



2024

DATAW ACADEMY:
ORGANIZATIONAL STRUCTURE &
STRATEGIC PLANNING
ON DATAW ISLAND

DIC Board of Directors

DIOA Board of Directors

General Manager

Asst. GM/Controller
Lori Murdaugh

ARB Administrator
Carol Garrison

Brian Hollingsworth
Golf Maintenance

Chris Fearn
Golf

Wells Morrison
Security

Warren Florence
Lawn & Racquet Sports

Laura Quail
Marketing & Comm.

Chad Langford
Marina

Corky Demers
HR/Accounting

Frank O'Hara
F&B

Dave Morrisette
IT

Kevin Ennis
Community Center

Staff Accountants

Holly Mason
Membership

Jack Aldrich
Building Maintenance

Greg Bowersox
Landscape Maintenance

Managers

Chef Dean Thomas
Executive Chef

Supervisors

Staff

EVERY BUSINESS NEEDS A MISSION
AND A VISION.

EVERY VISION NEEDS A STRATEGY
TO SUPPORT IT.

EVERY STRATEGY NEEDS TACTICAL
PLANS AND FUNDING MECHANISMS
TO MAKE IT HAPPEN.

DIC MISSION STATEMENT

The Dataw Island Club provides exceptional sports and dining amenities, along with social, artistic and recreational activities that enrich members' lives and create a sense of belonging that fosters a vibrant, caring and welcoming community.

DIC VISION STATEMENT

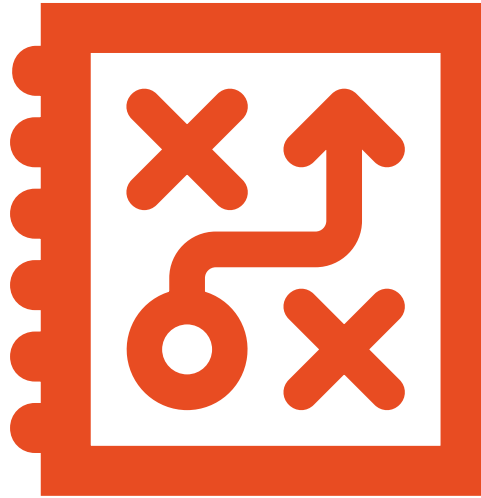
Dataw Island Club will remain attuned to the evolving needs of its members, administer premier facilities and services in a fiscally responsible manner, honor its island's rich heritage and natural environment, and promote policies and activities that respect and reflect the private club's diverse group of active individuals and families.

DIOA MISSION STATEMENT

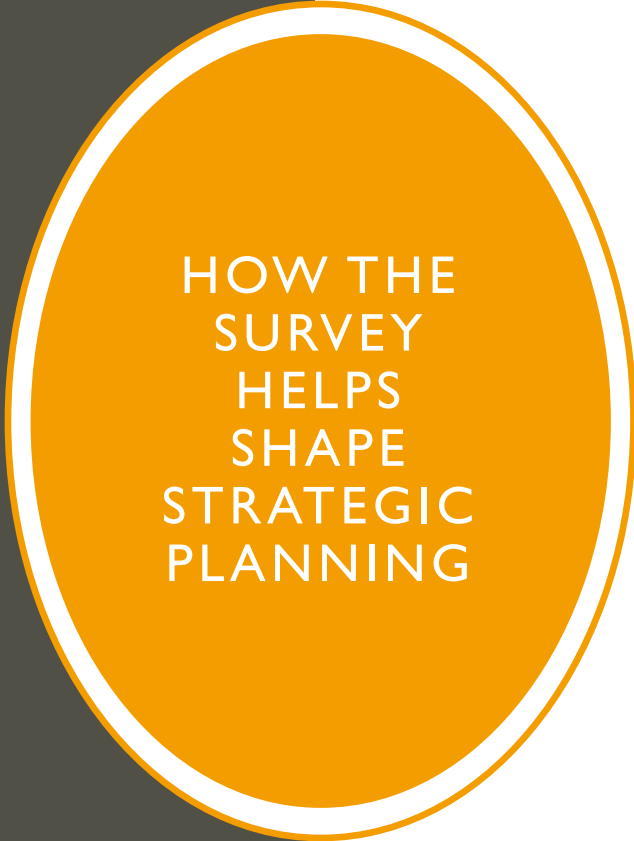
The Dataw Island Owners Association will maintain the common property and administer the enforcement of the governing documents to preserve and enhance the amenities and the natural beauty and harmony of Dataw Island. The Association will promote the safety, health and welfare of all who live and work at Dataw Island, promote the common benefit and enjoyment of the property and promote the financial welfare of the Association through planning and careful administration of Association funds.

DIOA VISION STATEMENT

Dataw Island will be an independent, financially secure and successful private country club community with exceptional amenities and activities and will be home to a diverse group of active individuals and families who have created a warm and welcoming environment.



THE SURVEY PROCESS: *HOW
IT SHAPES OUR STRATEGIC
PLANNING EFFORT*

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HOW THE SURVEY HELPS SHAPE STRATEGIC PLANNING

- A survey is essential to begin a strategic planning process. A Strategic Plan is the process of determining where an organization is going, how it will get there, and how it will know if it has succeeded.

FACILITIES MASTER PLAN IMPLEMENTATION OVERVIEW DIOA COMMITTEE STRUCTURE

Master Planning Process

- ❖ Wood+Partners (W+P) was retained in April 2022 to prepare a comprehensive Land Use Master Plan for Dataw Island
- ❖ The Master Planning Subcommittee solicited input from all stakeholders, separated into 9 geographical pods on the Island, and conveyed this input to W+P.
- ❖ W+P provided a first draft of the Plan in August, and after Committee review and input, delivered the Final plan in October.

Plan Presentation to Community

- ❖ In October, the Committee and W+P presented the Final Plan to nearly 500 residents in the Carolina Ballroom.
- ❖ The presentation was video-taped and viewed by almost 200 residents after the event.

