

# Kelly Greens Golf and Country Club Space Needs Planning & Space Allocation Study

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# Kelly Greens Golf & Country Club

## SPACE NEEDS PLANNING AND SPACE ALLOCATION STUDY

### Executive Summery

#### Introduction

The Administrative Space Needs Planning and Space Allocation Study included a determination of existing facility utilization and a quantitative evaluation of built space on the Kelly Greens Golf & Country Club Campus in comparison with recognized space standards. An identification of space needs was made in relation to existing facilities at the base year of Fall 2005. The consultant applied the space standards to observed and collected data provided by on site visits and interviews to establish guideline space needs. The following space determinations scenarios for program and administration space reallocation were assembled to inform the physical plant planning effort. The results of this analysis are described in the body of this report along with office and multipurpose utilization and explanation of the space guidelines applied.

The purpose of this study was to accomplish the following:

- Identify and define existing and future space needs for the administration of the entire facility
- Provide a framework for developing a comprehensive master plan for any necessary expansion to the existing facilities

## **Planning Process and Assumptions**

The analysis was performed using a facilities inventory that included the buildings that now exist on the site. The facility inventory was assembled by the staff and board and given to the consultant at the beginning of this study.

The consultant then conducted 13 interviews with staff, board members and members to determine job responsibilities, storage requirements, access to files, needs for meeting space and the need for privacy.

Following the collection of the data on site a secondary research effort was undertaken to establish industry standards and benchmarks for the specific use occurring at the site.

## **Key Findings**

The outcome of this analysis identifies space surpluses and deficits when compared to existing facilities and national standards. Existing space for office/conference rooms is about 400 square feet short of nationally accepted bench marks. Physical plant maintenance and storage is well below the nationally accepted standards. It is clear the flexible meeting space available for owners, members, and guest is not sufficient to meet the needs during season. It is also recommended the board directs staff to bring in an Information System (IS) expert to review your computer system. You need to develop a separate area for your clients to come in the office with out disturbing all your employees.

## Background

### History

Kelly Greens Golf and Country Club is located at the crossroads to the beaches of Fort Myers, Sanibel, and Captiva. The community's amenities consist of an 18 hole championship golf course, tennis courts, swimming pool, exercise facility, and clubhouse all of which are owned equally by the 939 units which include a variety of condominium homes, land condo single family, and independent single family homes. The consultant estimates there are approximately 250 units occupied year-round.

Kelly Greens Golf course construction started in October of 1987. The course opened to general play January 1, 1989. The Kelly Greens Clubhouse opened July 19, 1988, and Kelly Greens' first residents moved into their new home on December 23, 1987.

In 1999, owners enthusiastically supported a special assessment and a 3.5 million dollar renovation was undertaken on the golf course, clubhouse, pro shop, cart barn, activities center, etc. A key element in the golf course renovation was building all greens to USGA specifications.

In 2003, owners approved a plan to buy back the internal roads from Lee County. This culminated in the installation of gates and the initial operation of a gate monitoring system in November, 2004.

Kelly Greens has an active Long-Range Planning Committee and they are currently considering other plans to further improve the community. As a result

of some initial plans for expansion of facilities the Board decided to hire BJM Consulting, Inc. to help them determine if such an effort was necessary.

### **Scope of Services**

Based on meetings with representatives of Kelly Greens, BJM Consulting, Inc. has developed the following scope of services:

#### For Existing Facilities

- Task 1:** Interview employees to determine the scope of services they provide to the organization and their space needs
- Task 2:** Conduct a site visit of all existing space and review its use to determine if it is the most efficient and effective use of the area
- Task 3:** Interview Board members and a sample of the general membership to ascertain their impressions of the present space allocations and gather other ideas regarding the future needs of the organization
- Task 4:** Research industry standards to discover “bench marks” and “best practices” in the area of staffing and space allocation needs for similar organizations

Based on the scope of services BJM Consulting was engaged on September 30, 2005.

## Data Collection

### Facility Inventory

In preparation for drafting this report the consultant conducted an onsite visit of the campus and determined the following.

