



*Sandestin*  
OWNERS ASSOCIATION, INC

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# ADVISORY BOARD MEETING

## FEBRUARY 24, 2023

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**Please silence your cell phone.**

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**This presentation will be available for review  
on the SOA website following the meeting.**

# OPERATIONS UPDATE

Tom Cooper

Executive Director

[tcooper@soaowners.com](mailto:tcooper@soaowners.com)



## 2023 COMMITTEE STRUCTURE AND CHAIRS

Approved by the SOA Board of Directors 1/26/2023

**Class A Nominating**  
*Cindy Jefcoat*

**Class B Nominating**  
*Robert Kamm*

*Meet As Required*

**Safety & Security**  
*Gregg Pierce*

*(\*Melissa Cocks)*

*Meet Every Other Month*

**Finance**

*Jeff Murrell*

*Meet Monthly*

**ARB**

*K Losson*

*Meet Semi-monthly*

**Communications**

*Cindy Jefcoat*

*(\*Melissa Cocks)*

*Meet As Needed*

**Grievance**

*Ken Lloyd*

*Meet As Needed*

**Maintenance**

*Terry Cost*

*Every Other Month*

**Human Resources**

*Graham Russell*

*Meet As Needed*

**SOA Governance**

*Jeff Kelley*

*Meet As Needed*

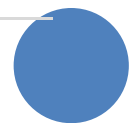
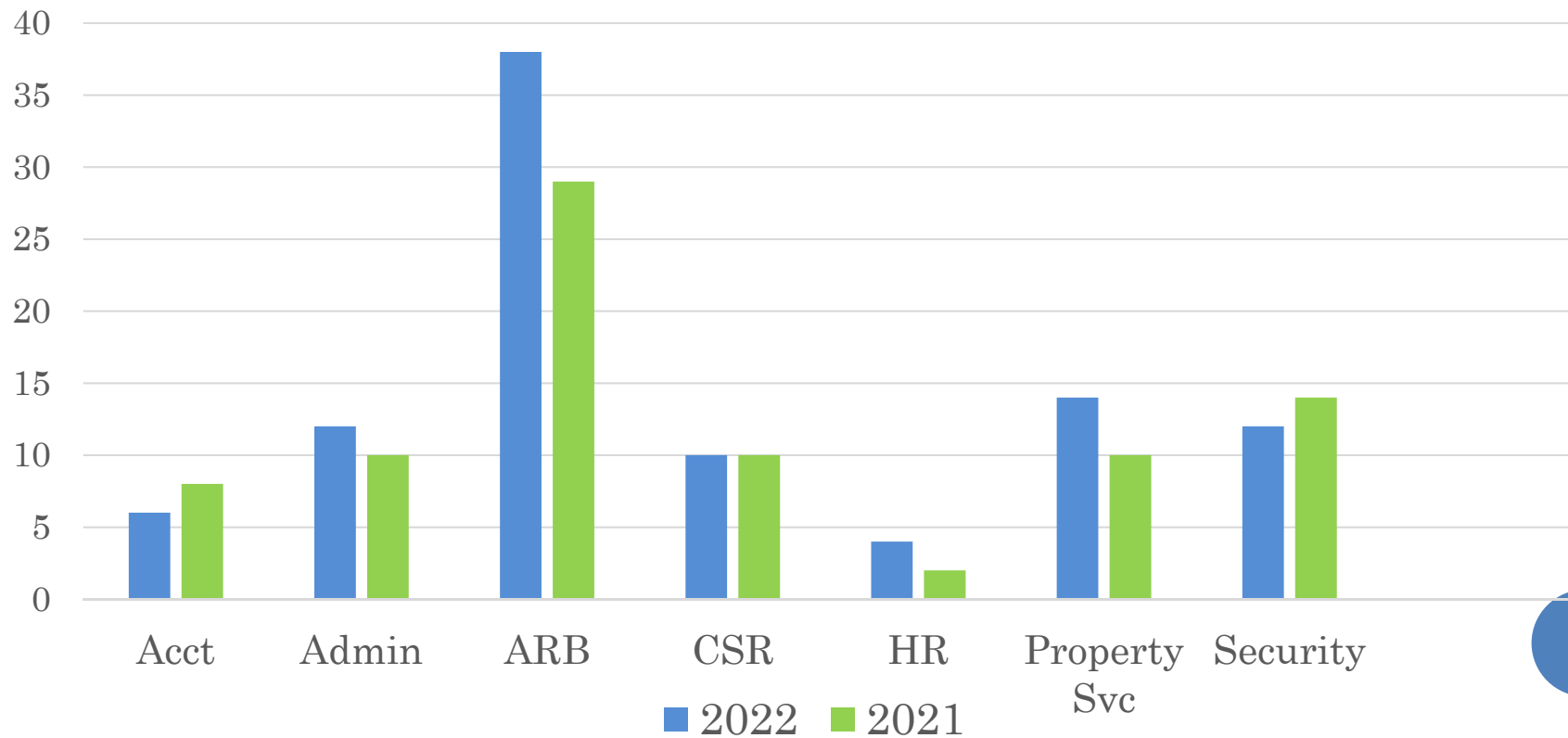
\* As Needed / Substitute / Backup

## 2022 STRATEGIC PLAN MEASURABLES

Focus Area	Measurable	Target	Score
Governance	Non Compliance	0	17
Governance	Plan Actions completed on time	>80%	100%
Staff	Employee Retention	>70%	75%
Staff	Employee Satisfaction	>75%	0%
Staff	Performance Reviews completed on time	100%	100%
Owners	Owner Satisfaction	>75%	90%
Owners	Net Promoter Score	>50%	67%
Communications	Website Visits up over 2021	10%	5%
Communications	Facebook Followers up over 2021	10%	100%
Communications	Social Media posts per month	10	10.75
Operations	Work orders closed on time	>50%	100%
Operations	BOD approved projects complete on time	>90%	83%
Finance	Revenue and expense within budget	Yes	Yes
Finance	Board approved projects completed within budget	>90%	94%
Finance	Reserve Funding Balance Positive for 10 years	Yes	Yes

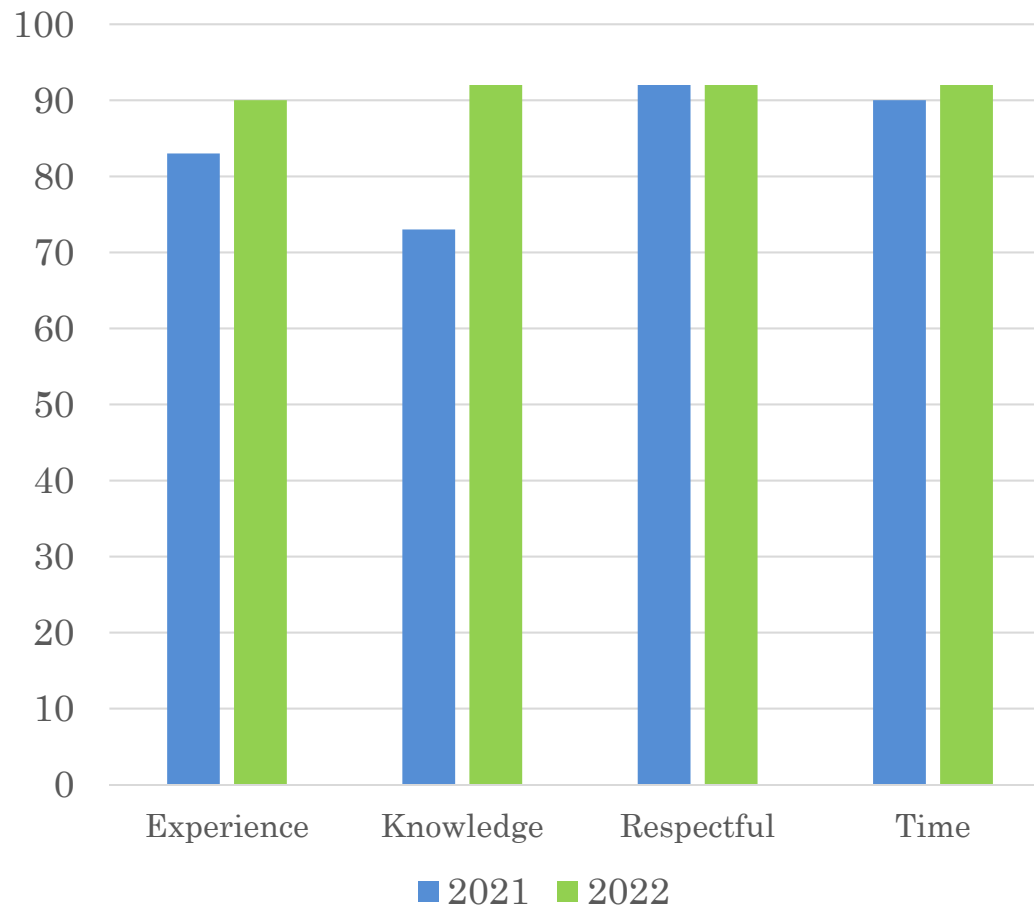
# DEPARTMENT INTERACTION

- **Issues completely resolved:**
- **80% - 2021- > 90% - 2022**
- **Chart represents the survey answers based on SOA department interactions.**



