

HARTSTENE POINTE STRATEGIC PLAN REPORT

Section I

Definition/description of the Project

Rationale for planning

The Hartstene Pointe Maintenance Association Board's purpose for completing this planning project was to provide increased clarity and consensus on our values, vision, and goals. The project attempts to ascertain what and/or who we are as a community. What is it about this community that brought us here? What are the attracting physical and/or community attributes? What are the things that keep us here and of the things that keep us here, which do we value most? Finally it asks, and attempts to answer, the question, which of these things are the most critical to the existence of the community and what are the things that must be addressed now?

Planning Steps

The planning employed a three step process.

Step one: Information gathering. Specific population focus groups representing different parts of the community were formed to determine what the community saw as the most critical issues, the things that most needed doing and their views of the Pointe now and in the near future. The focus groups were selected to obtain views from selected leaders at Hartstene Pointe, the staff that work daily with us, and part-time owners. The focus groups were composed as follows:

- Focus group 1: Past officers and members of the Board of Directors
- Focus group 2: Sitting board officers and members
- Focus group 3: Sitting committee chairs
- Focus group 4: Staff
- E-Mail Sample: Part-time owners

The Groups addressed the following questions:

- a) As a community, who are we now and what might we be in the near future?
- b) What will the Pointe be like in 10 years? (This is the time frame the plan addresses)
- c) What are the most desirable characteristics of the Pointe?
- d) What are the **5** most critical issues?
- e) What are the **3** things that absolutely must be done now?
- f) What **1** action most assures that the critical issues and "must do's" can be addressed?

Survey development

Step two: Develop and conduct a survey of the whole community.

The information gathered through Step 1 was used to form the survey instrument that was sent to all owners. The survey addressed the same questions as the focus groups. It shared the thought and visions of the focus group participants, solicited owners' degree of agreement or disagreement and invited their views and comments. (The survey is attached in Appendix 2.)

Section II

Survey outcomes: General discussion

Survey Confidence: Return Rate and Comparison of Results to Hartstene Pointe Statistics

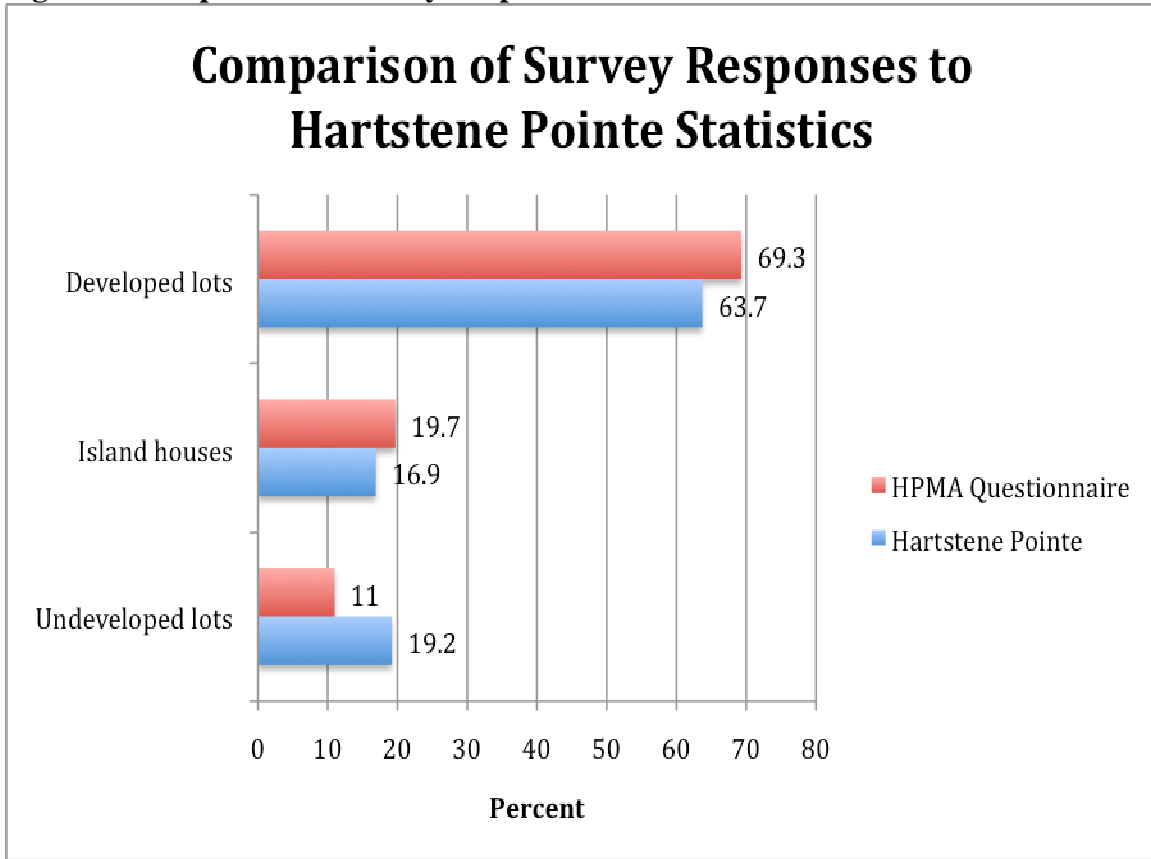
There were 294 questionnaire completed. The number of lots is 532 and the number of individual owners is 506. Taking into account the number of owners of more than one property, the return rate for the survey was 58%. This return rate is considered adequate for making conclusions.

A comparison of types of owned property indicates that owners with homes or island houses at Hartstene Pointe were more apt to complete a survey, than were owners of undeveloped lots. (Figure 1) While 81% of the Hartstene Pointe lots are developed, the owners of developed lots comprised 89% the survey respondents.

The percentage of respondents who said they rent out their property was similar to Hartstene Pointe data, both 4%.

A comparison of answers to key questions by type of ownership showed little or no difference. Therefore responses reflect the population.