At the present time the administration, dining room, and facility management offices exist within the club house, pro shop and associated buildings. The five administrative offices share approximately 808+/- square feet. Six employees presently use these offices. This area also houses mailboxes for staff and board members, and a copying center where the following operations are carried out: copying, laminating, faxing, paper shredding, paper cutting, hole punching, credit card processing and poster assembly.

There is a small storage area behind the kitchen and three food service managers share two offices adjacent to this storage area. This area was designed for storage of nonperishable supplies for the dining room and kitchen. It is presently also the location for membership files, the Pitney Bowes mail machine and work table, storage bins for club records, a golf cart for house keeping/chief engineer along with their equipment and supplies.

The Activity Center is a multipurpose room that connects to the Pro Shop. This space functions as a meeting room, card room, aerobics room, library, computer lab, and storage area.

## **Facility Inventory continued**

The PMR building is approximately 440 square feet of office space. It is currently being used as a realtor's office and work shop for the chief engineer. It is our understanding that the space being used by the real estate company will become available early in 2006.

We understand that there are other storage facilities both on and off site associated with the needs of the chief engineer and his staff.

## **Interviews**

The consultant conducted 13 interviews with staff, board members and members to gather information concerning the needs of the employees along with the impressions of the board and members. The following information was gathered during the interviews.

### Staff Interviews

All six administrative employees and one dining room employee were interviewed, their collective responses were as follows: seven needed file storage, five needed access to organization files, five meet with board members, all seven have interaction with owners, members, and guest, three have contact with the public, six meet with other employees, six believe they have a need for privacy at times, three have need of a conference room.

The following are other comments received during the staff interviews. The consultant takes no position towards these items as being true or factual and includes them in this report for the client's information only.

- Understaffed – during season
- Constant interruptions
- Not professional especially when it comes to customer service which they feel it is not the best, especially during peak season.
- Wish they had a little bit more desk area space!
- Need conference room for changes to employee benefits (they just did this recently to discuss benefits with insurance agent)
- They would love to have a conference room other than the private dinner room (PDR)
- Believes they are under staffed especially during season
- There is no staff back up and for the four years they have been here they have not been able to take off any Mondays or Fridays
- They have not taken a full week off since they have been here and management does not want you to take time off during season
- They have neck & back problems because the way the office is situated
- The desks are not suitable for computers
- Just for the sheer enjoyment of being able to hear because the owners, tenants will stand at the desk and talk,
- Board gathers around desk because the mail is back there
- Someone always is in area copying, using the paper cutter, fax machine



## Staff Interviews Continued

- The restaurant needs their own person to develop all their collateral material, menu etc. especially during season
- 3% increase on salary and 15% increase on insurance “does not think they can do this much longer” plus their responsibilities have grown
- The location of the computer server is a good and bad thing
- They utilizes the PDR for other activity
- Tight back by the copier – it is hard to get back there to make a copy or send a fax.
- There have been occasions when they cannot find things because storage is scattered, they use a lot of time running around to find items and sometimes this causes them to double buy because they cannot find a certain items
- There were no records as of six years ago
- We need a succession plan to replace the general manager
- Need space for an assistance general manager to learn the ropes before they replace the existing general manager
- Three management companies are not doing their job and staff has to take up the slack
- Present health club is not big enough
- Heath inspector has told them about employees eating in the kitchen due to an absent of a break room
- No meeting rooms for members and guests

### **Staff Interviews Continued**

- No room for a service bar
- Liquor storage area is too small
- They are presently using half the storage area for the kitchen and dining room, they should be using the entire area
- Everybody has to use part of their offices for storage
- There is no locker room for employees and only one unisex bathroom for the dining room and kitchen staff
- Dining room closet is being used to house computers, community closed circuit TV and storage of the audio visual equipment
- There is no room for linen storage

### **Board and Member Interviews**

On two occasions the consultant interviewed board members and members. The following are other comments received during the interviews. The consultant takes no position towards these items as being true or factual and includes them in this report for the client's information only.