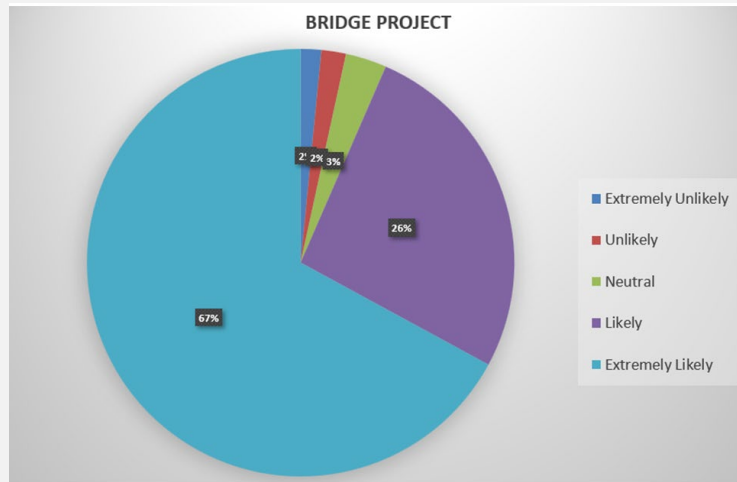
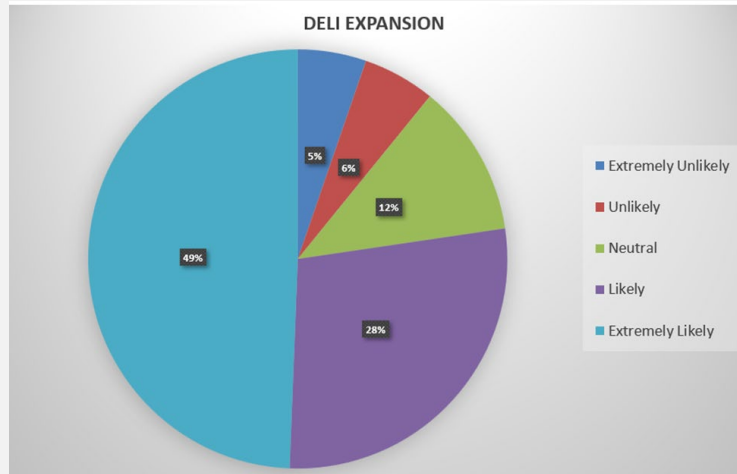
Resident Survey

- ❖ Following the Master Plan presentation, a community-wide survey was conducted to receive resident input on priorities for 10 Aspirational Amenities.
- ❖ Over 350 residents participated in the survey, and provided valuable comments for consideration.
- ❖ The Amenities receiving the highest vote total (most important in priority) were:
 - ❖ Morgan River Waterfront - #1
 - ❖ Additional Dining Opportunities - #2
 - ❖ Fitness Center/Workout Areas - #3
- ❖ Greenspace Beautification/Tree Plant-Back - #4

Focus Groups & Town Halls

- ❖ In 2023, we held 9 Focus Groups and 3 Town Halls to garner additional feedback.

MASTER PLANNING PROCESS UPDATE: 2023



LAST FALL: Focus Groups –
300 members

*Exit Surveys showed
significant support for only
the Deli and Bridge projects
at this time*

Town Halls – 600
members

Exit Survey Results
below, from Town Halls

MASTER PLANNING UPDATE 2024

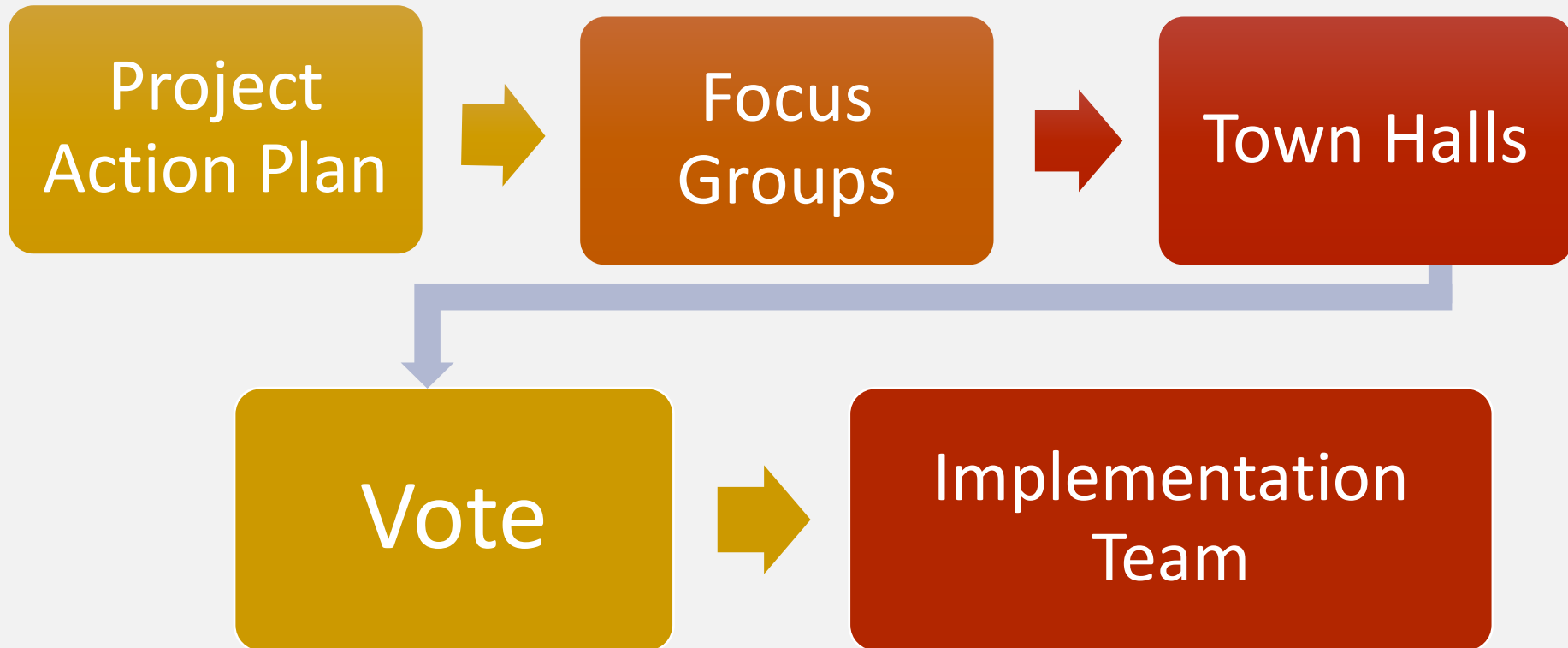
- Engaged a Master Planning specialist
- Bridge Committee work continues