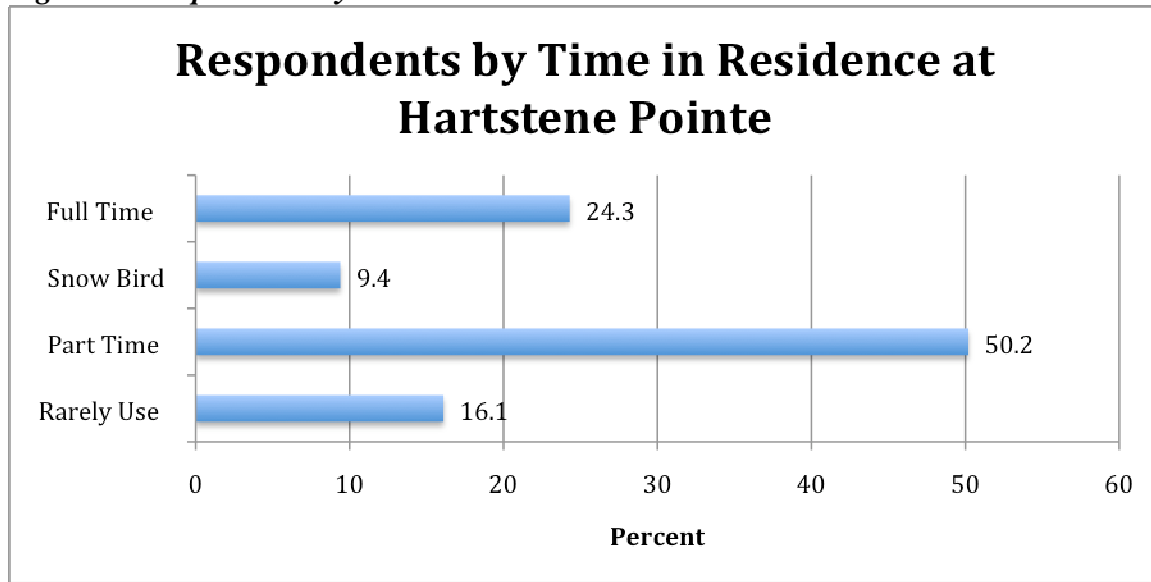
Figure 1 Comparison of Survey Responses to Hartstene Pointe Statistics



Who are we?

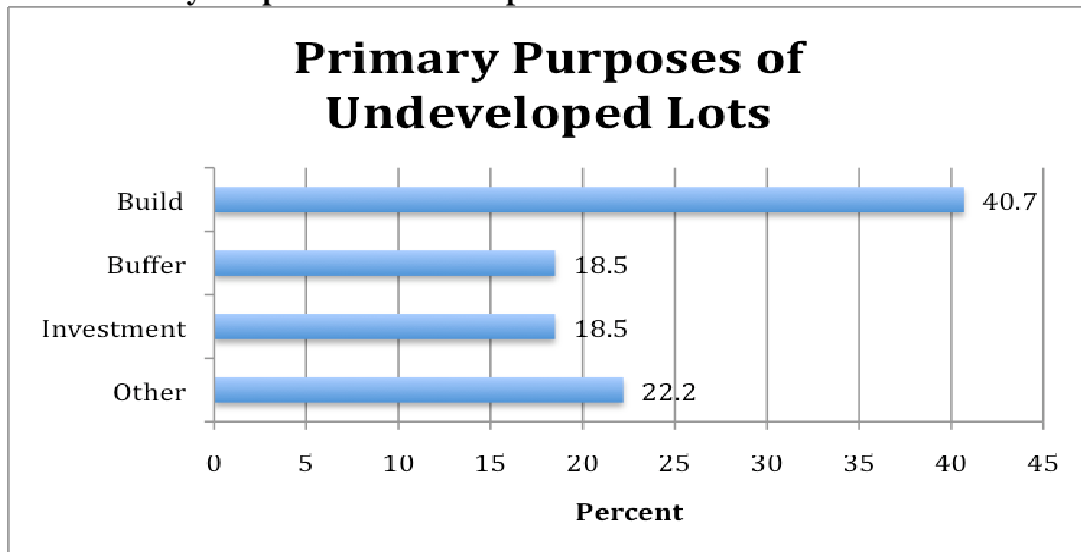
The majority of the respondents identify themselves as part-time residents. (Figure 2) Approximately ¼ of the owners live full time at the Pointe, 10% are “snowbirds” (i.e., live full time at the Pointe for part of the year and reside elsewhere for the remainder). One-half of the respondents are part-time owners and one out of six owners rarely use their HP property.

Figure 2 Respondents by Time in Residence at HP



Approximately 20% used their extra lots as buffer space and almost another 20% stated the purpose of the unimproved lot was for investment.

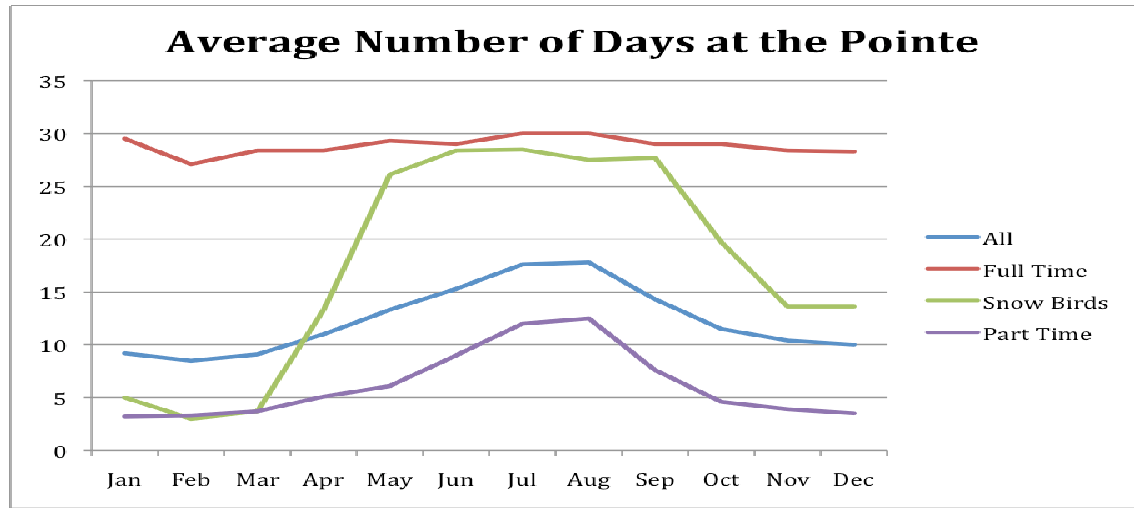
Figure 3 Primary Purposes of Undeveloped Lots



Forty-four percent of the owners said they had a view of Puget Sound from their property.

