

2024

SIPOA Strategic Plan and SWOT Assessment

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Introduction

The Seabrook Island community is idyllic in many ways and has a complex governance structure of which our Property Owner Association (SIPOA) is a part. The framework of our organization is provided by the SIPOA Protective Covenants (our Constitution) and Bylaws. These documents lay the foundation for effective governance and our economic and environmental sustainability.

There are three separate and distinct entities on Seabrook Island.

1. SIPOA. The “Planned Development District” (PDD) of Seabrook Island was initially approved by the Charleston County Council in 1971. The original PDD called for 1200–1600 single family homesites with 1400-1600 multi-family residences. In 1972, the Articles of Incorporation for SIPOA were filed. SIPOA is a 501C4 non-profit association governed by a 12-member Board of Directors that provides municipal-type services and association governance for properties within the Seabrook Island Development (SID). Facilities include the Lake House, Community Center, Gatehouse, Admin Building and Maintenance Area, plus roadways, stormwater drainage systems, common property, etc.
2. The Town of Seabrook Island (TOSI) is a municipality governed by a Mayor and Town Council. TOSI’s jurisdiction includes areas within the Town boundaries including areas both inside and outside the gate. The Town was incorporated in 1987 which allowed for important changes from the past: it created TOSI’s ability to enact its own zoning and design standards, wresting control from Charleston County, and put an end to the then-developer’s County-approved plan to build high-rise structures along Seabrook Island Road. Incorporation also shut down commercial development behind the gate. TOSI’s 2019 Comprehensive Plan calls for 1537 single family homes and 1690 single family attached and multi-family residences.
3. The first beach club, the Seabrook Island Beach and Cabana Club (1973/74) was created for private membership. . Now known as the Seabrook Island Club (SIC), it is a private club (mutual benefit non-profit corporation) which is governed by a Board of Governors. Seabrook Island Real Estate (SIRE) is a wholly owned subsidiary of the Club. Club facilities include golf, Racquet Club, Equestrian, Island House, Ocean Terrace, Beach Club and the Real Estate office. The 2006 Island One referendum amending the SIPOA Restrictive Covenants required all new property purchasers on Seabrook Island, (unless grandfathered) to become members of SIC. Most, but not all, Property Owners are members of the Club.

This Strategic Plan addresses the long-term goals and objectives of SIPOA, as distinct from TOSI and SIC. SIPOA's Covenants specify responsibilities for ensuring the economic vibrancy of the organization, maintaining a secure community, protection of the natural environment, acquisition and preservation of green space, and the maintenance of our infrastructure. Article II, §2.3 of the SIPOA Bylaws defines the purpose of SIPOA, and the document further defines how the organization will be governed. The SIPOA Board of Directors has the responsibility to define community policies, rules and regulations, take action for the mutual benefit of Property Owners and SIPOA, and support strategic objectives.

For all of its existence, the residents of Seabrook Island have valued Seabrook Island's natural beauty and have always had a strong impetus to preserve and renew its environment. In 2017, reflecting this strong environmental orientation, SIPOA became the first private community in South Carolina and the sixth worldwide to be certified as an Audubon International Sustainable Community. To become certified, communities must develop and implement management practices and policies according to a community-driven Long-Term Sustainability Plan (LTSP) based on *3 Essentials* - economic vitality, a healthy local environment, and quality of life. The plan has timelines and measurable goals addressing 14 focus areas, including wildlife conservation, habitat enhancement, energy conservation, sustainable practices and health/wellness/education. SIPOA demonstrated achievement of many of the goals and earned recertification from Audubon International in 2020. As a Sustainable Community, SIPOA continues to make decisions and plans based on the *3 Essentials*.

One of the unique and most prized elements of the Seabrook Island environment is our beautiful beach. In 2016, the American Shore and Beach Preservation Association (ASBPA) named Seabrook Island as one of the nation's best restored beaches. There are three main reasons for beach restoration:

- **Storm protection** – A wide sandy beach helps separate storm waves from upland structures and infrastructure and remains the best protection from encroaching seas and storm driven waves.
- **Habitat restoration** – Numerous species rely on wide, healthy beaches as a place to live, feed, rest and nest.
- **Recreation** – America's beaches are its largest national park with visitor volume more than 40% higher than the number of visitors to all our federal, state parks and theme parks combined. Beaches are the leading US tourist destination for both national and international visitors. Beaches generate \$225 billion/year for the national economy (2020).