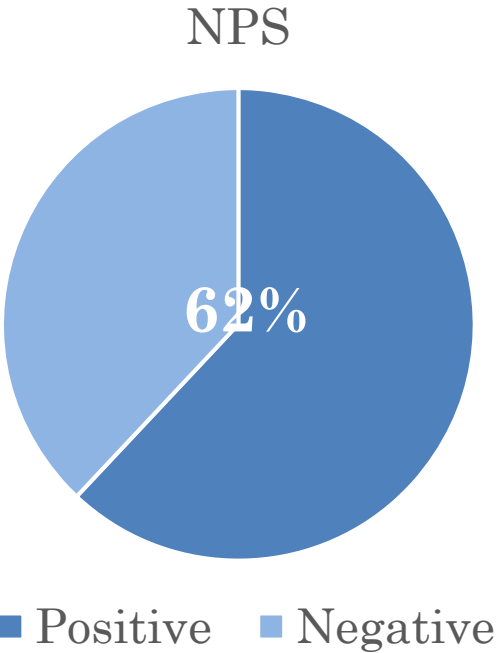
## INTERACTION WITH SOA STAFF 2021 COMPARED WITH 2022

- **Improved Experience 90%**
- **Improved staff knowledge -92%.**
- **92% felt respected** by the SOA staff both years.
- **92% stated the experience took equal or less time** than expected.

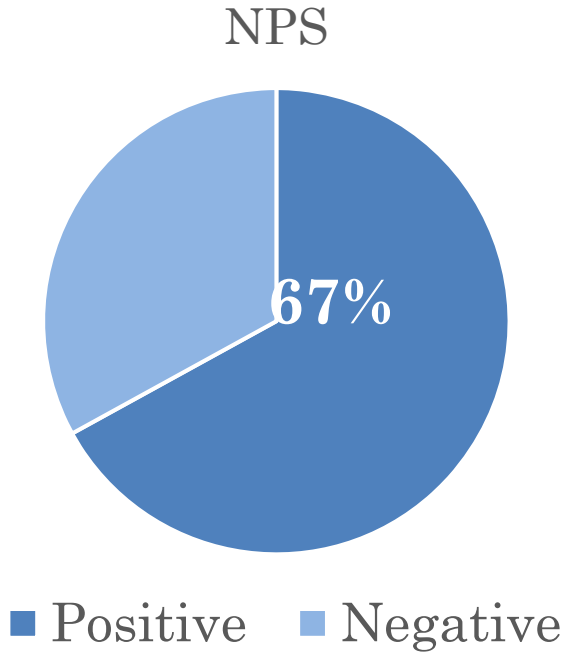


# OVERALL RESULTS

## 2021 Results



## 2022 Results



# 2023 STRATEGIC PLAN AND CUSTOMER SATISFACTION SURVEY 2023

The 2023 approved Strategic and Action Plan is available under the Homeowner Menu of the SOA website.

Please complete the 2023 Customer Satisfaction Survey.

The link is available at the bottom of all SOA email correspondence and the QR code displayed at the front desk.

**HOW ARE WE DOING?**



Please scan this QR code and take  
our brief  
Customer Satisfaction Survey



# WASTE MANAGEMENT OVERAGES



# EXTRA CHARGES

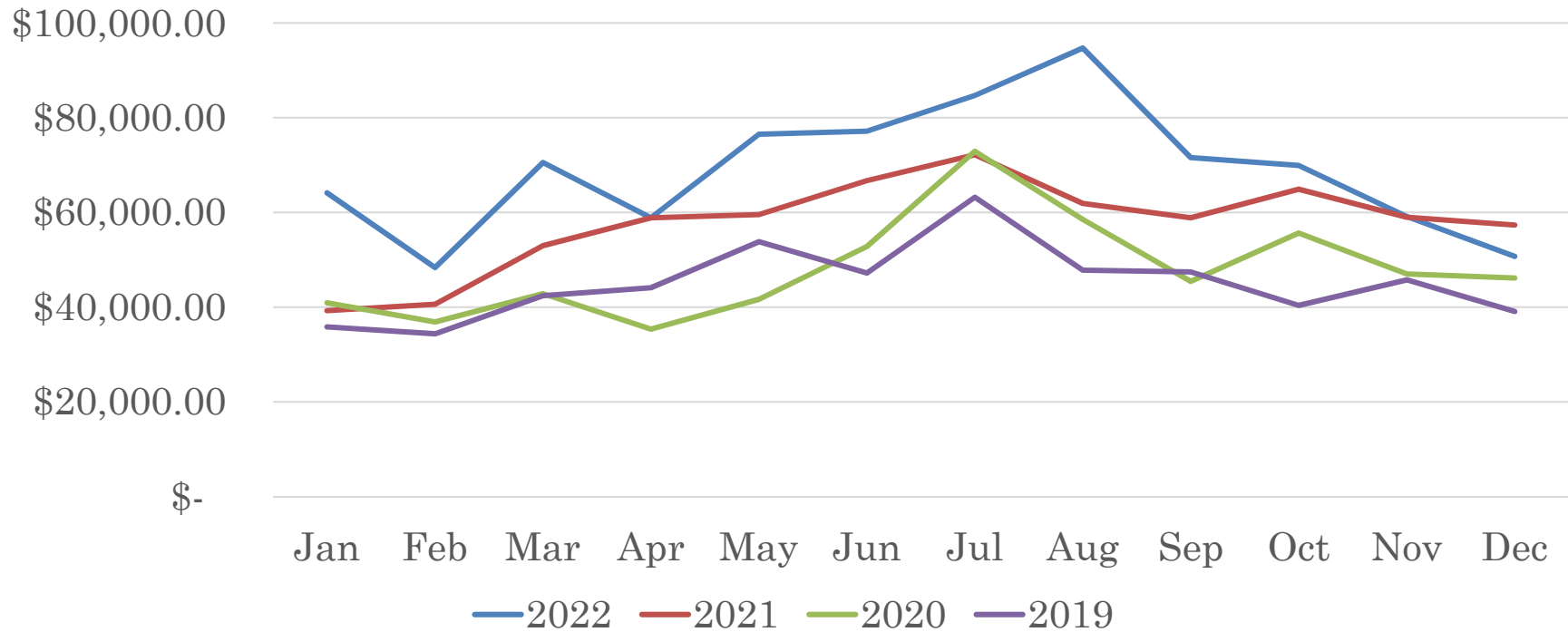
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- Tonnage Exceeding County Reimbursement
- Trip Charges
- Fuel Charges
- Gate Charges
- Environmental Charges



# WASTE MANAGEMENT YOY COSTS

Waste Management Monthly Expenses



2019	\$533,367	2021	\$723,235
2020	\$672,624	2022	\$793,572
		Est 2023	\$854,610



# THINGS BEYOND SOA CONTROL

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- SOA cannot dictate Waste Management pickup times.
- Waste Management personnel cannot put trash that has been placed outside of dumpster into the dumpster.
- Waste Management personnel cannot manually move dumpsters in and out of trash garages/rooms.
- Waste Management cannot provide Sunday trash pick-up.



# HOW TO KEEP YOUR COST DOWN

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- Evaluate your trash needs based on occupancy and seasonal needs
- Monitor usage
- Dumpsters can be varied based on collection days, number of dumpsters, size of dumpster
- Protect from illegal dumping



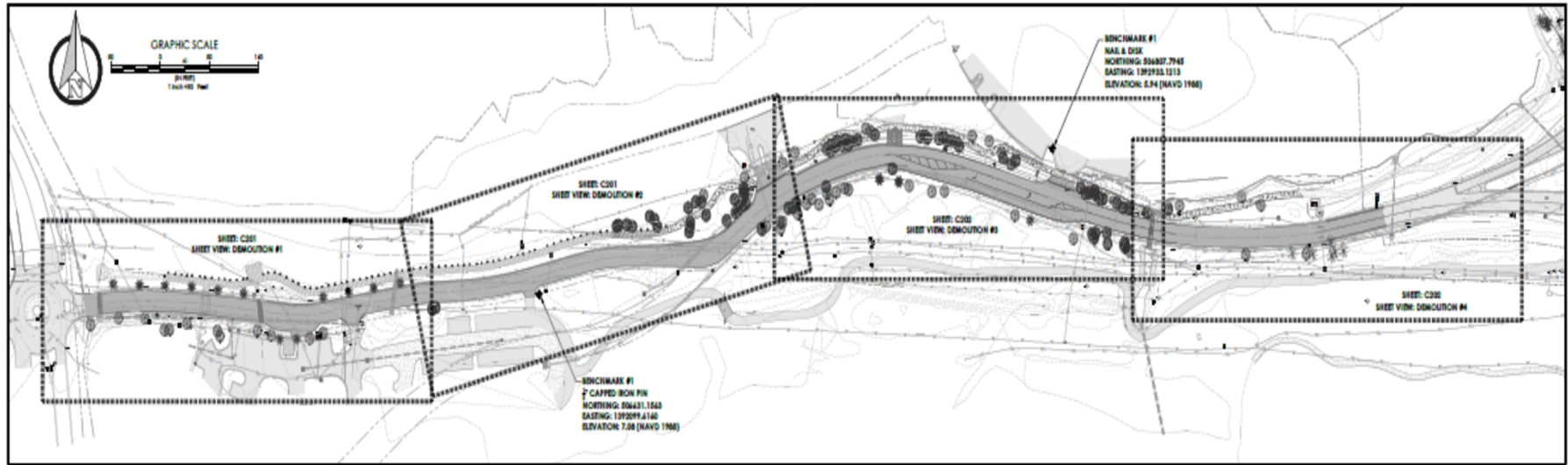
# HERON WALK DRIVE IMPROVEMENTS

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- Walton County Development Order has been issued.
  