The number of days owners are present at Hartstene Pointe differs among the groups, as would be expected, with a year round presence for full time residents, and the remaining groups spending more time at the Pointe during July and August and less during the cold, wet winter months. Taking into account all types of respondents, the average owner was present at the Pointe 18 days during July and August. (Figure 4)

Figure 4 Average Number of Days at Hartstene Pointe

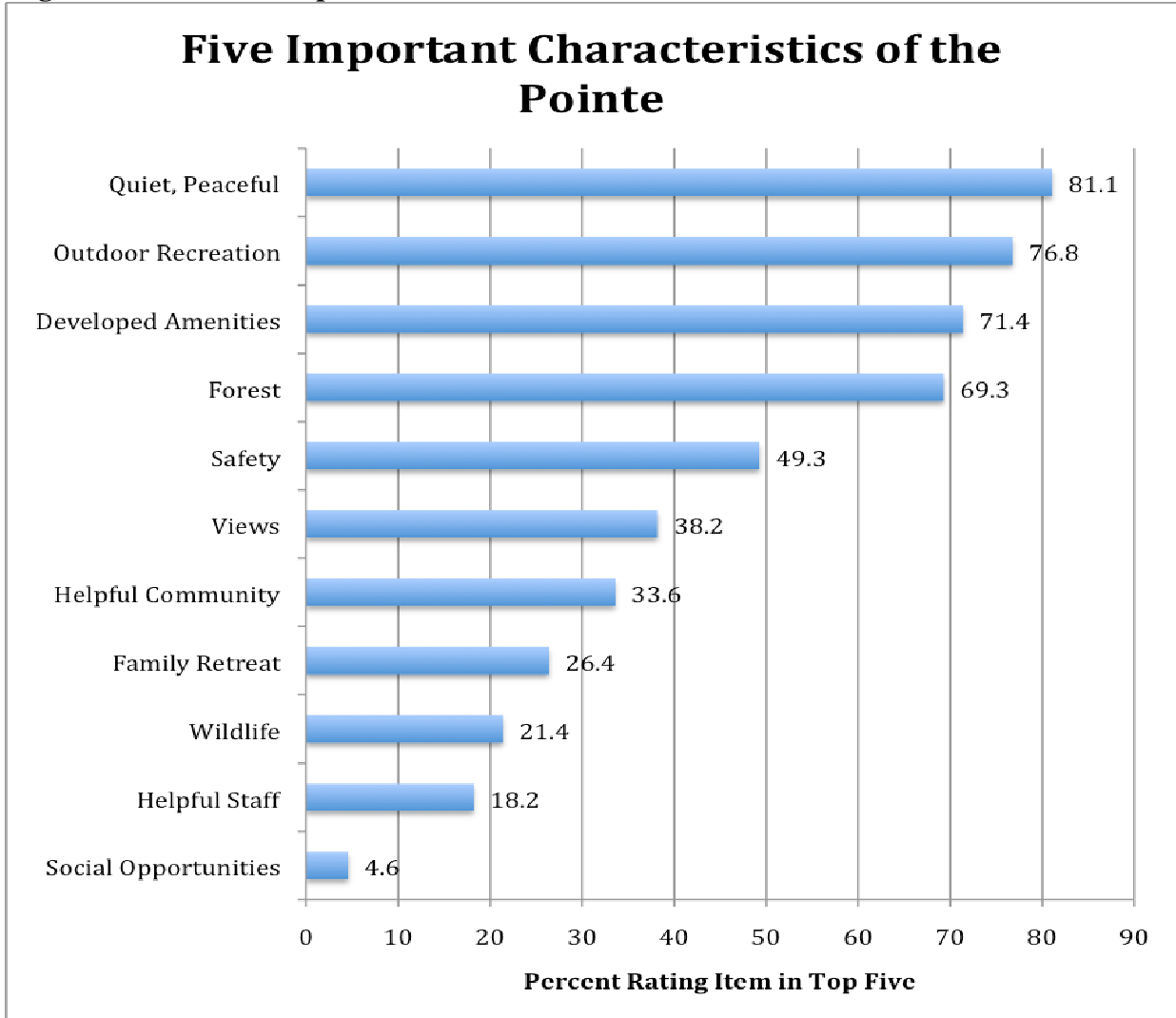


The age breakdown of the owners and their families that use the Pointe suggest that there are slightly more users over 55 than under. Children are Pointe users, also. Almost one-half of the responding owners stated that their families had children. One-third of the owners noted that their families included school age children, one-fourth had high school age children and one-fifth, pre-school children.

Characteristics Important to Owners

Owners were asked: What are the five most important characteristics of the Pointe? Their answers showed a high degree of similarity. The highest rated items were: “Quiet, peaceful environment, outdoor recreational opportunities, developed amenities and the forested environment. (Figure 5)

Figure 5 Five Most Important Characteristics of Hartstene Pointe



Views of Owners Regarding Who We Are

Owners were asked to indicate their agreement or disagreement with four assumptions regarding the characteristics of the owners at Hartstene Pointe. Respondents agreed that 75% are part-time and 25% full-time owners. The majority of the respondents agreed that most of full time owners are retired. Two thirds of the respondents also agreed that the percentage of retired persons was likely to remain stable during the next ten years. But about 60% of the respondents thought the non retired population at Hartstene Pointe would be younger in the next ten years due to turn over in ownership and younger members of the existing owners becoming primary users of the property. Write in comments, while few in number, suggested that the economy could affect ownership, with fewer vacation dwellings and with fewer younger owners because of lack of money for second homes.

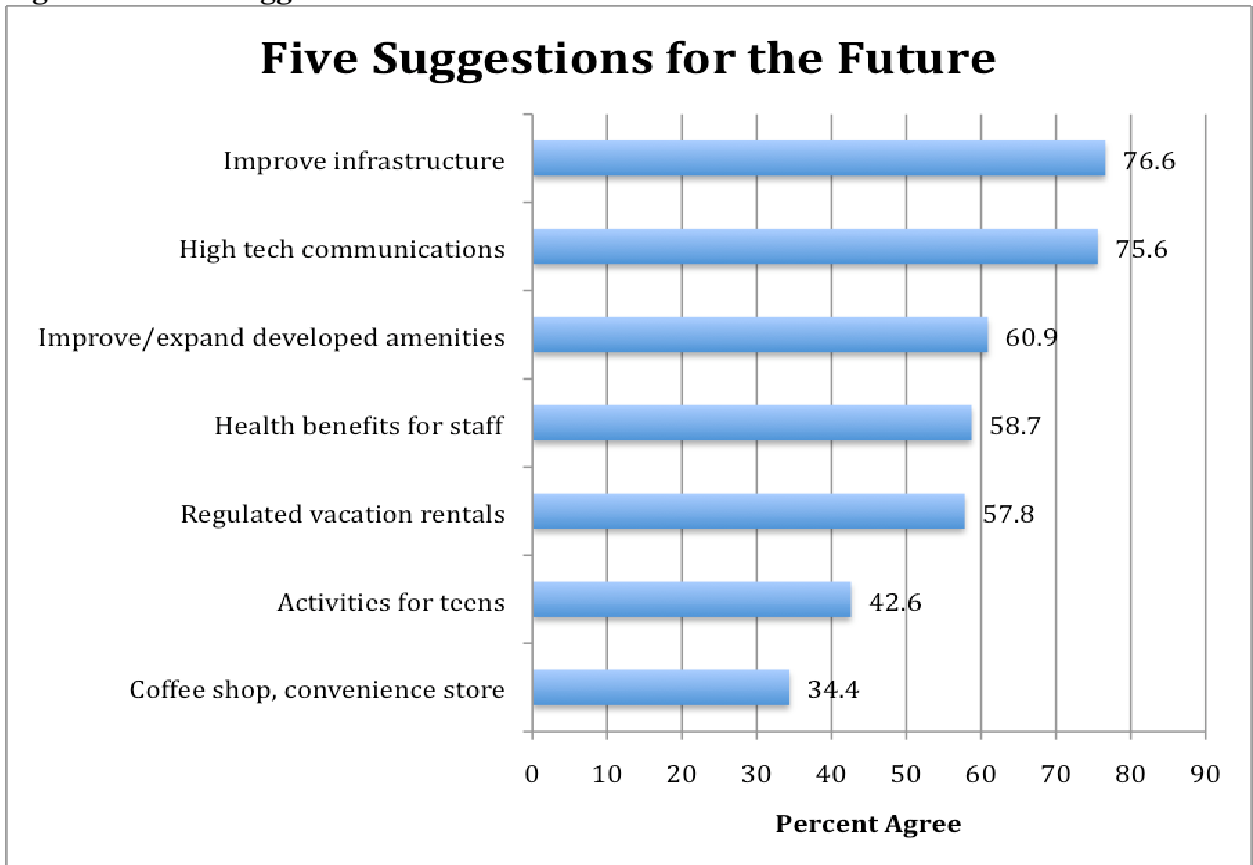
Views of the Owners Regarding the Future