According to ASBPA officials, "The Seabrook Island restoration project clearly demonstrates the importance of developing a *long-term management plan* that works with the natural processes to overcome severe erosion." This project shows that a beach restoration can be successful in a dynamic environment if you clearly understand the coastal processes and develop a *plan* that works with the coastal processes to achieve the restoration of the beach."

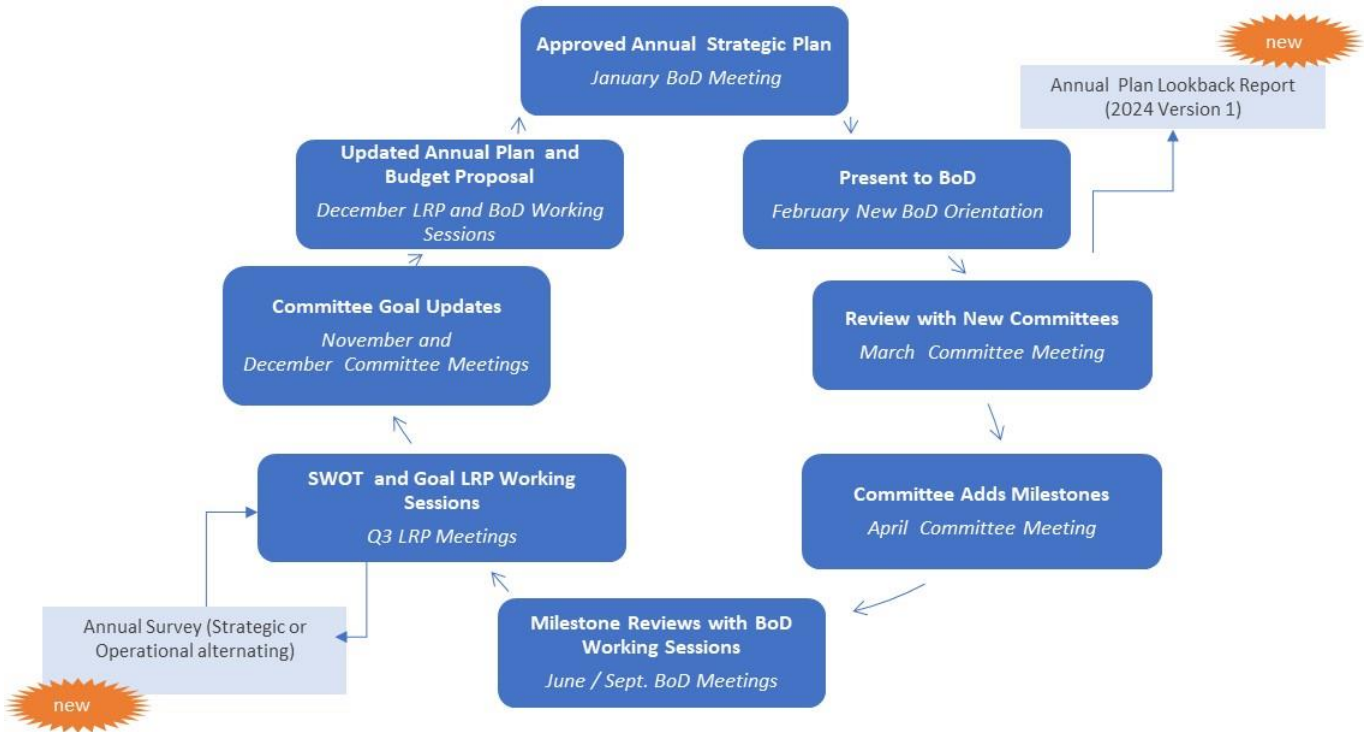
Input from Property Owners consistently shows that the natural environment remains a major reason for their purchase of property on Seabrook Island. Also, the maintenance of the natural environment is a contributing factor to the economic vitality of our community. Recognition by the Audubon International and ASBPA indicates that SIPOA maintains a planning process that respects who we are and continues to move us in a positive direction for the future.

Further validation of our focus on the three "Essentials" (see below) is given by SIPOA's designation as a "Blue Ribbon Community" by the Community Associations Institute (CAI). This CAI program recognizes

communities that develop and maintain standards, encourage community participation, maintain fiscal stability and positively impact quality of life for residents.