- Project is being broken into phases
  - This will allow Development Order to remain in effect
  - Phase I includes improvements will be done to areas that won't effect traffic flow.
  - Board approved \$9,050 on February 23 for engineering of walkway and drainage improvements.



# HERON WALK DRIVE IMPROVEMENTS



# EAST GATE RECONFIGURATION

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- An Ad Hoc Committee was appointed by the Board on February 23, 2023.
- Committee will review preliminary conceptual design that was created by Kimley-Horn
  - Included adding additional left exit turn lanes and splitting the access into two entry points, which includes having two security gates
  - The additional gates would increase stacking room for inbound traffic.







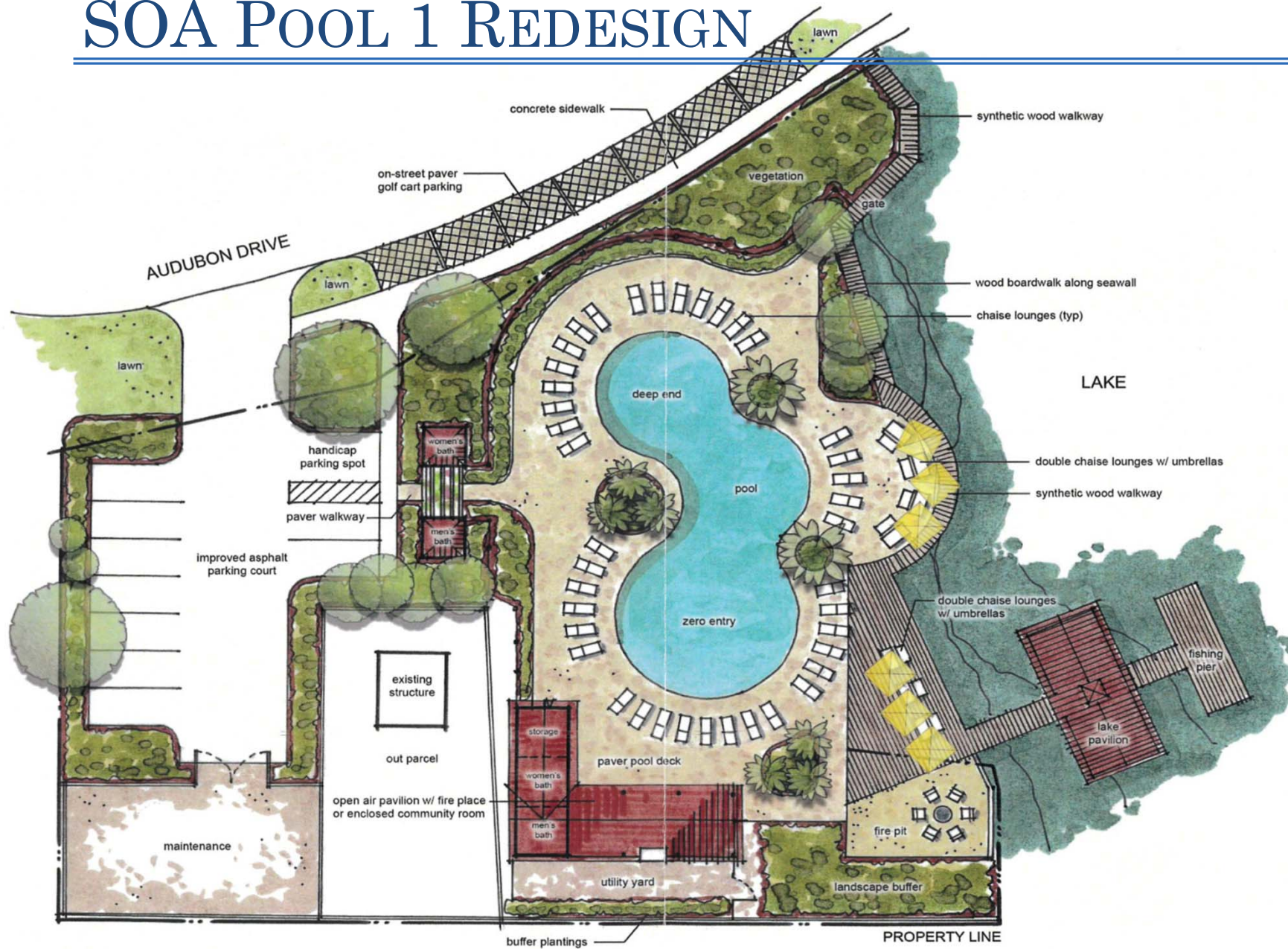
# SOA POOL 1 REDESIGN

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- An Ad Hoc Committee was appointed by the Board on February 23, 2023.
- The committee will review the conceptual plan that was created a few years ago and recommend a proposed redesign to the Board.



# CONCEPTUAL SOA Pool 1 REDESIGN



# WAY FINDING SIGN REDESIGN CONCEPTUAL



The left side of the slide features a decorative vertical bar composed of several elements: a thin solid blue line, a wider band with a fine grid pattern, another thin solid blue line, and a final thin solid blue line. Below these lines are five solid blue circles of varying sizes, arranged in a cluster that tapers to the right.

**QUESTIONS?**



# PROPERTY SERVICES

Kyle Ray

Property Services Director

(850) 424-5922

[kray@soaowners.com](mailto:kray@soaowners.com)

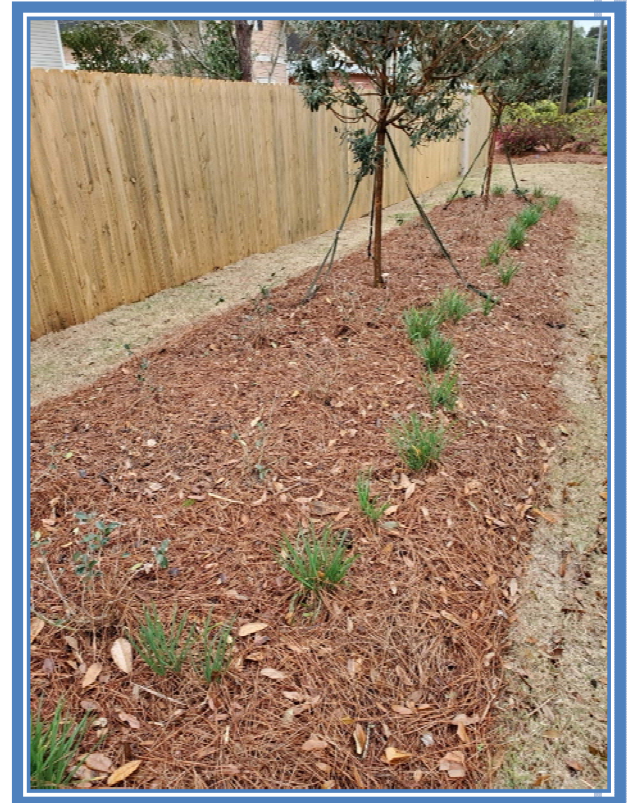


# COMPLETED PROJECTS

# BAYTOWNE PARCEL

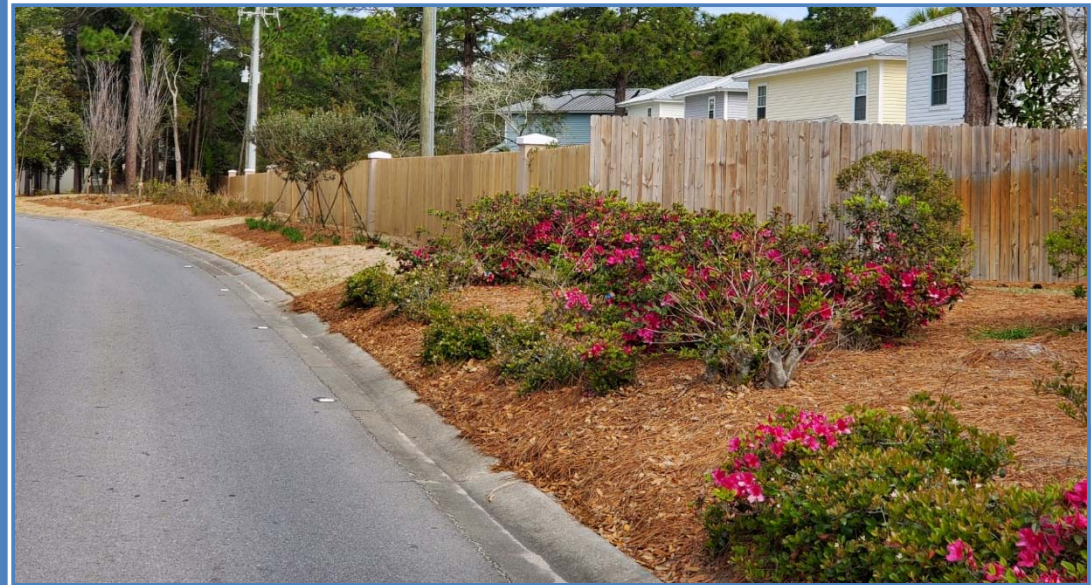
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- SOA obtained a parcel on Baytowne Ave, just north of Bungalos that was in need of landscape and irrigation revitalization.
- The Board approved \$60K in April 2022 for improvements.
- Project was on hold until FP&L was done boring.
- Improvements complete prior to recent freeze, contractor is evaluating for replacement.