Owners were asked what they thought Hartstene Pointe would be like in the next ten years. Most respondents were optimistic about the future of the Pointe. Almost all those completing the survey thought owners would continue to build new homes and upgrade existing homes and cabins. They thought the physical environment and ambiance will make it an even more desirable place to live, and by maintaining the environment, the Pointe will continue to increase in value as Mason County and other surrounding areas build out. Most owners thought that the Pointe would successfully manage and retain its forested ambiance and continue to attract wild life. While many owners were optimistic, just over one-third of the owners, however, agreed with the statement: The Pointe’s built amenities and facilities will be in decline because necessary up-keep, development and upgrading is not possible at current revenue levels from home owner assessments, fees, grants, gifts and in-kind contributions.

Suggestions for the Future

Owners were asked: “What additions or improvements would you want in the next ten to twenty years?” A large percentage of the owners would like additional improvements. Figure 6 below summarizes the findings.

Figure 6 Five Suggestions for the Future



Final for review

Three fourths of owners suggested improvements in the infrastructure – roads, gate, and the water-sewer system. The water-sewer system is not a HPMA responsibility, but other infrastructure items are.

Sixty percent of the responding owners expressed a desire to improve/expand existing amenities. The list generated by write-in comments is extensive and includes: a cover for the pool, added security, and improvements to the clubhouse, marina, trails and exercise room.

The need for better cell telephone, TV and computer communication at the Pointe is an issue noted by the owners. This is not directly in HPMA's control, but is something that could be pursued.

Another suggestion that has ongoing associated cost identified with it, was health care for employees.

While many of the write-in comments indicated desires for improvements, a minority of owners wanted to make no further changes.

Communications

Owners were asked how they preferred HPMA to communicate with them. The following pattern emerged:

- First choice – E-mail
- Second choice – Mail
- Third Choice - Newsletter
- Fourth Choice - Website

Optional Contracted Services

Organized services for Hartstene Pointe

Focus group participants discussed the possible benefits of having organized services available to help aging owners live in their homes longer. Because of these comments, a question was added to the survey that was sent to all owners: What services would be helpful so that you could live longer at the Pointe?

The response to this question was surprisingly positive. We included five items in the questionnaire and over one-half of the owners approved all items: cleanup and property maintenance, cleaning, shared transportation, personal assistance, and equipment and tool pools. (Figure 7)

Owners suggested additional items: A van owned by the community that would be available for trips to Shelton and Olympia, lists of preferred contractors to do work, organized services so several owners would have only one service call, and perhaps a system of bartering.

Some services are available now, mostly on an informal basis, but survey responses and conversations with property owners suggest there may be a need to organize optional services. These services could be provided by volunteers or for a fee. The organizational structure would be separate from HPMA and participation would be entirely optional.

This concept could be developed to fit our unique situation at Hartstene Pointe. It requires a passionate group of residents, rather than the board, to develop it.

Figure 7 Optional Contracted Services



Critical Issues , “Must Dos” and Pivotal Issues for Hartstene Pointe

For this analysis, we combined the two questions: What are the critical issues? What are the “Must dos”?

The outcomes for these two questions are included in the following charts.