COMING UP:

Focus Groups
& Exit Survey

Town Hall &
Exit Surveys

THE DATAW WAY: PROJECT PLANNING



Dataw Island Resident Survey

Survey Administration

Launched: Nov. 28

Closed: Dec. 13

Survey Population: 1635 Residents

Resident/Member Participation:

1,150 Residents

Completion Percentage: 70%

(average is 50%)

Memberships: 988

Membership Participation: 755

Membership Representation: 76%



The Member Survey is the cornerstone of the strategic planning process because it helps uncover member expectations, how they define value and highlights their tolerances.

NET PROMOTER SCORE

• What is Net Promoter Score (NPS)?

• Answers the question, “On a scale of 0 (lowest) to 10 (highest), how likely are you to recommend Dataw Island to family and friends?”.

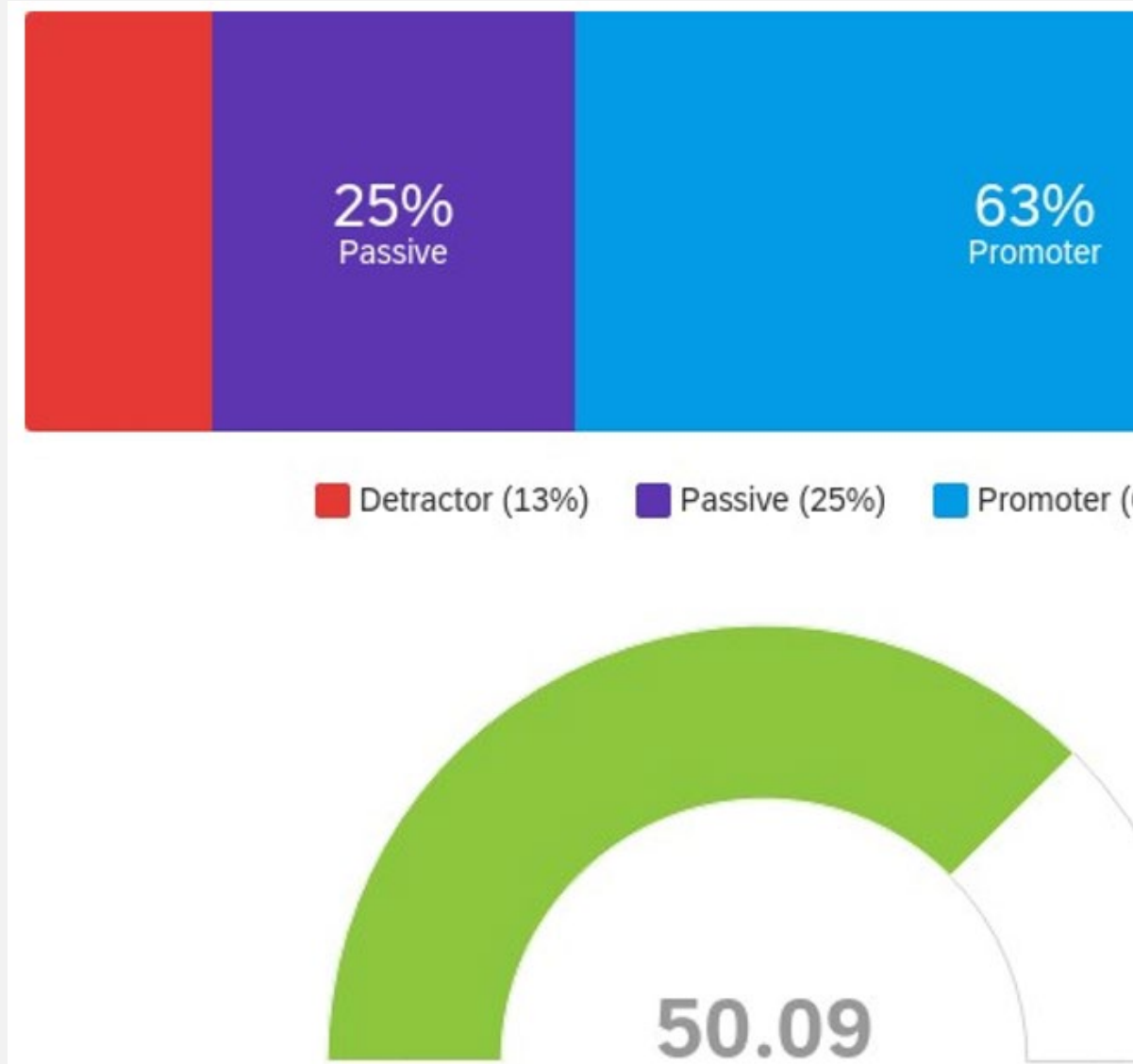
• The “Net” score takes those who recommend DI (promoters) less those who would not recommend DI (detractors). A third group of responses (passives) were neutral or non-committal on this question

• 63% of respondents were 'promoters' of Dataw Island

• 13% of respondents were detractors' of Dataw Island

• 25% of respondents were 'passive' toward Dataw Island

• ***Dataw Island's NPR measured 50 (63-13) vs. an industry average of 41.***



Importance vs Satisfaction Analysis

The Importance Satisfaction Analysis helps indicate areas of focus. The top left quadrant (Q1) represents areas of high importance and lower satisfaction which isolates the areas that should take priority. Based on the average, each question was positioned in one of the four areas:

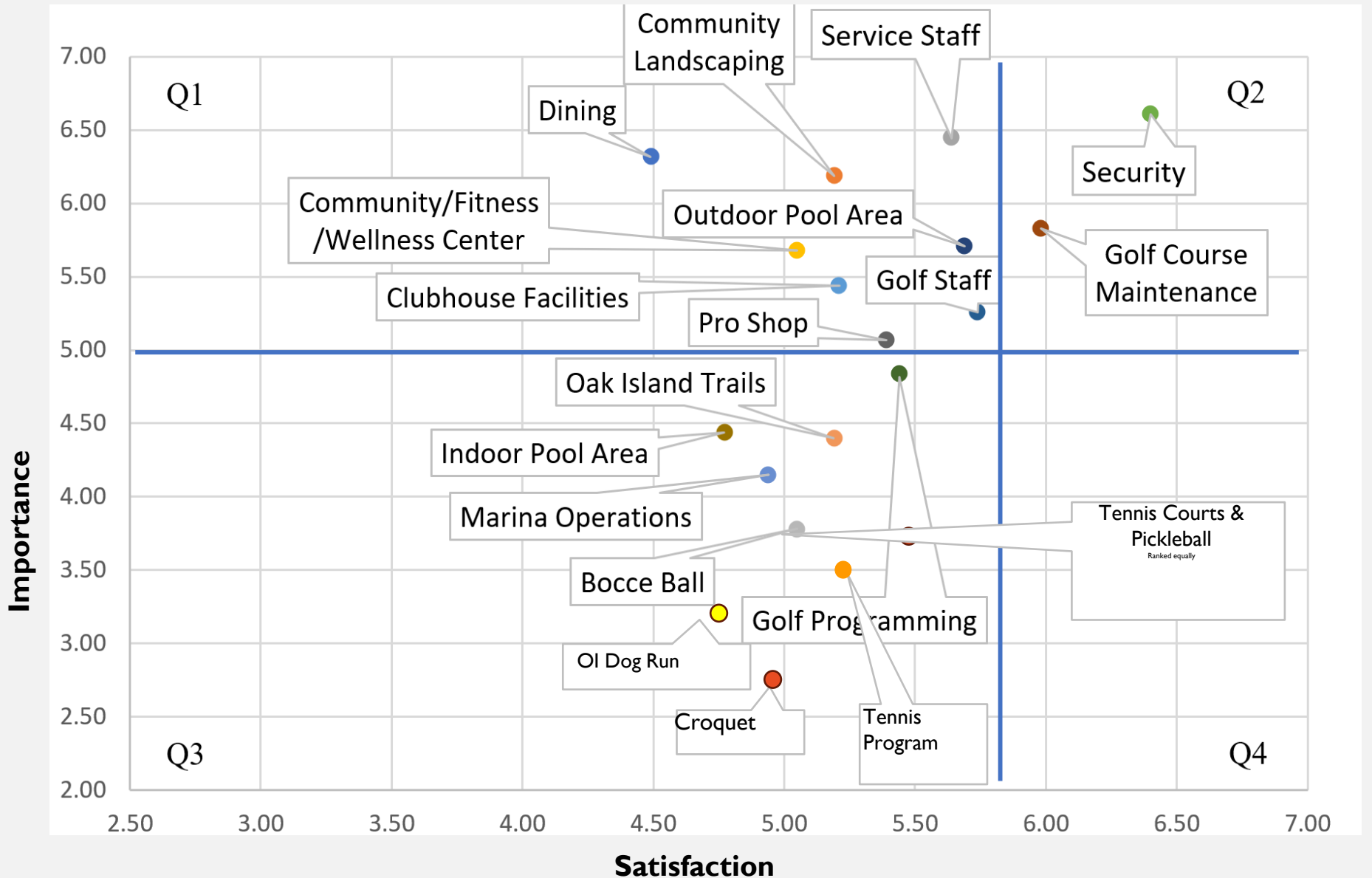
QUADRANT 1 - CONCENTRATE HERE: HIGH IMPORTANCE BUT LOW SATISFACTION

QUADRANT 2 - KEEP UP THE GOOD WORK: HIGH IMPORTANCE AND HIGH SATISFACTION

QUADRANT 3 - LOW PRIORITY: LOW IMPORTANCE AND LOW SATISFACTION

QUADRANT 4 — EVALUATE RESOURCE ALLOCATION: LOW IMPORTANCE BUT HIGH SATISFACTION

SATISFACTION MATRIX



SURVEY RESULTS: 2023

QUADRANT 1 - CONCENTRATE HERE: HIGH IMPORTANCE BUT LOW SATISFACTION

- Service Staff, Community Landscaping, Dining, Outdoor Pool Area, Community/Fitness/Wellness Center, Clubhouse Facilities, Pro Shop, Golf Staff

QUADRANT 2 - KEEP UP THE GOOD WORK: HIGH IMPORTANCE AND HIGH SATISFACTION

- Security, Golf Course Maintenance

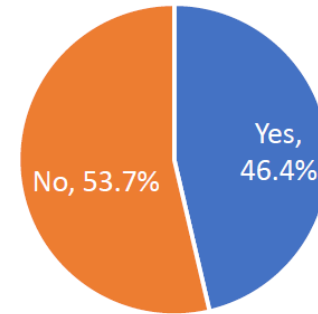
QUADRANT 3 – AREA OF OPPORTUNITY: LOW IMPORTANCE AND LOW SATISFACTION

- Golf Programming, Oak Island Trails, Indoor Pool Area, Marina Operations, Bocce Ball, Golf Programming, Croquet, Oak Island Dog Run, Tennis Program