# BAYTOWNE PARCEL



# BAYTOWNE DISCHARGE

The Board approved \$282K from Undesignated Capital to install the check valves to prevent bay water from entering the lake.



# SOUTH PUMP STATION

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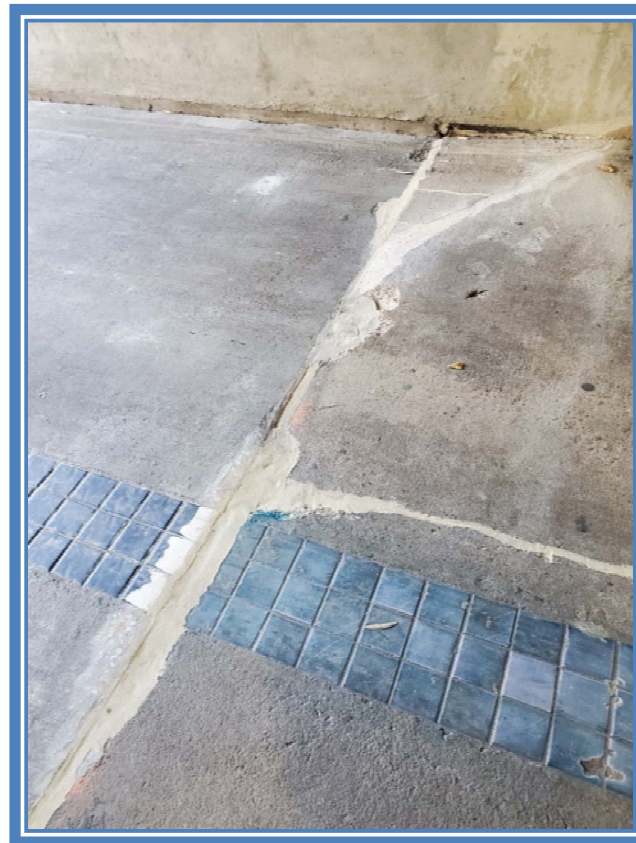
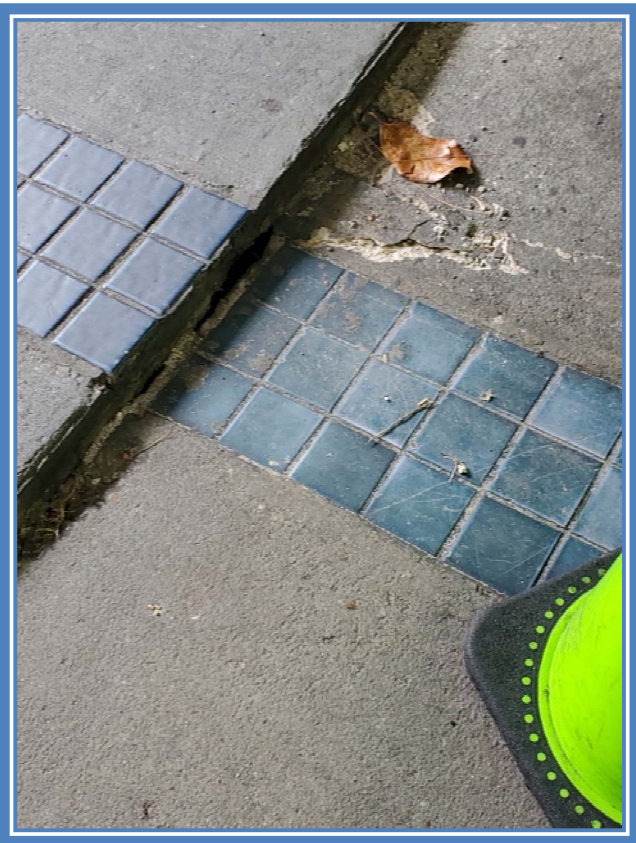
Board approved \$32K from Reserves to replace the decks and one pump.



# TUNNEL DRIVE AISLE REPAIRS

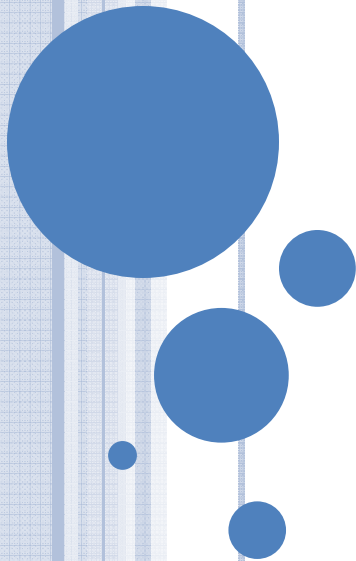
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- Drainage pipe under the tunnel, that carries all stormwater from the south side of the community to the Bay, was failing, causing the concrete to sink.
- Foam was injected to lift the concrete and, in the process, it filled some of the voids in the pipe preventing further leaking.
- Cost of project was \$27K from Emergency Reserves



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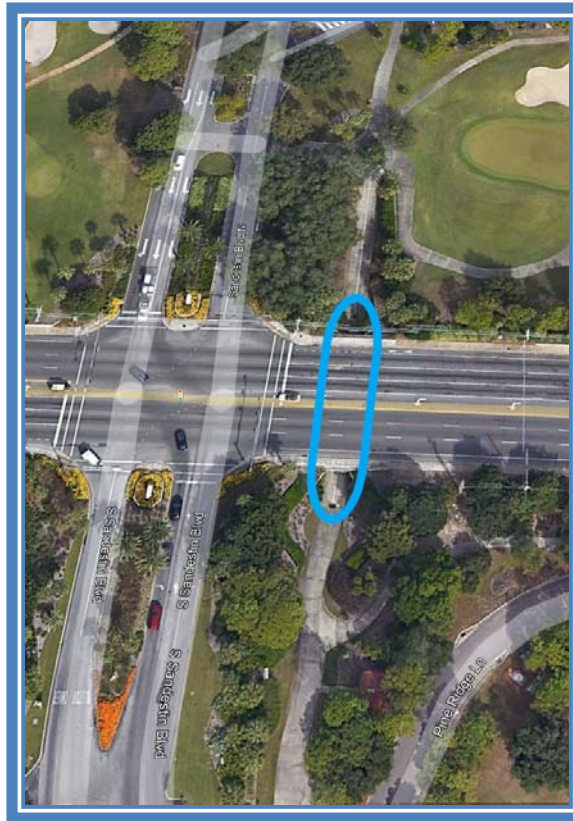
# ONGOING AND UPCOMING PROJECTS