Figure 8 Five Critical Issues at Hartstene Pointe

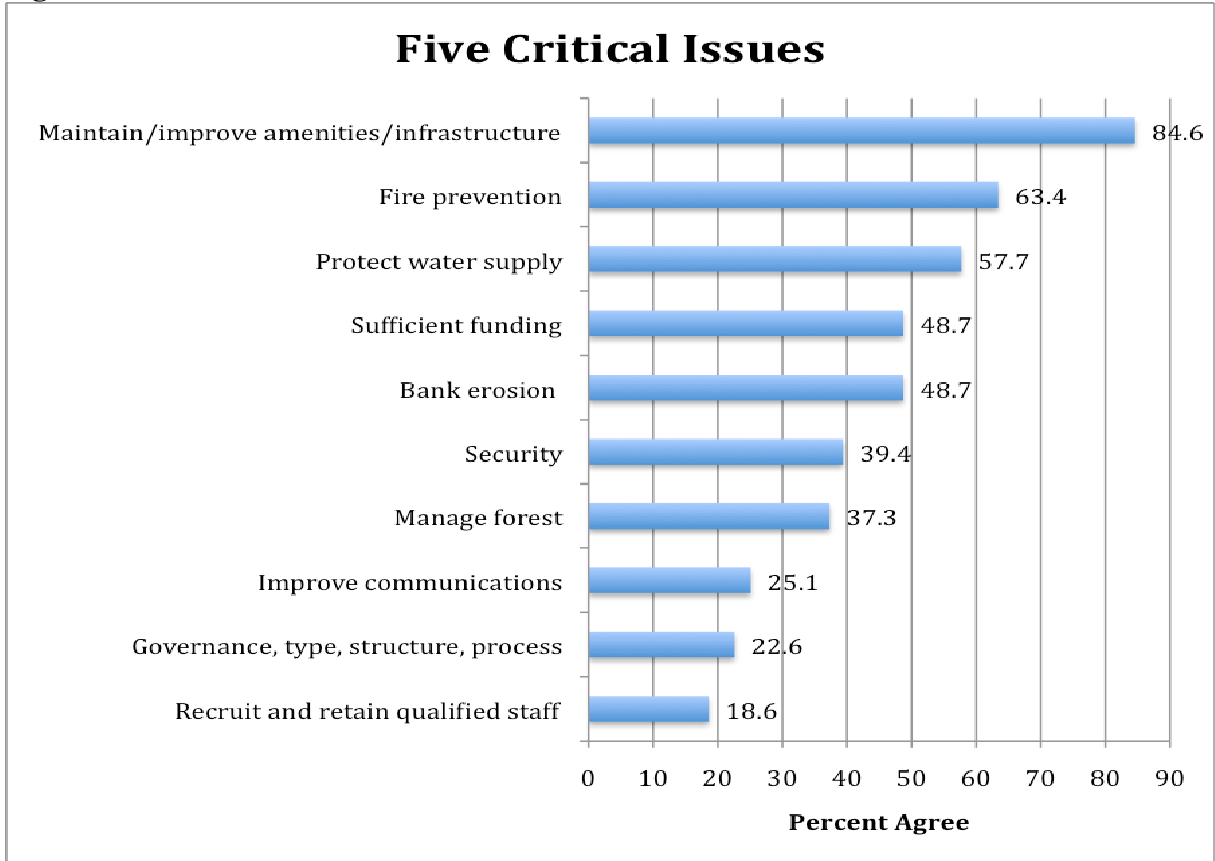
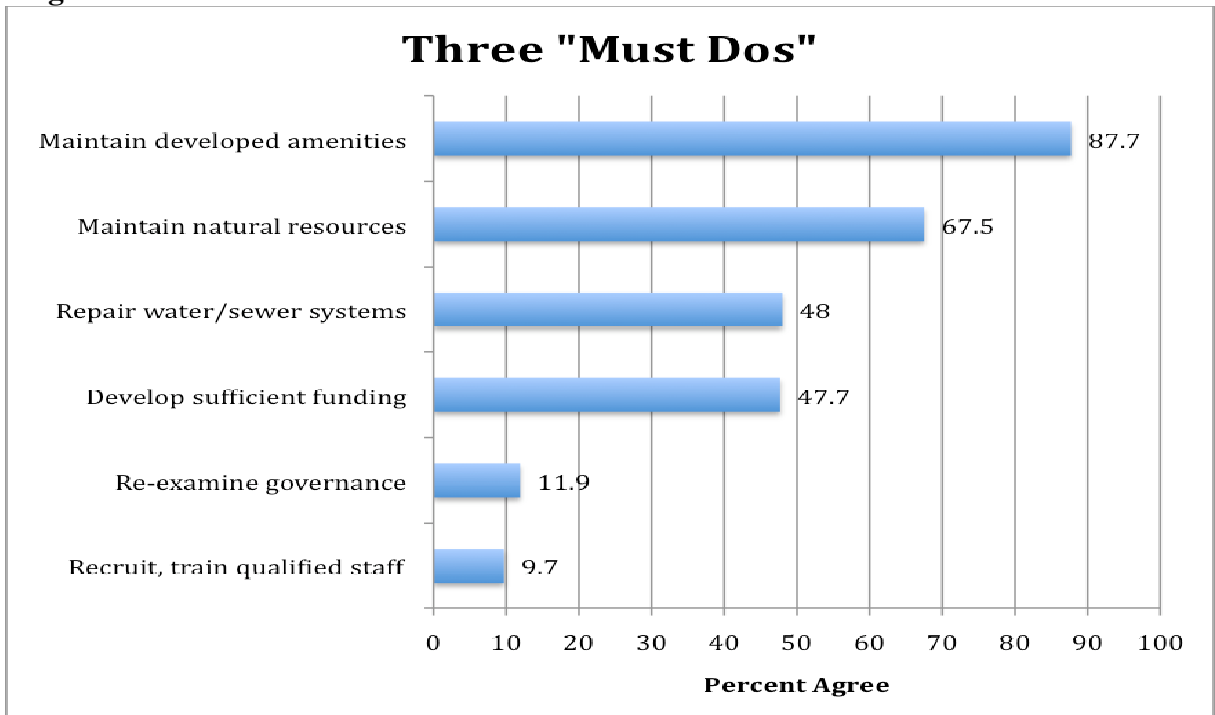


Figure 9 Three "Must Dos" at Hartstene Pointe



Maintain our developed amenities:

Must do #1

Maintain/improve our built amenities /infrastructure, Critical issue #1

Discussion

Hartstene Pointe contains 532 developable lots and, as of 2011, it is approximately 80% built out. There are 103 lots available for development. Survey data indicate that approximately 30% or 30 owners of unimproved lots expressed an interest in building on their lots in the next ten years, and another 30% (30) stated they might build or did not know. Another 20% (20) indicated that they planned to sell their property, with the possibility of someone else building. We can assume that approximately 10% (10) of the lots will continue to be used as buffer lots.

Table 1. Respondents' Plans for Their Property in the Next 10 Years

In the next ten years, do you anticipate that you might:	YES	NO	MAYBE	DON'T KNOW
Sell your property	22.2	42.2	21.3	14.2
Build *	29.1	37.5	29.1	4.2

*Based on undeveloped lots

This suggests that there could be 30 to 60 homes built within the next ten years. Approximately 30% of the owners of developed properties live full time in their residences. If the same percentage continues for developed lots, **we would expect 9 to 18 more full time households.**

The increase in new homes will likely be gradual over the next ten years, so the added impact on the Pointe's amenities will also take place slowly.

During the summer months there will, of course, be an increase in the number of people at the Pointe. On the average owners report being at the Pointe an average of over half of the summer days—18 days in both July and August. An increase of from 30 to 60 more homes would put an increased demand upon the Hartstene Pointe summer amenities, including the pool, spa, tennis courts, picnic areas and clubhouse.

Implications

Growth

It is reasonable to assume that some of the current full time owners will “age out” or simply choose to live somewhere else. If we assume that the current economic job growth/loss and market earning trends will remain the same for the next decade or return

to the growth rate that preceded the 1998-2008 bubble boom, **we should expect little change in owner type and/or occupancy rate at the Pointe.**

Use

Owners' use of the Pointe will likely change. These same economic trend possibilities suggests that vacationing close to home will likely increase. This implies that even if the type of ownership stays the same, **the number of days spent at the Pointe by part time owners will likely increase.** May through September will remain the most used months, and will possibly increase above the average 18 days per owner for July and August. Use by individual fulltime and snowbird owners will likely remain the same. It is reasonable to assume that the relative age distribution of families will remain the same. Forty-seven percent of the responding owners noted that their families include children age 0-18.