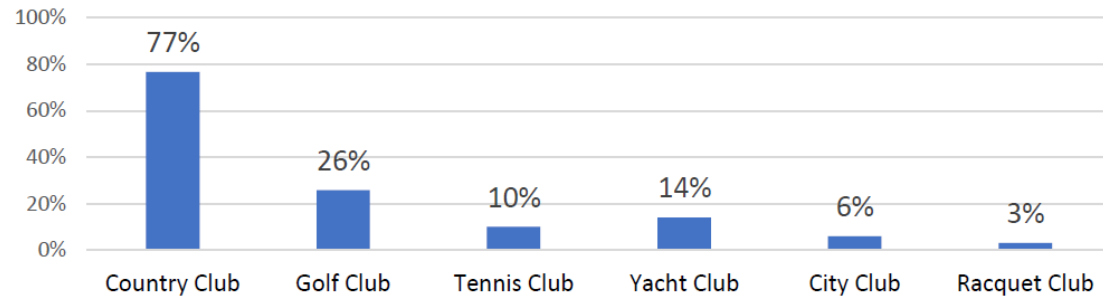
QUADRANT 4 – EVALUATE RESOURCE ALLOCATION: LOW IMPORTANCE BUT HIGH SATISFACTION

PRIOR CLUB MEMBERSHIP

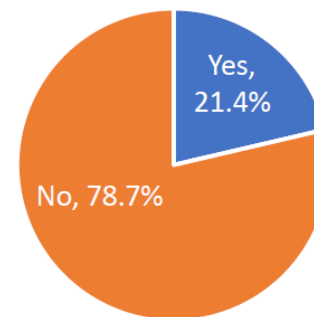
Did you belong to a Club before you came to Dataw?



If yes, what type of Club(s)?

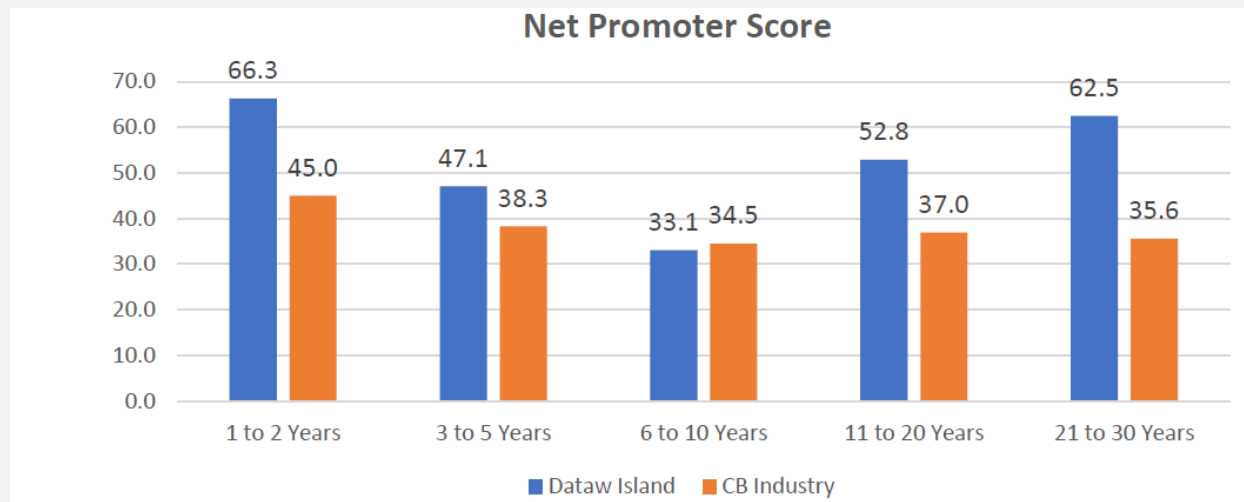
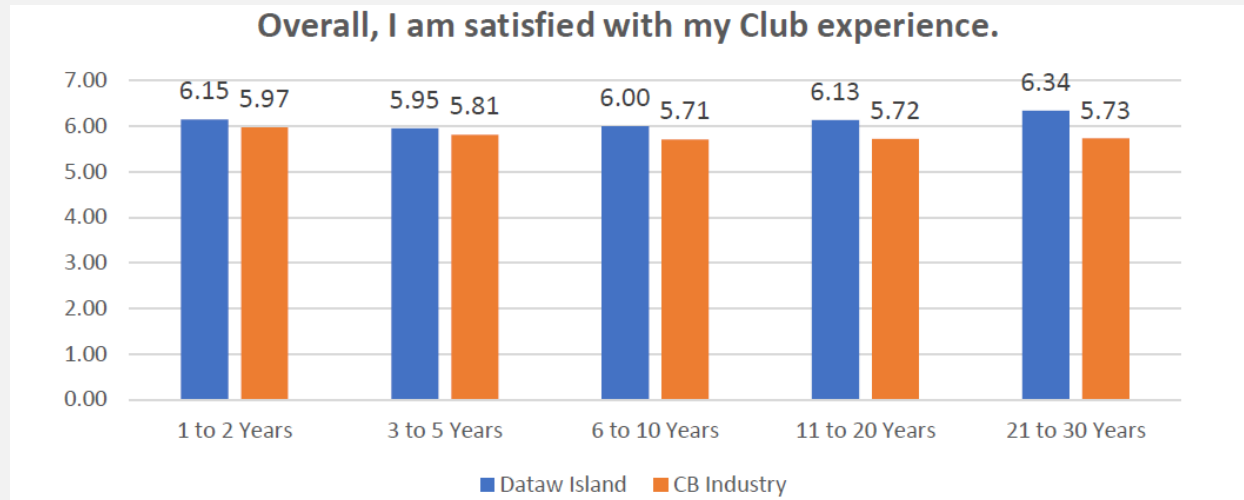


Prior to moving to Dataw, have you lived in a private, gated community?