# TUNNEL PIPE LINER

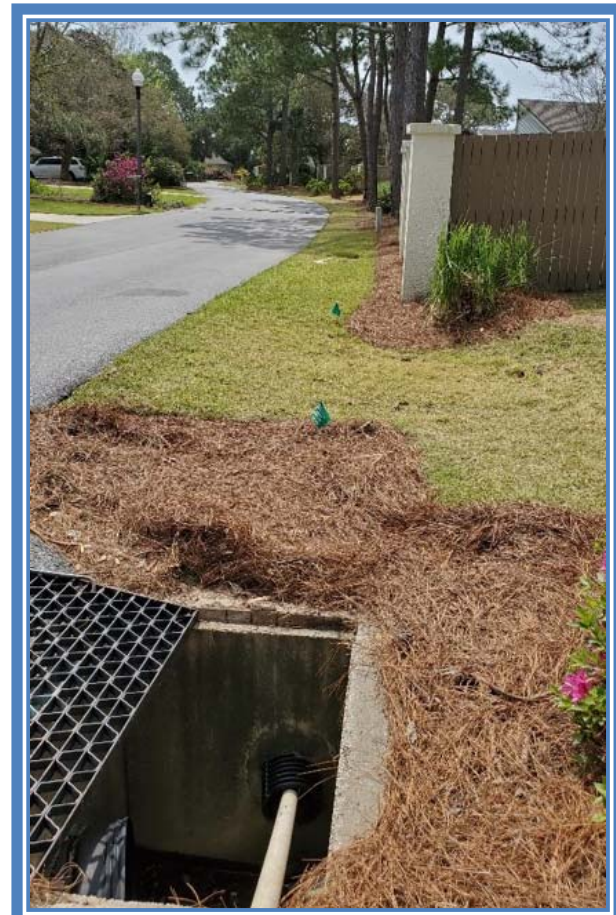
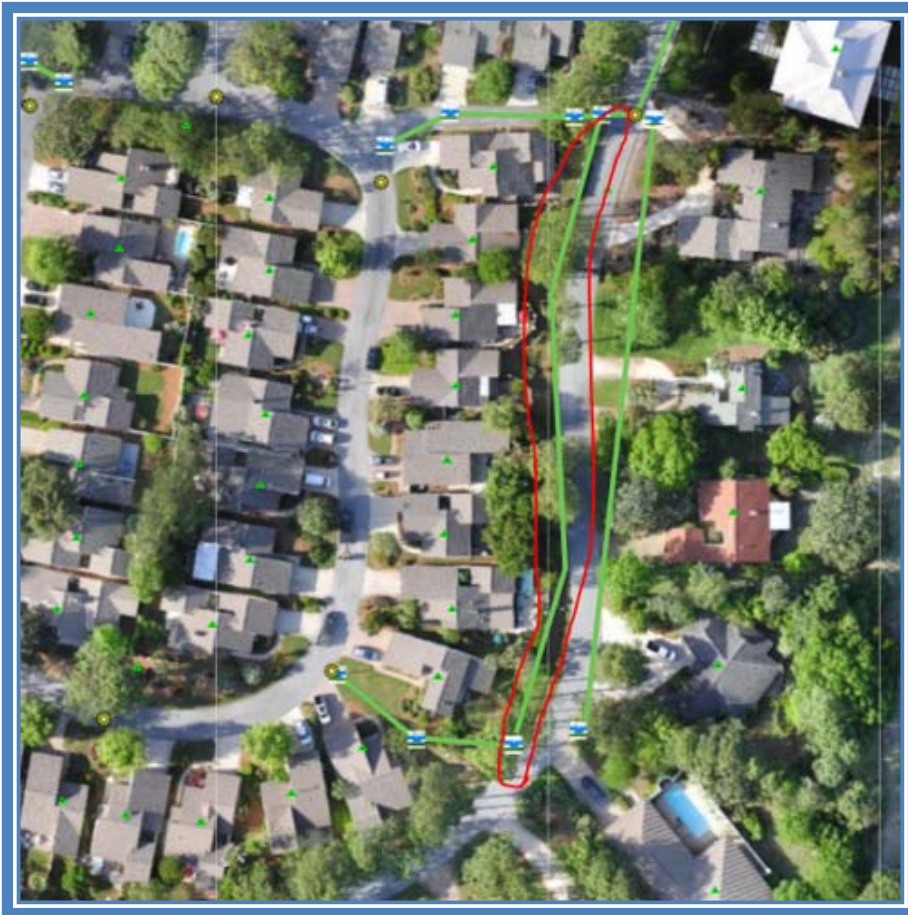
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Board approved \$85K to insert a liner into the drainage pipe that goes under the tunnel.



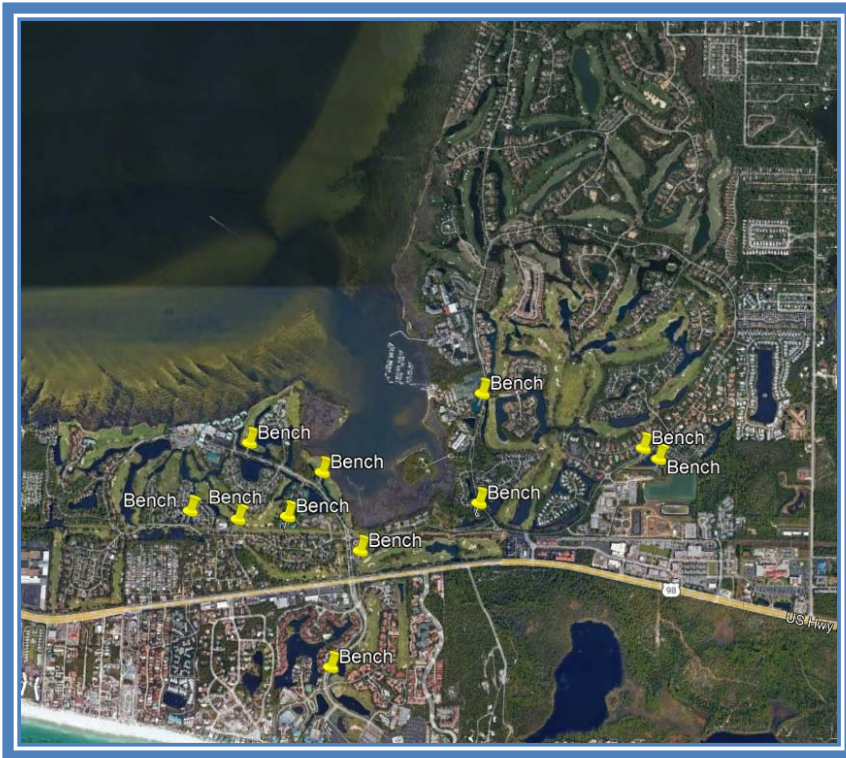
# GOLFVIEW DRAINAGE

Board approved \$15K on February 23, 2023 from Reserves to move forward with obtaining a stormwater design and construction plans.



# COMMUNITY BENCHES

Maintenance Committee reviewing various areas throughout the community for new benches.







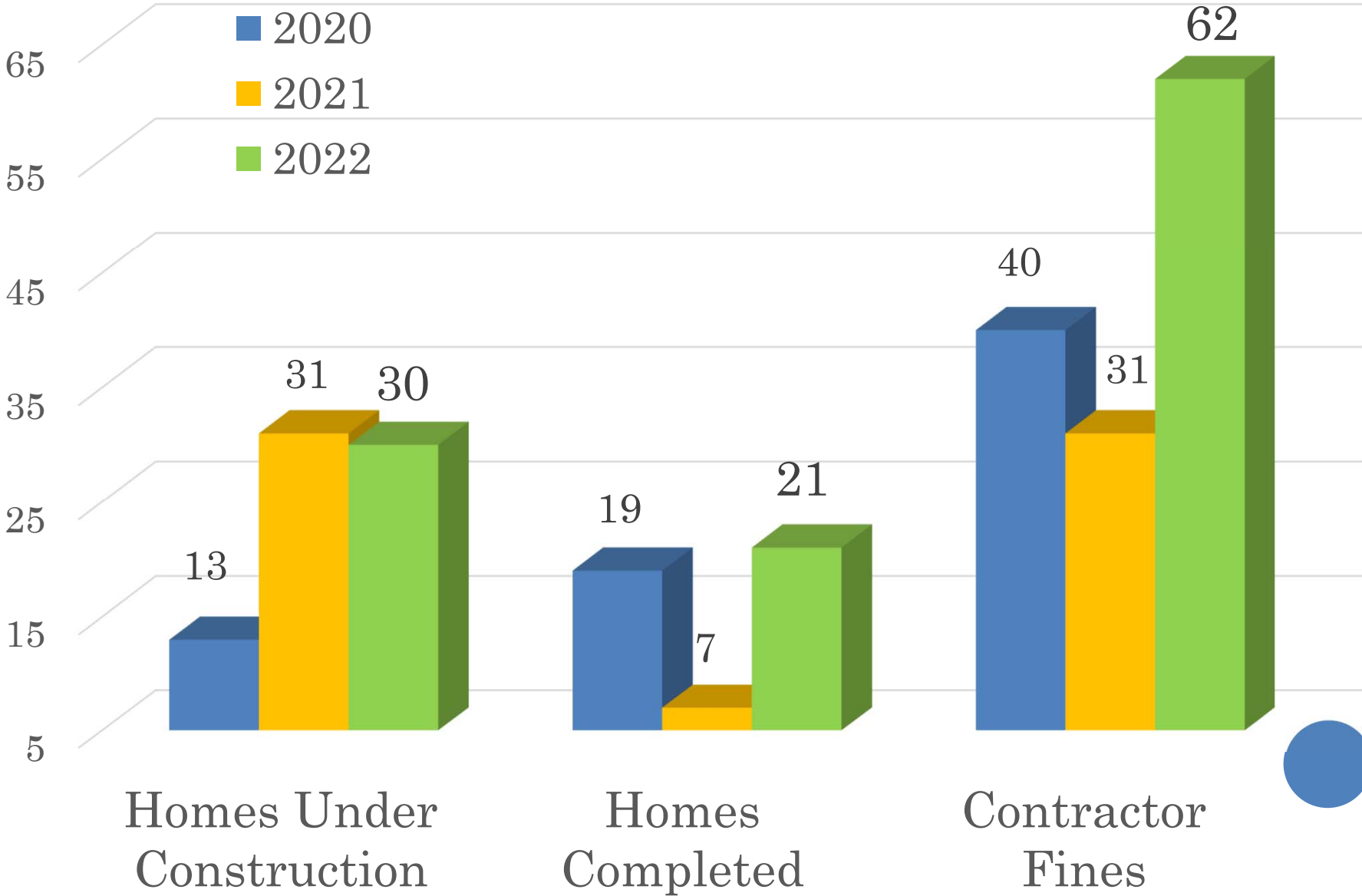
# ARCHITECTURAL REVIEW BOARD (ARB)