SIPOA’s Strategic Plan defines the long-term goals and objectives (10+ years) set by the SIPOA Board of Directors (BoD), Standing Committees, and the SIPOA Administrative Staff. Each of these strategic goals has been incorporated into the Plan by SIPOA’s Long Range Planning Committee (LRP) and approved by the SIPOA Board of Directors. Figure 1 below summarizes the SIPOA Strategic Planning lifecycle as supported by the Long-Range Planning Committee as of the 2024 Strategic Plan:

Figure 1.



In parallel to the LRP lifecycle, the annual SIPOA operating and capital budget incorporates inputs from the standing SIPOA Committees and Administrative Staff and is aligned with Strategic Plan Goals. Once the operating budget is approved by the Seabrook Island Property Owners at SIPOA’s Annual Meeting, the SIPOA Staff is responsible for executing the Operational Plan during the year.

Strategic Plan Drivers and SWOT

SIPOA Vision Statement Approved by the SIPOA Board of Directors in December 2021.

To be an idyllic ocean-front environment where neighbors collaborate to sustain and renew our island’s natural beauty and experience a wonderful quality of life.

SIPOA Mission Statement

SIPOA will strive to preserve property values and to enhance the quality of life for SIPOA Property Owners and their guests by:

- *Providing for sustained economic vibrancy of the organization*
- *Being proactive stewards of the natural environment*
- *Ensuring a secure and architecturally attractive community*
- *Constructing and maintaining high quality infrastructure, facilities and amenities*
- *Striving for excellence in all operations*
- *Maintaining a culture of professionalism and open communications*

The 3 Essentials for Sustainability on Seabrook Island (The 3 Essentials mirror the 3 Pillars of Sustainability for an Audubon International Certified Sustainable Community)

- I. Quality of Life
- II. Healthy Local Environment
- III. Economic Vitality

The Strategic Goals themselves flow from the SIPOA Vision Statement, Mission Statement, 3 Essentials and data gathered from Property Owners (see Appendix 4 - Data Gathering). The achievement of some is not wholly within the purview of SIPOA. Where it is not possible to unilateral action, SIPOA works with other stakeholders, like the Seabrook Island Club (SIC), and the Town of Seabrook Island (TOSI). can, SIPOA generates solutions, action plans, contingency plans or, at very least, closely monitors important issues that are beyond our control.

SWOT Analysis

The LRP has organized the external and internal forces which could impact the vision and mission of SIPOA into strengths, weakness, opportunities, and threats (SWOT) assessment.

Appendix 1 provides additional background on the SWOT framework which is commonly used by organizations as a tool for strategic planning. This framework will be updated by LRP at least annually as part of the strategic planning lifecycle.

Appendix 2 provides the updated 2024 SWOT analysis considered in the development of this Strategic Plan. The SWOT was updated by the Long-range Planning and Committee and reviewed in the December Board working session.



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2024 SIPOA Strategic Goals / Responsibilities and Milestones

This section of the Strategic Plan identifies the key long-term goals that the Standing Committees and the Board have approved for this year's Strategic Plan update. Each Strategic Goal is accompanied by an assignment of responsibility – where there is shared responsibility the “Lead” Committee or entity is identified. Each Strategic Goal has been rated in terms of importance – i.e., STRATEGIC, HIGH or MEDIUM.

Each Goal contains a Context statement describing the background and rationale behind the Goal and Milestones that clearly identify targets for achievement during the next 1-2 years. These Milestones represent steps along the path to Goal achievement and provide a means for ongoing measurement of progress. All the Milestones are prepared and implemented by the Responsible Committee with support as indicated from other Committees and the SIPOA Board.

The timeframe for each Strategic Goal is variable – a Goal may be completed in a single year, or it may continue for multiple years. Some of the Goals from prior years' plans have been completed and replaced with new Goals. Other Goals remain intact as they were or have been continued with some modification. The management of the Milestones is a shared one between the SIPOA Committees, the SIPOA Board, and SIPOA Administration. The operational work of our organization is with the SIPOA Administration. The oversight and management of the long-term vision is with SIPOA Standing Committees and the SIPOA Board through the Policy Based Governance structure.

Strategic Goals for the 2024 Strategic Plan

The Strategic Goals are presented below in order of rated Importance – Strategic/High/Medium.