OVERALL SATISFACTION

- “Overall, am I satisfied with my experiences at Dataw Island?”
- Dataw Island's score was 6.08 on a 1 to 7 scale (Industry average is 5.79)
- 93.2% are satisfied



F&B

Overall Satisfaction with the food & beverage service variables with Fine Dining:

Field	Industry Benchmark	Club Average	Delta	Club % Dissatisfied	Club % Satisfied
Prices	5.20	5.01	(0.19)	17.9%	65.9%
Staff - friendly and welcoming	6.46	6.32	(0.14)	2.1%	89.8%
Staff professionalism & training	5.99	5.76	(0.23)	8.3%	83.2%
Consistency in product	5.55	4.92	(0.63)	22.0%	64.8%
Quality	5.55	5.04	(0.51)	19.5%	68.1%
Portion Size	n/a	5.56	-	9.0%	76.8%
Availability	n/a	4.88	-	19.8%	62.8%
Speed of service	5.56	5.53	(0.03)	8.3%	78.2%
Menu Variety	5.09	4.62	(0.47)	27.1%	59.2%
Wine Offerings	5.65	5.24	(0.41)	11.0%	68.8%
Facility cleanliness	n/a	5.81	-	7.0%	83.3%
Ambiance	5.53	5.53	0.00	10.8%	79.0%
Appearance/ Condition	n/a	5.62	-	9.7%	81.3%
Ability to find a parking place	n/a	5.58	-	7.9%	78.5%
Reservation system	n/a	5.01	-	17.6%	64.7%

F & B

Overall Satisfaction with the food & beverage service variables with Cotton Dike Deli:

Field	Industry Benchmark	Club Average	Delta	Club % Dissatisfied	Club % Satisfied
Prices	5.20	5.78	0.58	4.2%	83.0%
Staff - friendly and welcoming	6.60	6.13	(0.47)	3.8%	86.7%
Staff professionalism & training	5.99	5.98	(0.01)	3.4%	84.8%
Facility cleanliness	n/a	5.92	-	2.0%	82.5%
Consistency in product	5.55	5.90	0.35	3.4%	86.1%
Quality	5.55	5.86	0.31	4.4%	86.0%
Quantity	n/a	5.92	-	3.0%	85.7%
Speed of service	5.56	5.41	(0.15)	12.0%	77.5%
Menu Variety	5.09	5.26	0.17	11.8%	74.7%
Appearance/ Condition	n/a	5.61	-	6.0%	80.3%

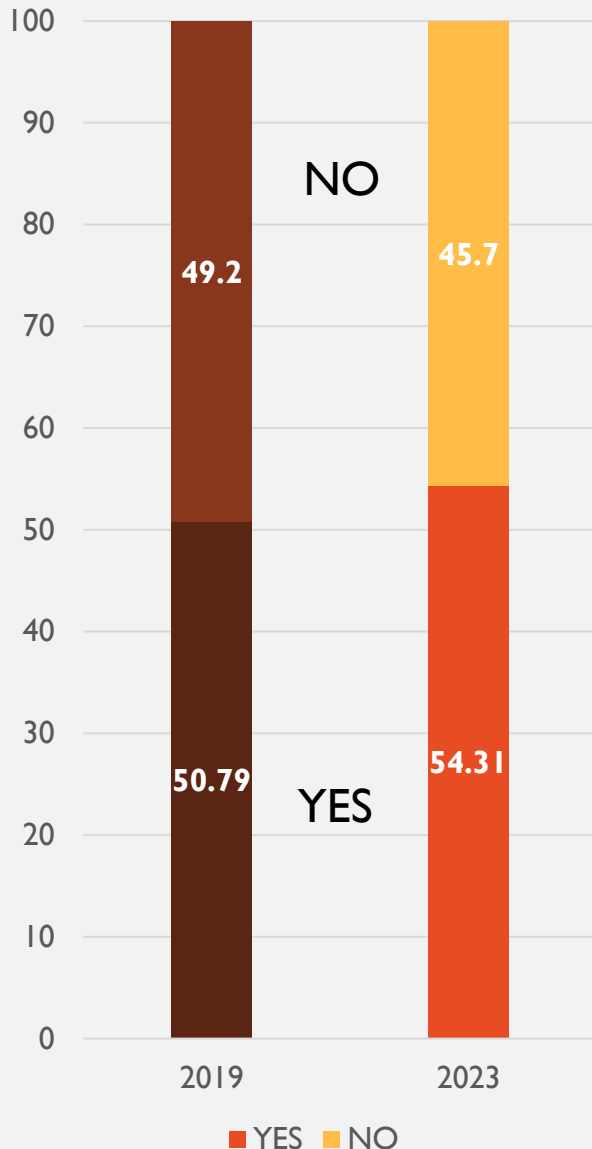
F&B

Overall Satisfaction with the food & beverage service variables with The Pub:

Field	Industry Benchmark	Club Average	Delta	Club % Dissatisfied	Club % Satisfied
Prices	5.20	5.01	(0.19)	20.9%	68.3%
Staff - friendly and welcoming	6.46	6.47	0.01	2.2%	95.6%
Staff professionalism & training	5.99	5.72	(0.27)	9.7%	85.3%
Consistency in product	5.55	4.74	(0.81)	28.2%	64.2%
Quality	5.55	4.96	(0.59)	22.7%	69.7%
Quantity	n/a	5.62	-	8.3%	80.1%
Speed of service	5.56	5.57	0.01	9.0%	82.5%
Menu Variety	5.09	4.55	(0.54)	31.2%	60.9%
Wine offerings	5.65	5.40	(0.25)	11.6%	73.5%
Facility cleanliness	n/a	5.73	-	8.8%	84.7%
Ambiance	5.53	5.33	(0.20)	15.0%	75.6%
Appearance/ condition	n/a	5.48	-	12.9%	79.8%
Ability to find a parking place	n/a	5.64	-	7.5%	79.3%
Beer offerings	5.79	5.44	(0.35)	8.8%	72.9%
Value	n/a	5.00	-	20.6%	69.0%
Accommodations to dietary restrictions	n/a	5.30	-	9.9%	66.7%

GOLF


Are you a golfer?