Anissa Cannon, Administrator

(850) 424-5930

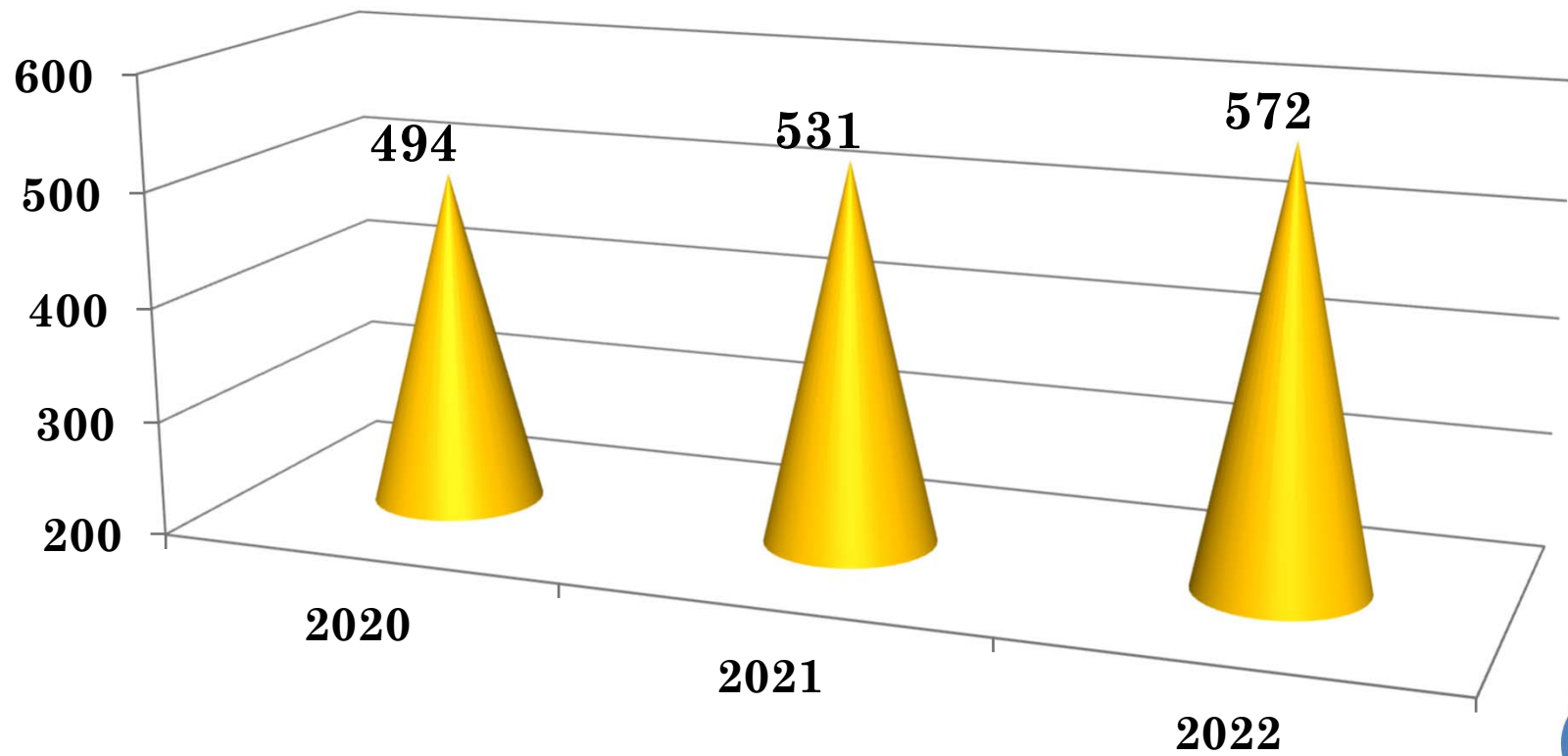
[acannon@soaowners.com](mailto:acannon@soaowners.com)

# ARB STATISTICS



# ARB STATISTICS

Total Submittals





# COMMUNICATIONS – CUSTOMER SERVICE

Victoria Klamerus  
Assistant Executive Director  
(850) 424-5955  
[vklamerus@soaowners.com](mailto:vklamerus@soaowners.com)

# UPCOMING PROJECTS

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- QR Codes to link owners and guests to important community safety policies
- Mass text messaging to communicate time sensitive information to the members
  - Watch for “opt in” information via the weekly emails.
- Safety video “shorts” to be created and posted on social media platforms to improve communications with all audiences.
  - Rental guests, day visitors, etc.





# SECURITY

**Jimmy Willis**  
**Director of Security**  
**(850) 424-5933**  
**[jwillis@soaowners.com](mailto:jwillis@soaowners.com)**

# SECURITY UPDATES

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- Beach Security officers will begin patrolling in March and remain in place through Labor Day weekend.
- Lifeguards will return to the beach March through October.



# SECURITY GATEKEEPER SOFTWARE

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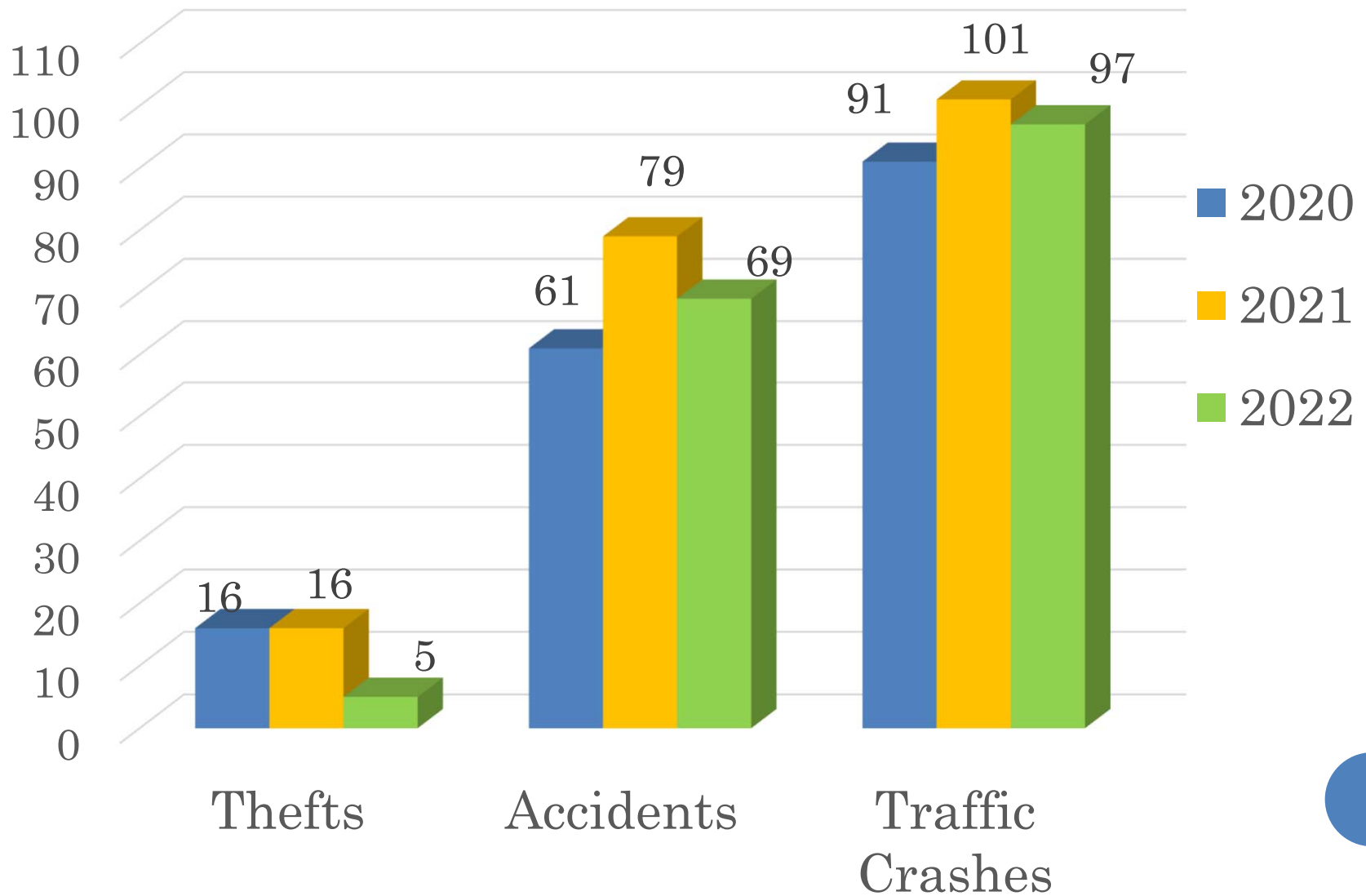
- Security Gatekeeper software upgraded to a web based system over the last week.
  - Website to register guests is the same. Link is on home page of SOA website.
  - Credentials remained the same unless you have multiple units. Please email Jimmy Willis ([jwillis@soaowners.com](mailto:jwillis@soaowners.com)) to obtain credentials for each unit.
  - With this change, it is imperative that all user have the most up to date mobile app to register guests.

