn't want to do that. John Devner said if we were interested he could refer us to their attorney who has a lot of experience in these type offerings.

- They also have a real estate group and all profits from this group go into the Facilities Modernization and Upkeep fund. Use of this real estate group is not mandatory for owners interested in buying or selling properties in Leisure World.
- They only have a small snack bar on the golf course and do not have a restaurant or bar.
- The GM, John Devner, is President of the local chapter of the Community Association Institute. He also highly recommends that a couple board members join this group. They have monthly luncheon meetings with subject relevant speakers.

Sun Bird Golf Resort

- Started in 1988. 1,631 sites (350 - 400 manufactured homes, remainder are site built). Owners own their own lots and pay their own utilities. It is a gated community and their streets are private, not city streets. Their manufactured homes are selling for approx \$125K; their site built homes are 1,600 to 1,800 SF and are selling for approx \$360K. There is a \$500 impact fee for new buyers.
- There is an 18 hole golf course, 2 pools and 2 jacuzzis on site.
- 65% of their residents are year round, although 50% travel extensively in the summer. 35% are true snowbirds just coming for the season.
- Their HOA budget is approximately \$1.8M/year. Their association fees are \$720 a year (\$60/month) for two people. If more than two people live in the unit, they have to pay another \$360 a year or \$90/month. The fee covers use of all the facilities, road maintenance and street lighting, security, landscaping for public areas (38 acres), and custodial for public areas. Every 2 to 3 years they raise the homeowners fees, if needed. In 2005 they had a special assessment of \$20.
- The General Manager oversees 55 paid employees and works only for the HOA. The golf course is owned and run by owner/golfers.
- They have a paid Activity Director who reports to the General Manager. The Activity Director is responsible for concerts, bus trips, casino nights, tickets to Diamond Back and hockey games, theatre shows, dances once a week at their facility, etc.
- The HOA owns the clubhouse and rents the pro shop to the golf course. The HOA also owns the restaurant which serves breakfast and lunch, Thursdays they have a fish fry, and they have other special dinners and cater events at the facility.
- The General Manager acts as a mediator between the homeowners and the HOA. Their GM belongs to the Community Association Institute and has all the CAI certifications. He is also the Director of the local chapter.