Given the probable increase in use by owners, there could be an increase in the number of children who use the Pointe, especially during the summer months. This suggests the need to clarify whether the community's expectation will be that children adjust to the current policies and accommodations or that the Pointe will increase programming for children. The need to provide programs for children was not noted as a "Critical Issue" or a "Must Do" but was ranked as fifth in "Suggestions for the Future".

Maintain our natural resources:
Must do #2
Fire prevention: Critical issue # 2
Protect water supply: Critical issue #3
Bank erosion: Critical issue #4

Discussion

The owners identified three of the top five 'most important characteristics' related to our community's natural resources. They are:

- 1) Quiet and peaceful nature of our environment
- 2) Our outdoor recreation opportunities, facilities (trails, beaches, boating etc.) and
- 3) Our forested ambiance.

In addition, the owners ranked "fire prevention", "protecting our water supply" and "bank erosion" among the top five **critical issues** needing attention. They listed fire prevention as the second of the top five and bank erosion as the fourth (tied with sufficient funding) of the top five.

When asked what three things “Absolutely Positively Must Be Done” the owners saw maintaining our natural resources as the second most important area to be addressed in the planning process.

Develop sufficient funding:

Pivotal issue #1

“Must do”#3,

Critical issue # 4

Discussion

Sufficient funding was rated as the most important pivotal condition in determining whether or not any of the issues noted would get addressed. The data, however, suggest that the **current level of use of the Pointe may increase over the next ten years, but should not likely require** any major new development. What the data do not tell us is whether or not the current revenue level is sufficient. **While there was no clear mandate to raise dues there is the clear recognition that it may be necessary.**

There were, however, two **desires** suggested for development: Improve **kitchen space** and production capacity, and increase the interior space of the club house to accommodate the need for **more meeting space(s)**. A third area that has ongoing associated cost identified with it was health care for employees.

Section III

Recommendations to the Board Of Directors: Given the above discussion, the following options are recommended:

Maintain our developed amenities:

Must do #1

Maintain/improve our built amenities /infrastructure: Critical issue #1

Population: Hartstene Pointe, as of 2011, is approximately 80% built out. There are 103 lots available for development. Of the 103 undeveloped lots, the survey data indicates that approximately 10 are used as buffer spaces. An estimate of 30 to 60 owners plan to build in the next ten years, and another 19 are investment properties that could be sold and developed. Development will take place over the next ten years.

These figures suggest that population size will likely remain the same over the next decade or increase as much as 10% if the stated uses continues. Use rates and use times could see minor changes over the elevated level reached in 2011. Infrastructure development is not critical from a strategic point of view. However maintenance and improvement of our developed amenities is at the top of the list of the three things that were defined as “must be done”. Our infrastructure resources should therefore be focused on maintenance and improvement as opposed to developing more infrastructure to accommodate greater growth and use.

Maintain our natural resources:

Must do #2

Fire prevention: Critical issue # 2

Protect water supply: Critical issue #3

Bank erosion: Critical issue #4

Recommendations to the Board of Directors

Given the above rationale the following suggestions are made:

The Natural Resources Committee should continue its comprehensive study and review and submit its report. The report should include at least the following three sections, and a plan of action developed for each section: **fire prevention, bank erosion, and long term forest sustainability**. Wild life was specifically noted by twenty percent of owners as an important characteristic, and may be considered part of the previously mentioned “ambience” or “natural resource.” If wildlife is addressed by the NRC it could be a fourth section of the comprehensive report.

In the survey responses, the fourth of the five issues listed as “critical” is “protect our water supply.” The water supply at Hartstene Pointe is of major importance to the property owners, the HPMA and the Hartstene Pointe Water-Sewer District. The District is considering the possibility of establishing a Water Board with representatives of the District and the Hartstene Pointe Maintenance Association that will facilitate

Final for review

communication of issues important to both entities and will provide an appropriate channel to research and discuss methods of protecting the water supply.

Communication Plan for the NRC report

Recommendations for owner review, comment and input:

1. **Make the** entire Natural Resources plan **available** for community review, by posting it in club house and on the website.
2. Conduct a facilitated review and discussion of the plan with the community.
3. Following community review and comment, revise the plan and propose an implementation plan.
4. Include time lines and sequencing for implementation of each activity.

Develop sufficient funding:

Pivotal issue #1

Must do''#3,

Critical issue # 4

Rationale

Although owners expressed a desire for improvement of amenities, the data suggest that the **current level of use of the Pointe will likely be stable or increase slightly over the next ten years**, and will not require extensive new development.

Recommendations to the Board of Directors:

1. Maintain the **primary fiscal objective to manage within the current funding parameters:** three percent annual increase in the budget, and use of the current approval process.
2. **Require a set aside for long range planning as a percentage of the budget** that can be exceeded but not decreased. The set aside should be based on the best actuarial calculations available to HPMA.
3. Employ project-specific, temporary funding such as special assessments, grants, in-kind donations (materials and labor) to fund projects that are outside the reach of the long range planning budget.
4. In order to manage within current revenue generation boundaries, **develop a list of descending priorities** that includes work, maintenance activities, and amenities that will be the basis for reductions and eliminations as adjustments to revenue in the event of shortfall. **Send this list to all owners for review and adjustment; include the finalized list as a formal part of the review and approval of the annual budget. To provide a**

stable list of priorities, the period of “approval” should be multi-year (for example, a minimum of three and a maximum of five years).

4. Give further **study and consideration to the issue of health care** coverage for employees. This issue ranked number five of the “suggestions for the future”. At this time, the provisions in the federal health care law are uncertain in terms coverage, cost to consumers, timing and requirements. Providing employee health benefits could prove difficult for controlling costs over time.. If the BOD considers some form of employee health funding, an option might be a “**contribution to premiums**” so that employees can purchase their own insurance.

5. Making improvements to our amenities is important to many owners and it is likely that groups with energy will spearhead ideas. It is important that they also consider methods of funding, since the 3% annual budget increase will not likely allow for much expansion.

6. It is obvious that there are differences of opinion amongst owners regarding what are the needs and how to address them. Interestingly, these differences do not seem to be related to their characteristics. There seems to be little differences between the attitudes of full and part time owners, or between those with lots, built homes, or Island Houses.

Recommendations for the future

Development

Three improvement projects surfaced strongly: High tech communications, improved food preparation space and increased meeting space in the clubhouse.

High tech, high-speed communication capacity.

This was the most mentioned of the desires for development. While it did not surface as ‘critical’ or as a ‘must do’ it was the second highest expressed desire by 75% of respondents. Efforts to acquire this service have not been successful to date. Success will probably require a more formal sustained effort.

Recommendation: Although this is not technically a HPMA responsibility, the Board of Directors could institute or encourage an organized sustained effort in the pursuit of this objective.

Food preparation space: There seems to be some momentum, energy, organization, ideas and leadership for the improvement of the food preparation space.