**“ISN Resident”**



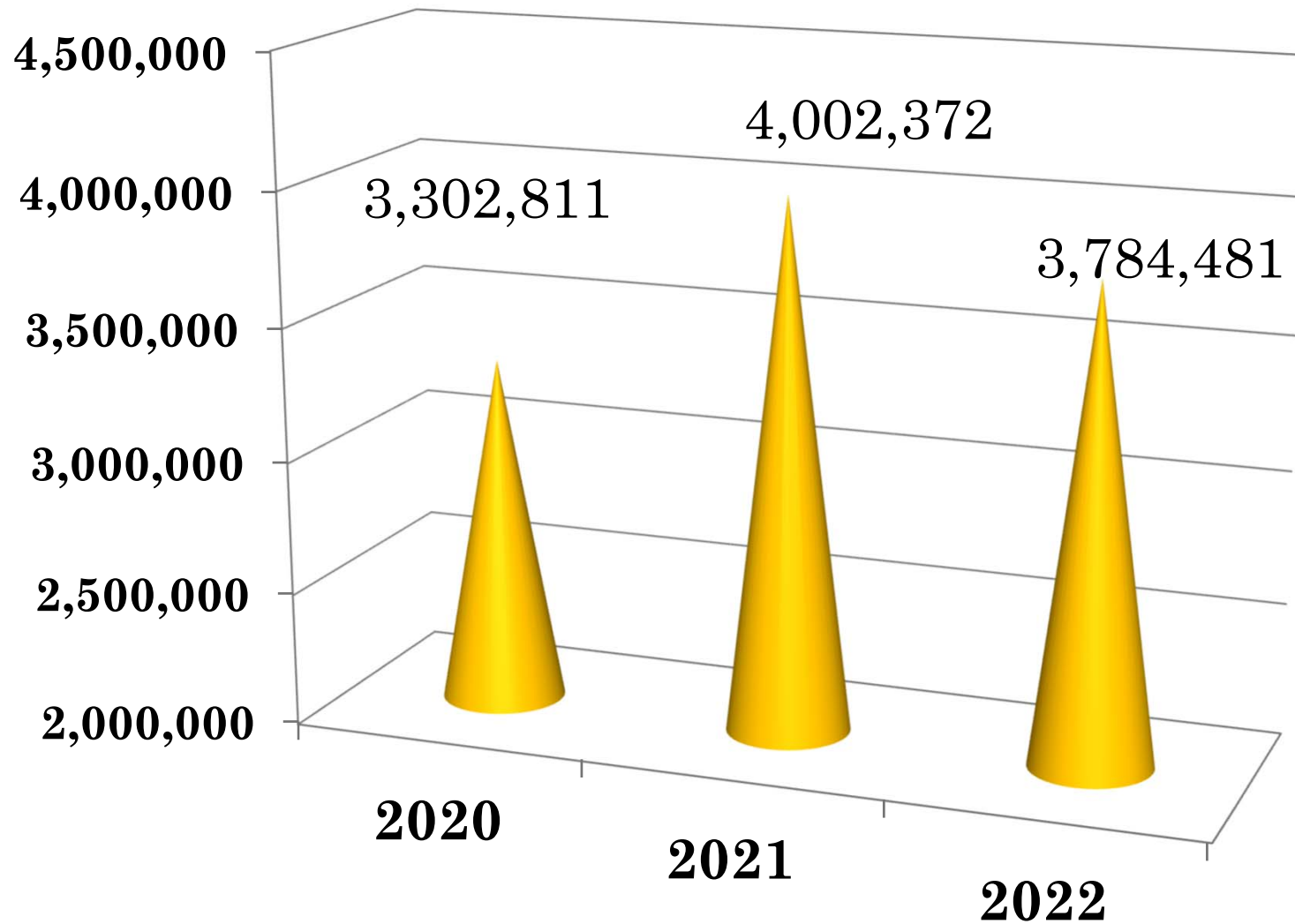


# SECURITY STATS

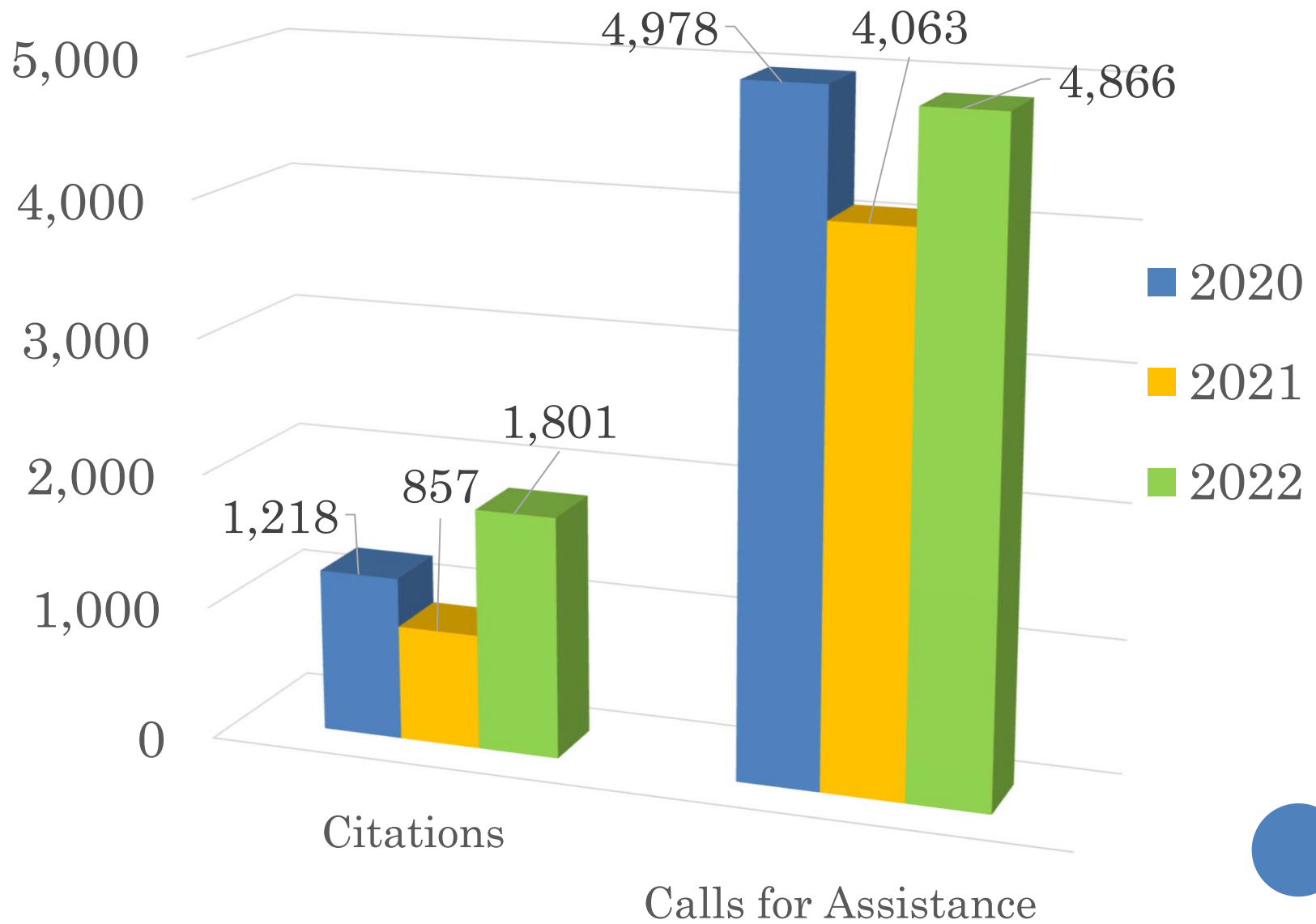


# SECURITY STATS

## Traffic Count



# SECURITY STATS



**STRAW POLL –**  
**IF THERE ARE NO PROPOSALS TO BE**  
**CONSIDERED FOR A FEBRUARY**  
**MEETING, SHOULD IT BE CHANGED TO**  
**A “TOWN HALL MEETING” THAT WOULD**  
**PROVIDE THE SAME**  
**INFORMATION/UPDATES BUT BE**  
**AVAILABLE TO ATTEND VIA ZOOM?**