GOAL #1: Continue to invest in comprehensive flooding and drainage management

CONTEXT: The biggest ongoing issue facing Seabrook Island is flooding and its associated flooding mitigation efforts. The ongoing rehabilitation of the existing drainage infrastructure and the infrastructure improvements proposed in the 2019 Drainage Study will be considered, approved and funded based on input from our GOMC Lead and our advisors.

IMPORTANCE: Strategic Importance

RESPONSIBILITY: GOMC (Lead); Finance and Environmental

MILESTONES:

1. Remediation of Pump Station #2 to be completed by the 2nd quarter of 2024. Project is fully defined in the 2023/2024 capital budget, the contractor contract approved by the Board in October 2023, and work started with the selected contractor in late 2023.
2. Others TBD

GOAL #2: Coordinate with our advisors and regulators on beach restoration and renourishment programs

CONTEXT: Our beach is our most important natural resource and SIPOA is the general steward for coordinating beach restoration and renourishment as recommended by our coastal beach area advisors. These programs require detailed assessments, planning, State agency and Army Corp of Engineers approvals, as well as capital planning.

IMPORTANCE: Strategic Importance

RESPONSIBILITY: GOMC (Lead); Environmental, Legal, Finance, and coordination with the Town of Seabrook Island (TOSI)

MILESTONES:

1. TBD by GOMC

GOAL #3: Improve the safety of our shared roads

CONTEXT: SIPOA continues to concentrate on increased safety risks due to a greater number of vehicles, bikes, ebikes, LSVs, joggers, and pedestrians on our shared roads and paths.

The “Share the Road” blueprint and plan is SIPOA’s response to the property owner’s desire for enhanced safety on our private roads while recognizing that adding significant paths is not possible with our road easements limitations.

IMPORTANCE: Strategic Importance

RESPONSIBILITY: GOMC (Lead); Safety and Security, and Liaisons from Town of Seabrook Island (TOSI) and the Club (SIC)

MILESTONES:

1. TBD by GOMC

GOAL #4: Identify and assess the property value impacts due to cost increases of property ownership and renovation on our Island

CONTEXT: Property owners have experienced increased costs due to rising insurance rates, cost of materials and other inflationary pressures. The Finance Committee will:

- Identify and assess the property value impacts due to rising insurance rates, flood zone building codes, re-build labor and material costs, and other on-going routine cost increases
- Model the risks (across the various property types) of the economic effects of inflation and cost increases of property ownership and communicate a shared understanding of the risks to SIPOA stakeholders
- Develop leading practices recommendations to help mitigate the risks

IMPORTANCE: Strategic Importance

RESPONSIBILITY: Finance (Lead), LRP, and GOMC

MILESTONES:

1. TBD by Finance Committee

GOAL #5: Develop a long-range master plan for SIPOA-owned amenities and the facilities that support amenities

CONTEXT: A master plan establishes the framework for the prudent maintenance and growth of all our facilities and amenities. The master plan will evaluate the current state of the SIPOA-owned facilities and amenities, and including:

- Current capacity/utilization/structural analysis
- Property owner input from a structured survey
- Revenue sources and operating cost analysis,
- Facility and amenity upgrade options (good-better-best) for property owner comment
- Business case for property owner comment

IMPORTANCE: High Importance

RESPONSIBILITY: Long Range Planning (Lead), Activities, GOMC, and Finance

MILESTONES:

1. Property Owner Survey Cycle by end of April 2024

GOAL #6: Improve and maintain existing safe beach access (to and from) for all Seabrook Island residents and guests.

CONTEXT: Normal beach changes, as well as beyond normal changes due to storm events, have presented challenges to beach access across the island. Where feasible, consistent with prioritizing the integrity and

preservation of sand dunes and the beach proper, beach access should be wheelchair accessible where possible, and equipped with shower stations.

IMPORTANCE: High Importance

RESPONSIBILITY: GOMC (Lead), Safety and Security

MILESTONES:

1. TBD by GOMC

GOAL #7: Continue to implement the plan to preserve and enhance the wildlife habitat (aquatic and terrestrial)

CONTEXT: SIPOA will continue to coordinate with the Seabrook Island Greenspace Conservancy (SIGSC) and the North American Land Trust (NATL) in their respective efforts to bring more property under green space protection and steward natural resources through innovative land preservation. This goal aligns with our commitment to being a sustainable community and fostering the well-being and diversity of habitat on the Island.