Please rate your level of satisfaction with the following elements of the Golf Courses:

HIGHEST TO LOWEST SATISFACTION:

- 6.63 Cart paths
- 6.45 Cotton Dike greens
- 6.41 Cotton Dike fairways
- 6.37 Morgan River greens and MR fairways
- 6.31 Cotton Dike tees
- 6.29 Morgan River tees
- 6.27 Practice green
- 6.2 Front driving range
- 6.18 Foretees res. system
- 6.17 Chipping green
- 6.02 Back range
- 6.02 Restroom CD 14/15
- 6.05 Restroom CD 3
- 5.98 Restroom MR 6
- 5.99 Restroom Malilly MR10
- 5.97 Ice machines
- 5.88 Cotton Dike bunkers
- 5.87 Morgan River bunkers
- 5.77 Tee time availability
- 5.6 Pace of play

A large orange oval with a white border, containing the text 'KEY SURVEY TAKE-AWAYS'.

KEY SURVEY TAKE- AWAYS

- Longer equals happier
- 93% satisfied or better
- Top opportunities:
 - Dining
 - Service Staff
 - Outdoor Pool
 - Landscaping
 - Community/Wellness/Fitness Center

Club Industry Definitions and Distinctions

- **Strategic Planning – Analyzing the club and its environment today in order to create a formal program for guiding its development and success tomorrow.**
- **Long-Range Planning (Master Planning) – Identifying the overall facilities roadmap and financial model for the maintenance and enhancement of a club's facilities.**

MAJOR PARTS OF A STRATEGIC PLAN

1. Mission, Vision, Aspirations
2. Core Values
3. SWOT
4. Strategic Goals (*Boards, Committees*), Tactical Plans and SMART goals (*Staff*)
5. Measurement (*PDCA*), funding mechanisms

Core Values

- ❖ Friendly/Sociability/Welcoming/ Mutual Respect/ Inclusive/ Diversity
- ❖ Fiscal Responsibility/Transparency
- ❖ Integrity
- ❖ Quality
- ❖ Value/Affordability
- ❖ Leadership
- ❖ Continuous Improvement
- ❖ Environmentally Responsible

Measures of Success

- ❖ Financial Strength/Accountability
- ❖ Member Satisfaction - measured through surveys/feedback
- ❖ Membership Growth/Retention
- ❖ Facility Improvements
- ❖ Members and Guest Participation
- ❖ Staff Satisfaction/Retention - measured through surveys/feedback
- ❖ Property Values

2024 SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats



SWOT – Strengths, Weaknesses, Opportunities, and Threats.

- **Strengths** - Strengths are the qualities that enable us to accomplish the organization's mission. These are the basis on which continued success can be made and continued/sustained.
- **Weaknesses** - Weaknesses are the qualities that prevent us from accomplishing our mission and achieving our full potential. These weaknesses deteriorate influences on the organizational success and growth. Weaknesses are the factors which do not meet the standards we feel they should meet.



SWOT
ANALYSIS

SWOT – Strengths, Weaknesses, Opportunities, and Threats.

- **Opportunities** - Opportunities are presented by the environment within which our organization operates. These arise when an organization can take benefit of conditions in its environment to plan and execute strategies that enable it to become more profitable. Organizations can gain competitive advantage by making use of opportunities.
- **Threats** - Threats arise when conditions in external environment jeopardize the reliability and profitability of the organization's business. They compound the vulnerability when they relate to the weaknesses. Threats are uncontrollable. When a threat comes, the stability and survival can be at stake. Examples of threats are - unrest among employees; ever changing technology; increasing competition leading to excess capacity, price wars and reducing industry profits; etc.



SWOT ANALYSIS



2024 SWOT

Top Strengths

- ❖ Operational budget process & performance
- ❖ Friendly membership
- ❖ Management Performance
- ❖ Security
- ❖ Amenities
- ❖ Golf Courses and Maintenance
- ❖ Member owned and governed
- ❖ High quality leadership
- ❖ Financial stability
- ❖ Our residents
- ❖ Partnership with community services i.e. fire station
- ❖ On-site physical therapy
- ❖ Volunteerism
- ❖ Full-service marina
- ❖ Clubs within Clubs
- ❖ Representative governance by member elections
- ❖ Strategic planning
- ❖ Member led amenity programming
- ❖ Natural beauty
- ❖ Price point of homes and amenities
- ❖ Highly competitive initiation fees, dues, home prices
- ❖ Relationship between two Boards



2024 SWOT

Top Weaknesses

- ❖ Resistance to change
- ❖ Landlocked with no room for expansion of homesites or amenities
- ❖ Staff turnover
- ❖ Staffing Shortages
- ❖ Loss of habitat
- ❖ Number of delinquencies
- ❖ Insufficient staff facilities
- ❖ Election process – volunteers not elected
- ❖ Demographic challenges
- ❖ Dining quality, consistency
- ❖ Common area beds
- ❖ Lack of meeting spaces
- ❖ Community center too small
- ❖ Perceived credibility of Boards
- ❖ Belief that internet chatter can affect Board actions



2024 SWOT

Top Opportunities

- ❖ Improve/expand marina operations & facilities
- ❖ Meeting various generational needs
- ❖ Promoting Dataw in the Beaufort community
- ❖ Ability of people to work from home
- ❖ New development in the area may increase membership
- ❖ With buildout approaching, we can reimagine campus



2024 SWOT

Top Threats

- ❖ Limited labor force
- ❖ Natural disasters
- ❖ Quality of public school system
- ❖ Supply chain
- ❖ Safe Harbor's increasing presence in boating community
- ❖ Economic conditions
- ❖ Pandemics
- ❖ Sea level rise
- ❖ Construction cost trends
- ❖ Water/irrigation issues
- ❖ Rising interest rates

COMMITTEE/ STAFF GOAL SETTING PROCESS

BROAD, STRATEGIC GOALS TO TACTICAL GOALS

SWOT leads to High Level Strategic Goals

Committees offer big picture goal ideas

Board reviews

Tactical goals support the overall strategy

Staff develops SMART goals

Overall strategy is to address the SWOT

**DIC/DIOA 2024
STRATEGIC
GOALS
("OBJECTIVES")
THROUGH THE
SWOT PROCESS,
THE BOARDS AND
MANAGEMENT
IDENTIFIED THE
KEY STRATEGIC
ISSUES FACING
DATAW ISLAND
CLUB AND
DATAW ISLAND
OWNERS'
ASSOCIATION.
THE TOP ISSUES
ARE LISTED AS
FOLLOWS:**