**QUESTIONS?**



# 2022 AUDIT SUMMARY

**Jennifer Bailey**  
**Director of Finance**  
**(850) 424-5944**  
**[jbailey@soaowners.com](mailto:jbailey@soaowners.com)**

# INDEPENDENT AUDITORS REPORT 2022

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## **Opinion**

**We have audited the accompanying financial statements of Sandestin Owners Association, Inc. (the “Association”), which comprise the balance sheet as of December 31, 2022, and the related statements of revenues, expenses, and changes in fund balance and cash flows for the year then ended, and the related notes to the financial statements.**

**In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Association as of December 31, 2022, and the results of its operations and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.**



# 2022 INCOME STATEMENT

	2022	2022 Budget	Var +/-(-)
Revenue	\$ 10,701,983	\$ 10,617,535	\$ 84,448
Expense	10,304,204	10,229,131	(75,073)
Net Revenue over Expense After Operations	397,779	388,404	9,375
Fixed Asset Reserve	(700,000)	(700,000)	0
Depreciation Cash Flow Adjustment	302,342	299,402	2,940
Net Rev Over Expenses After Res & Depr	\$ 121	\$ (12,194)	\$ 12,315





## 2022 REVENUE BUDGET V ACTUAL (\$K)

<u>Type</u>	<u>Budget</u>	<u>Actual</u>	<u>Act v Bud Fav/(Unfav)</u>
Assessment	\$ 8,403	\$ 8,406	\$ 3
Discount	(38)	(74)	(36)
Administration	221	237	(13)
Cable	1,161	1,135	(26)
ARB	61	98	37
Accounting	148	194	46
Landscape & Irrigation	247	249	2
Beach & Pool	53	53	0
Sanitation	357	392	35
Security	<u>5</u>	<u>12</u>	<u>7</u>
Total Revenue	\$ 10,618	\$ 10,702	\$ 84

## 2022 EXPENSE BUDGET V ACTUAL (\$K)

<u>Type</u>	<u>Budget</u>	<u>Actual</u>	<u>Act v Bud Fav/(Unfav)</u>
Administration	\$ 2,092	\$ 2,100	\$ (8)
Cable	1,161	1,135	26
ARB	186	196	(10)
Accounting	374	364	10
Infrastructure	1,233	1,275	(42)
Landscape & Irrigation	1,441	1,401	40
Beach & Pool	202	197	5
Sanitation	1,140	1,188	(48)
Security	<u>2,400</u>	<u>2,448</u>	(48)
Total Expense	\$ 10,229	\$ 10,304	\$ (75)

# 2022 BALANCE SHEET

## Assets

Cash & Equiv.	3,911
Investments	9,726
A/R	91
A/R allowance	(24)
OP Lease Right-of-Use	<u>1,377</u>
<b>Total Current Assets</b>	<b>15,081</b>
Fixed Assets	4,508
Other Assets	<u>402</u>
<b>Total Long Term</b>	<b><u>4,910</u></b>
<b>Total Assets</b>	<b>19,991</b>

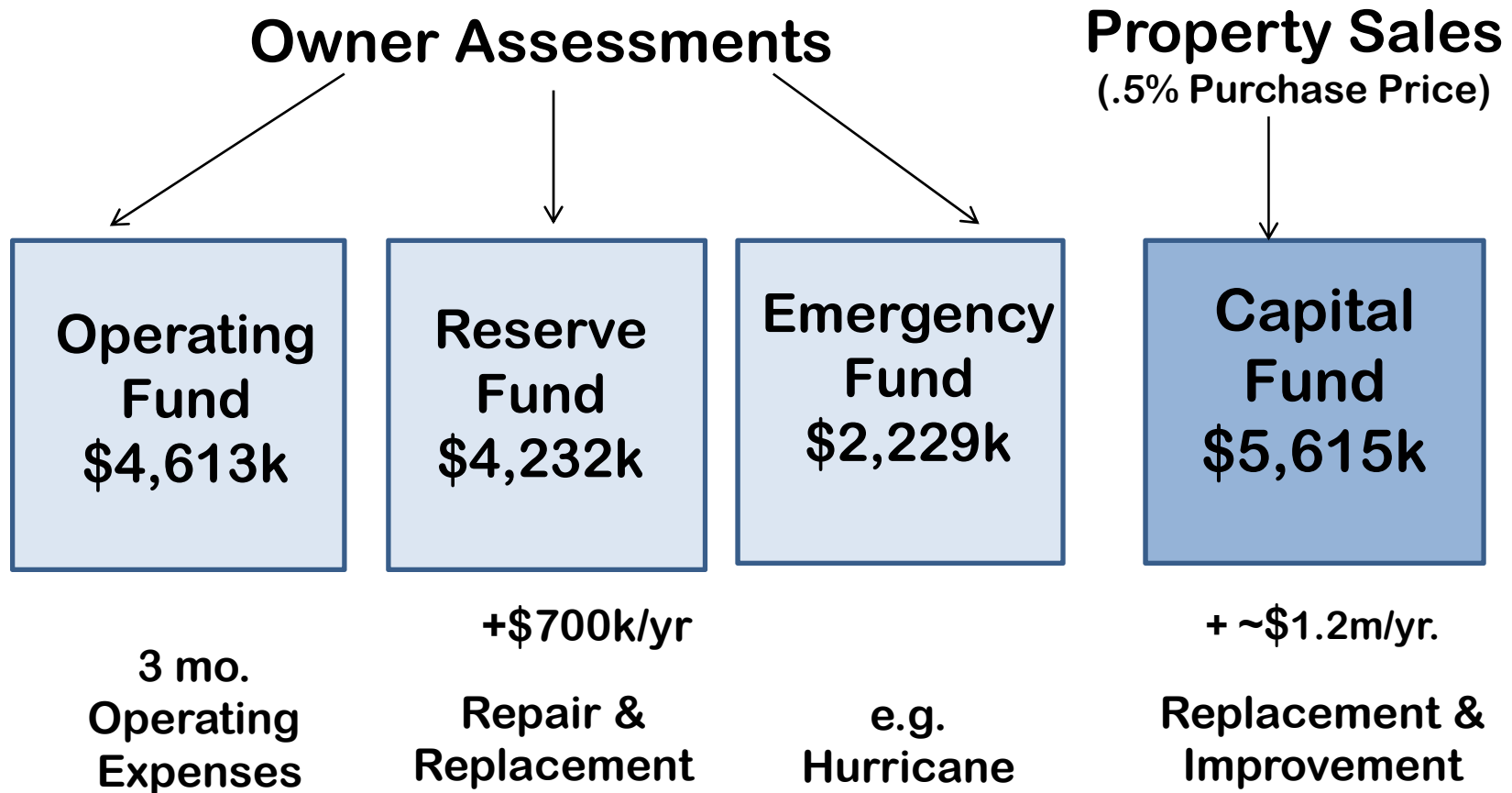
## Liabilities & Fund Balances

A/P	333
ARB Deposits	610
Deferred Revenue	970
Operating Lease Liability	<u>1,389</u>
<b>Total Liabilities</b>	<b>3,302</b>
Reserve Fund	4,232
Capital Fund	5,615
Emergency Fund	<u>2,229</u>
<b>Total Funds</b>	<b>12,076</b>
Operating Equity	<u>4,613</u>
<b>Total Liab. &amp; Equity</b>	<b>19,991</b>

# FUND BALANCE STATUS

## (12/31/2022, \$K)

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# RESERVES UPDATE

## (12/31/2022, \$K)

	<u>Fcst 23</u>	<u>Fcst 24</u>	<u>Fcst 25</u>
Beginning Fund Balance	\$ 4,232	\$ 3,840	\$ 2,992
Active Projects	0		
Projects in planning	0		
Total Active and in Process	0	0	0
Forecast Exp. per Reserve Study	842	1,848	1,070
Budgeted contribution	450	1,000	1,000
Potential Ending Balance	3,840	2,992	2,922

# CAPITAL UPDATE

## (12/31/2022, \$K)

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	<u>Fcst 23</u>	<u>Fcst 24</u>	<u>Fcst 25</u>
Beginning Fund Balance	\$ 5,615	\$ 3,650	\$ 2650
Active Projects	665		
Projects in planning	2300	2,000	1000
Total Active and in Process	2,965	2,000	0
Forecast Contribution	1,000	1,000	1,000
Potential Ending Balance	3,650	2,650	2,650

# 2023 BUDGET

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Assessment Revenue, Net (\$75k) Discount	\$8,761,061
Other Revenue	<u>2,233,153</u>
Total Revenue	10,994,214
Operating Expenses	<u>10,891,820</u>
Net Rev Over/(Under) Expense After Operations	102,394
Reserves	450,000
Depreciation Cash Flow Adjustment	<u>(347,937)</u>
Net Rev Over/(Under) Exp After Ops, Res & Depr	\$331





**QUESTIONS?**

**FUTURE MEETING**  
**October 27, 2023**