IMPORTANCE: High Importance

RESPONSIBILITY: Environmental Committee

MILESTONES:

1. TBD by Environmental Committee

GOAL #8: Manage native wildlife species by striving for appropriate predator / prey ratios using such approaches as habitat modification and improvements

CONTEXT: Surveys of Seabrook Island's property owners and visitors consistently show a high degree of appreciation for our natural attributes - our flora and fauna. A healthy, well-balanced wildlife population requires a healthy habitat. Unfortunately, this habitat shrinks as property is developed, so it is critical that we professionally manage that which remains. We must monitor the vitality of our wildlife population and habitat and recommend

IMPORTANCE: High Importance

RESPONSIBILITY: Environmental Committee

MILESTONES:

1. TBD by Environmental Committee

What is a SWOT analysis?

12/19/2022

- SWOT analysis is a framework for identifying and analyzing an organization's strengths, weaknesses, opportunities and threats.
- The primary goal of SWOT analysis is to increase awareness of the top-down factors that go into establishing a strategic plan.
- To do this, SWOT analyzes the internal and external environment and the “helpful and harmful” factors that can impact an organization’s mission and it’s plans

Internal	Strengths - Helpful What are the reasons property owners choose and then stay on SBI?	Weaknesses - Harmful What are property owners’ pain points and SIPOA related shortcomings?
	Opportunities - Helpful What are opportunities to improve the quality of life and property values on the island ?	Threats - Harmful What are risk areas that could impact the quality of life and property values on the island ?
External		

Appendix 2 – 2024 SWOT Analysis

The LRP has organized the external and internal forces which could impact the vision and mission of SIPOA into strengths, weakness, opportunity and threats (SWOT) assessment. This diagnostic is updated annually by the LRP and reviewed with the Board of Directors. The SWOT is translated into the goals of the strategic plan or aligned to the SIPOA operational plans.

Appendix 1 provides additional background on the SWOT framework which is commonly used by organizations as a tool for strategic planning. This framework will be updated by LRP at least annually as part of the strategic planning lifecycle.

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • Natural environment: beaches, trees, wildlife, marshes, ponds and creeks • Strong income, fund balances and reserves • Sense of Community • SIPOA policy-based governance model • SIPOA owned amenities for Property Owners and their guests • High quality and proactive infrastructure management 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Safety risks increase with a greater number of vehicles, bikes, ebikes, LSVs, joggers, and pedestrians on our shared roads and paths • Aging Oyster Catcher Community Center, • Capacity/Utilization of Lake House Facility • Inconsistent volunteer and property owner engagement on significant projects • Property Owner expressing dis-satisfaction with the Architecture Review Committee (ARC) practices and communications
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Coordination of facilities and nature areas long-range planning with TOSI and the Club • Greater coordination with the SIGSC to acquire more undeveloped lots for conservation • Strengthen working relationships with Kiawah Island and Charleston Country representatives • Increase regime/HOA awareness of their long-range planning considerations and available planning resources • Re-establish property owner trust on facilities planning • Working with NALT on innovative environmental projects 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • Increased flooding potential and storm impacts, such as beach erosion, stressed further from climate change impacts • Invasive plants, trees, and animals • Economic effects due to rising insurance, flood zone building codes, re-build labor and material costs, and other owner costs • Increasing costs of planned road repaving and beach renourishment • Storm damage repairs to infrastructure/roads • Effects of catastrophic storm on assessment collections

Appendix 3 - Data Gathering

Data Gathering remains an important and essential activity of the Long-Range Planning (LRP) Committee. To ensure that SIPOA is responsive to the needs of the community and continues to move in a positive direction, data must be collected and evaluated. The Data Gathering and Analysis Subcommittee of the LRP has been charged with these activities. The following plan helps to ensure that information is gathered from as many varied groups on Seabrook Island as possible. However, single-issue surveys can be conducted at any time to gather needed information for the Board and/or any SIPOA committee.

The 2024 LRP Committee recommended a revised approach to biennial data gathering from the property owners: Splitting the Survey into a Biennial Strategy Survey and a Biennial Operations Survey. This split will start in 2024 with a Strategic Survey LRP Committee working with the Activities Committee which represents the SIPOA-provided amenities. The data gathering will now occur annually, alternating each year going forward between strategic and operational scope of questions as defined below.

Calendar	2024	2025	2026	2027
Survey Scope	Strategic	Operational	Strategic	Operational
Lead	LRP	Admintration	LRP	Admintration