- Recruit and retain quality staff members
- Pursue increased membership satisfaction
 - With operations in areas identified as needing attention in the survey
 - By pursuing innovations and ideas
 - By providing value
- Embrace a sense of community goodwill and mutual respect and cooperation among all community, club and staff members
- Identify and implement natural beauty initiatives
- Continue work and determine support levels for masterplan initiatives:
 - Further consider an enhanced waterfront presence and quality wet slip, dry stack operation
 - Identify the preferred long-term solution for replacing the entrance bridge, the capital costs, financing method and overall project timeline
 - Identify a preferred long-term solution(s) for a source of reliable irrigation water
 - Further explore the fitness, wellness and meeting space needs of the community
 - Further explore and implement additional dining options as directed by the membership vote

DIC 2024 CHALLENGES & ISSUES

- Dining – our facilities are age constrained, put plans in place to move up renovation of kitchen & Clubhouse.
 - Support management with efforts to hire new Chef
 - Support Deli Project when it passes, plans, contractor etc
 - Relaunch addressing dining options if Deli does not pass
 - Address golfers impacting Dining at Pub, time to move forward the screening area outside Fine dining?
- CC – with the new building off the table for now, the building does need a refresh
- Financial Insights for our island (think of series Finance for Dummies)
 - Offer quarterly open sessions for members.
 - Sessions could range from costs of golf and Pub finances as examples.
- #1 most wanted amenity in Master Plan was enhancements to marina area (Morgan River Landing), while this is clearly DIOA, the DIC Board should be in lock step and assist where possible. (One Island Concept)
- Continue working with BJSWA to increase the amount of effluent for our island.
- Create an island wide calendar, for the island and the Board.
- Support the new NomCom process.
- How can we better utilize the Sales Center?
- Strive for more efficient Committee meetings, leverage Roberts Rules, provide training as needed for DIC Committee Chairs.

DIOA 2024 CHALLENGES & ISSUES

- Complete the assessment of our options for the bridge design and financing. Create a presentation to convey this to the residents for a vote either in mid 2024 or early 2025.
 - Continue to assess our irrigation needs and resources.
 - Continue to work on our plans for the marina refurbishment and expansion project. Formulate a presentation for the community after the bridge issues are decided.
 - Continue to work on the plan for the Morgan River Landing.
- Review and digest the survey results and formulate a plan to address recurring themes that our members are concerned with.
- Continue to have a commitment to transparency in all aspects of work on the board.

SMART GOALS



Specific



Measurable



Achievable



Relevant



Time Bound

2024 SMART Goals

(Sample Section)

Department	Goal	Target Date	Process Owner	Progress	Comp. Date
Food and Beverage	Make FOH service training a priority, having all staff attend at least 2 training sessions on proper service procedures and etiquette, highlighting the tactics we worked on with RCS Hospitality Group.	8/31/2024	Frank O'Hara		
Food and Beverage	To support the goal for improving member satisfaction with F&B offerings, develop a new menu concept that improves the variety of food offerings in the eyes of the membership	10/31/2024	Frank O'Hara/Exec Chef		
Food and Beverage	To address the decline in ratings for consistency and quality in food offerings, implement standardized recipes for all menu items, soups and sauces to promote consistency of products. Hold training sessions for demonstrating preparation techniques and recipe compliance concurrent with each new menu release.	5/31/2024	Frank O'Hara/Exec Chef		
Food and Beverage	To address the decreased ratings for the Deli speed of service, create realistic service time standards, techniques and menu options that will allow for quicker meal delivery.	6/30/2024	Frank O'Hara/Exec Chef		
Food and Beverage	Create a new wine list format and procure products to increase member satisfaction with wine offerings. Develop an understood rotation for any BTG wines offered while maintaining quality and freshness.	7/31/2024	Frank O'Hara		
Food and Beverage	Using the same survey logic and format from the November 2023 comprehensive member survey, retest specifically for improvement in the areas of Pub and Fine Dining quality, consistency, variety, value/pricing, staff professionalism and training and wine offerings.	10/31/2024	Frank O'Hara		
Food and Beverage	As a member education and PR opportunity, offer a quality cooking class for members, with food and wine pairings. The goal is to offer membership a unique opportunity and to promote the capabilities of F&B and build member confidence in the team.	8/31/2024	Frank O'Hara/Exec Chef		
Food and Beverage	The survey showed that presently 78.8% of members would support a clubhouse kitchen renovation and 68.8% would support other general clubhouse renovations (HVAC, electric etc.) These were the most supported projects listed. Begin the process of a conceptual clubhouse dining program, reimagining both dining spaces and service areas, including the kitchen. Deliverables include a white paper, identification of potential architecture, engineering, construction and design partners, concept sketches or renderings as appropriate and a list of pros and cons for the work.	year end	Frank O'Hara/Exec Chef		

2024 SMART Goals Examples

- To **address the decline in ratings for consistency and quality in food offerings**, implement standardized recipes for all menu items, soups and sauces to promote consistency of products. Hold training sessions for demonstrating preparation techniques and recipe compliance concurrent with each new menu release.
- To address the **decreased ratings for the Deli speed of service**, create realistic service time standards, techniques and menu options that will allow for quicker meal delivery.
- Create a **new wine list** format and procure products to increase member satisfaction with wine offerings. Develop an understood rotation for any BTG wines offered while maintaining quality and freshness.
- Using the same **survey logic** and format from the November 2023 comprehensive member survey, retest specifically for improvement in the areas of Pub and Fine Dining quality, consistency, variety, value/pricing, staff professionalism and training and wine offerings.
- As a member education and PR opportunity, offer a quality **cooking class for members**, with food and wine pairings. The goal is to offer membership a unique opportunity and to promote the capabilities of F&B and build member confidence in the team.

MEMBER PARTICIPATION, FEEDBACK & INPUT

Surveys/Comment Cards
Focus Groups/Town Halls
Committees
Boards