Recommendation: The BOD should solicit from those most interested a formal proposal for review and consideration. The proposal should include a cost benefit analysis.

Meeting space

The configuration of the existing space limits the number and particularly the type of simultaneous uses of the club house.

Recommendation: Consider the meeting and food preparation space projects either as one project or as two contiguous projects. One logical expansion of meeting/activity space would include the walkway and the gazebo which adjoins the existing kitchen wall.

Management: Rental Policy

The survey data suggest that the number of homes used as rentals could dramatically increase in the future. While approximately 4% (16) of owners now rent their properties, the survey data indicates that in the next ten years this could reach approximately 10% (40). Another 20% (80) of the owners indicate that they might rent their properties or are not sure. No distinction was made between short term and long term rentals. Given the community's concern about the potential disproportional impact on amenities that short-term rentals might have on our facilities, this issue could have a major impact on the maintenance and repair budget. There may also be valuation and insurance issues associated with the ratio of rentals to non-rentals.

In the next ten years, do you anticipate that you might:	YES	NO	MAYBE	DON'T KNOW
Rent your property	10.3	69.2	10.8	9.7

Management: Communications

Owners were asked their preference for receiving communications from HPMA. E-mail is by far the choice of the majority of home-owners who responded to the survey. It also appears to be the easiest and cheapest way for HPMA to communicate.

Recommendation: We recommend that **HPMA continue to encourage owners to share their e-mail addresses** with HPMA for the purposes of cost reduction, speed and efficiency of communicating.

Funding Legal Activity

A concern raised in the focus groups and in the survey's written comments was the history and likelihood of the use of litigation in the resolution of differences. Given the most recent expenditures, it is likely that the allocation for legal services is insufficient. An inadequate fund for legal services requires diverting funds from other tasks, functions and/or activities. Diverting funds makes rational planning and resource management very difficult, if not impossible. Delaying or foregoing functions and activities could mean an increased cost, given inflation, timing, availability of services and materials.

Recommendation

- 1) **Fund this line item above the current allocation level** and treat it as as an **expected cost of doing business**.
- 2) The case-by-case litigation costs to owners as well as the frequency and nature of legal events **should be made transparent**.

Suggestion For The Future: Issues that are not “critical” or “must do now” but could be acted on in the near future.

Three other issues, Health care, high tech communication, and rentals have been addressed earlier in this document. Others that were included in the questionnaire were:

- Governance
- Activities for children
- Coffee shop/convenience store

In response to the question :What one thing would make it easier to make other changes at Hartstene Pointe, governance was rated number 2. Matching the most appropriate governance and management structures and functions to current needs by updating the CC&Rs and Rules and Regulations to reflect the current status of the Pointe would increase the likelihood of completing other tasks.

Organized activities for children, especially teens, should be encouraged. The current group, organized by the youth, appears to have provided the teens with activities that have meaning for the youth and are useful to the Pointe. If this youth organization still functions it should be supported. If it no longer exists a new one should be encouraged.

Approximately one-third of the Hartstene Pointe owners wanted a coffee shop or convenience store at the Pointe. This is not a high priority to the majority of the owners.

Final for review

Community values

The planning process did not include a formal exercise to generate a value statement. The following accord has been drafted in an attempt to capture the sense and sentiment of the values owners of Hartstene Pointe have about their commitment to retaining a sense of community as they were expressed in the focus groups and survey comments.

Recommendation

Adopt this accord (or something like it) as a means of expressing and soliciting commitment to the underlying values and beliefs of the community.

The following has been drafted in an attempt to capture the thoughts and sentiments of the owners of Hartstene Point about their sense of community: See Appendix 1, The Hartstene Pointe Community Accord.

Appendix I

THE HARTSTENE POINTE COMMUNITY ACCORD A Covenant of Conciliation and Commitment

This accord is an affirmation of this the community's acknowledgement of the principle of enlightened self interest and, by its acceptance, demonstrates the community's commitment to work in partnership **for the common good.**

We, the members of this community, have come together in a spirit of good will and with a felt responsibility and respect to and for each other and our environment. Our voices are many and varied, our backgrounds unique, and our interests diverse.

We both acknowledge and appreciate our difference yet embrace the kind of compromise that allows us to speak primarily as one voice. We are motivated by a shared conviction to address the pressing needs of our community, and we are inspired by mutual respect and the understanding that only through concerted, collective actions can we continue to enjoy the quality of life afforded us at Hartstene Pointe.

Our community has a proud history that we pledge to preserve. We acknowledge and thank those who served in the past – those who nurtured and preserved our unique resources and carried out the day to day business required of industry – attending to the fiscal management, roads, trees, beaches, marinas, water supply, our safety, and all other amenities both natural and constructed. To those who serve and will serve we offer our praise and thanksgiving.

Our community has an even brighter and more vital future. A future grounded in respect for the work of the past, focused on meeting the critical needs of the present, and illuminated by a clear vision of a healthy and well maintained Hartstene Pointe of the future. We know that success depends on finding common causes for actions, charting the paths together, and working in partnership to tap the rich creativity, knowledge and wisdom of our citizenry.

Towards this end, we the owner's citizens Hartstene Pointe, put forth this *Covenant of Conciliation* to aid us in the realization of the current and future visions of our community.

In doing so, we chose conciliation over discord. We chose the long-term common good over short term self interest. We pledge to resolve our differences and solve our problems, and to move from awareness to action. We commit ourselves – our time, energy and resources toward the attainment of a future filled with tranquility and enjoyment for all members our community for generations to come.

Appendix II - Survey Questionnaire

Hartstene Pointe Strategic Planning Questionnaire

In this survey, we invite you to give us your opinions about critical issues facing Hartstene Pointe. We ask that each household complete one survey.

The Strategic Planning process consists of three Steps.

Step 1. The purpose of Strategic Planning Step 1 was to identify issues that are critical for Hartstene Pointe. Focus groups were made up of committee chairs, past board members, present board members and staff. The focus group questions were also mailed to a random sample of non-resident owners.

Step 2. **In this, the Second Step of the Planning Process, we are requesting the participation of all owners. Owners can agree or disagree with the concerns that have been identified by participating owners in Step 1. Owners can add their own preferences and comments are encouraged.**

Step 3. The Third step will target the priorities identified by you the owners as the most critical or strategic. A Planning Exercise will consist of groups of owners who will develop plans to address the issues. The specifics on this process will be given to you as soon as they are finalized.

If you have access to a computer, we ask that you complete the survey on line, using the link, <https://www.surveymonkey.com/s/XSTJ6J7>. You can also access this link on the Hartstene Pointe website. Filling out the questionnaire on line is easy and it will eliminate postage.

If you have questions, please contact JoAnn Ray at 360-432-3405 or Joe Bell at 360-427-0535.

So let's get started!

1. Who are we? For Strategic Planning purposes, it is important to have a definition of who we are now and who we might be in 2020.

Do you agree with the following Step 1: **participant's assumptions?**

1. Strongly Agree
2. Agree
3. Disagree
4. Strongly Disagree
5. Undecided, unsure, or no opinion - (If Undecided or unsure, please comment)

_____ assumption: The proportion of full time owners is approximately 25%, and part-time recreational owners make up the remaining 75% of the community.

_____ assumption: A majority of the full time owners are retired.

_____ assumption: The 25%-75% part time to full time owners is likely to remain as such over the next ten years.

_____ assumption: The population of Hartstene Pointe will become younger in the next ten years due to turn over in ownership and /or younger members of the families of existing owners becoming the primary users of their property.

2. What do you think Hartstene Pointe will be like in the next ten years? Do you agree or disagree with the Step 1 participating owner's visions.

- 1 = Strongly Agree
- 2 = Agree
- 3 = Disagree
- 4 = Strongly Disagree
- 8 = Undecided, unsure, or no opinion - (If Undecided or unsure, please comment)

_____ Owners will continue to build new homes and upgrade existing homes/cabins.

_____ The Pointe's built amenities and facilities will be in decline because necessary up-keep, development and upgrading is not possible at current revenue levels from home owner assessments, fees, grants, gifts and in-kind, etc.

_____ The Pointe will successfully manage and retain its forested ambiance and continue to attract wildlife.

_____ The physical environment and ambiance of Hartstene Pointe will make it an even more desirable place to live in ten years.

_____ By maintaining the environment, the Pointe will increase in value as the rest of Mason county and other surrounding areas build out.

3. Listed below are characteristics of the Pointe that participating owners stated were important to them. Those with a * were among the top five selected by Step 1 participating owners. There are six items asterisked because of ties. **What do you think are the five most important characteristics/amenities at Hartstene Pointe?** (Select up to 5)

- Forested environment *
- Wildlife
- Views
- Quiet, peaceful relaxed life style *
- Outdoor recreation opportunities (Puget Sound, boating, fishing beaches, etc.) *
- Developed amenities (Clubhouse, pool, spa, tennis courts, exercise room, trails, etc.) *
- Feeling of safety, gate
- Feeling of friendly, helpful community *
- Social opportunities
- Family retreat
- Helpful staff *
- Other (please specify)

4. Step 1 participating owners made suggestions for the future. What additions or improvements would you want in the next ten to twenty years?

- 1 = Strongly Agree
- 2 = Agree
- 3 = Disagree
- 4 = Strongly Disagree
- 8 = Undecided, unsure, or no opinion - (If Undecided or unsure, please comment)

- Improve infrastructure (roads, gate, water-sewer system)
- Health benefits for staff
- Improve/expand developed amenities (clubhouse, pool, spa, exercise room trails tennis courts, etc.)
- Regulate vacation rentals
- Activities for teens
- Addition of small businesses such as a coffee shop or convenience store
- State of the art high tech communications (cable, broadband, mobile)

Optional services, not to be provided by HPMA, that owners could contract for which would help residents remain in their homes for a longer time. Please check those items that you would consider.

- Shared transportation
- Cleaning
- Clean-up and minor property maintenance
- Equipment/tool pools
- Personal assistance
- Other (please specify)
- Other (please specify)
- Other (please specify)

5. The following were identified by Step 1 participating owners as **issues critical to the viability and sustainability of Hartstene Pointe**. Those with a * were the **five** most frequently mentioned issues. **What do you think are the most critical issues facing Hartstene Pointe?** (you may select **up to five**).

- Maintenance/improvement of developed amenities and infrastructure *
- Improvement of communications technology
- Security
- Fire prevention *
- Management of forest for long-term sustainability
- Bank erosion *
- Protect water supply
- Develop sufficient funding *
- Recruit, retain qualified staff
- Governance type, structure, and/or processes*
- Other

6. The Step 1 participating owners were asked which three items were considered “must dos”, I.e. those things that absolutely have to be addressed. Those with an * were the most frequently mentioned items. There are four asterisks because of ties. What do you think are **three “must dos”** for Hartstene Pointe? (Please select up to **three** issues)

- Maintain developed amenities *
- Maintain/sustain natural resources with a focus on bank erosion, forest health, and fire prevention *
- Repair water/sewer systems
- Recruit and retain qualified staff
- Develop sufficient funding *
- Re-examine governance type, structure, and or processes*
- Other

Final for review

7. Step 1 participating owners were asked which **one change would have the most impact on making it easier to address other critical issues**. The following two changes emerged. (The * notes the issue most frequently mentioned). Do you agree or disagree that these issues are pivotal?

1 = Strongly Agree

2 = Agree

3 = Disagree

4 = Strongly Disagree

8 = Undecided, unsure, or no opinion - (If Undecided or unsure, please comment)

_____ Generating sufficient revenue *

_____ Matching the most appropriate governing and managing structures and functions to current needs.

_____ Other

8. The following are questions about you and your property that will help us in our strategic planning.

A. What property do you own at the Pointe? *(Please list number(s) of each)*

1. _____ Undeveloped lot
2. _____ Developed lot—residence
3. _____ Island house

B. If you own a developed lot or an Island House, is it your *(Check all that apply)*

1. ___ Primary residence
2. ___ Second/vacation home
3. ___ Rental
4. ___ Other _____
9. ___ Not applicable

C. _____ If you own an undeveloped lot at the Pointe, the primary purpose is:
(Please select one.)

1. Eventually build on the lot
 2. Buffer
 3. Investment/resale
- _____ March
_____ April
_____ May
_____ June
_____ July
_____ August
_____ September
_____ October
_____ November
_____ December

Final for review

G. What ages are your “family” who live with you and/or share visits with you at the Pointe? *Please check each category that applies.*

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Preschool (0-5) | <input type="checkbox"/> 18-29 |
| <input type="checkbox"/> Grade School (6-12) | <input type="checkbox"/> 30-54 |
| <input type="checkbox"/> Middle and High School (13-18) | <input type="checkbox"/> 55 and over |

H. In the next ten years, do you anticipate that you might:

Please answer each of the next questions with: 1 Yes 2 No 3 Maybe 4 Don't know

- Build
- Remodel
- Sell your property
- Pass on to children
- Rent your property
- Other

I. What is the best way to communicate Hartstene Pointe business to you?

Please rank the items giving the best way a “1”, the next best way a “2” and so on.

- E-mail from the Hartstene Pointe Association
- Mail from the Hartstene Pointe Association
- Hartstene Pointe Website
- Newsletter from the Hartstene Pointe Association
- Other (Please specify) _____

J. How would you like your Newsletter delivered?

- Mail
- Web
- E-mail