- There is a nine member board that meets once a month
- 14 committees meet once a month consisting of between 120 to 130 members on them
- Need a conference room for committee meetings
- They have adhoc committees from time to time
- Activity Center is fulfilling these needs to date, social and recreational uses fill the facility during the season

- Existing spaces that are being used for meeting and conference space will not be available during the season
- The computer club need its own storage space
- Need a separate room for all social functions
- Present staffing levels are not sufficient
- General Manager needs an assistant
- Need a private room where transfer paper can be signed
- Staff needs a break room
- Need to separate reception area from office area
- Communications/Newsletter is not read members and they call staff for dates and time of events
- Staff need to maximize the utilization of their space
- All computers need to be networked
- A single printer can serve the local area network
- An electronic filing system needs to be used to eliminate the need for so much storage of documents
- Furniture is to big, the use of modular office equipment would free up additional space
- The facilities are what they were when everyone bought their property, they all knew what they were getting
- The workout center needs help
- More effort should be put into the upkeep of the golf course

### **Board and Member Interviews continued.**

- Restaurant needs to be open more for dinners and not just hotdogs at the turn
- Need to install computer for members to use in office to eliminate need for staff to do so much data entry
- Staff needs to keep data base current, there is no need for two mailings going to one unit owner
- There are only 100 units that are year-round residents
- We need a efficient facility, but we do not have to wow anyone
- Need to put as much of the communications on line as possible, i.e. newsletter and directory
- Need to lease all new necessary computer hardware

## Research

### Office Space

The guideline application for office space needs is based on major categories of staff and application of space amounts for office service and conference space needs. This information was gathered from a national association of work space professionals.

The consultant then placed each individual into a major category shown in this table.

<u>Employee Type</u>	<u>Office ASF</u>
General Manager	200
Asst General Manager	180
Controller	160
Club Manager (2)	140
Asst Controller	140
Administrative Assistant	130
Chief Engineer	130
Receptionist	120

### Physical Plant

Most guidelines suggest a percentage of from five to eight percent of all square footage on site, with the exception of existing physical plant space, be used to drive master plan needs in this category. The consultant has found in most cases that this percentage generates greater amounts of space than typically exists on site. Many physical plant departments are increasing the outsourcing of many typical shop functions and using just-in-time purchasing methods to decrease warehousing needs. The consultant has applied 6% of all square footage on site, with the exception of existing physical plant to drive needs for space in this category.

### Number of Administrative FTE's

Using the Club Managers Associations of America/National Club Association's Report on the 2004 Operations and Financial Data Survey we find the following national benchmarks for administrative FTE for a club with Kelly Greens amenities and more than 900 members.

<u>F/T FTE's</u>	<u>P/T FTE's</u>	<u>Seasonal P/T FTE's</u>	<u>Seasonal P/T FTE's</u>
12	2	5	2

FTE = Full Time Employee

P/T = Part Time

## Summary of Findings

### Existing Space

#### Office/ Conference Room Space

The existing space for the administration of Kelly Greens is about 400 square feet short of nationally accepted bench marks for office and conference room space. The administrative staff is also well below the national average for clubs its size.

It is also clear with the combination of 26 condo associations, 5 homeowner associations and the administration of one master association, the work load of these individuals is reaching a breaking point and additional staff will soon be required to offset low moral and continuous service hours.

Therefore based on the interviews with the staff and board members along with the research on national standards it is recommended additional space be found for the administrative functions of Kelly Greens.

#### Physical Plant Maintenance and Storage

Once again based on the national benchmarks for this area it is recommended when the PMR building becomes available it is retrofitted for proper office space for Facility Management/Housekeeping and the remaining area is used for storage. This should remove all the non-dinning room and kitchen storage out of the area behind the kitchen and free up the necessary space for their needs.

### Other Recommendations

It is clear the flexible meeting space available for owners, members, and guest is not sufficient to meet the needs during season. This issue should be taken up by the board of directors when looking at the need to upgrade/expand the health club facility.

It is also recommended the board directs staff to bring in an Information System (IS) expert to review your computer system. You should be able to scan all the paper files stacked around the offices into a data base where they would be available to the staff members who need them without having to leave their desks. The IS expert could also review your local area network and probably eliminate some of the hardware you presently have. This would also go a long way to free up some space for other uses. The board should also recommend full training courses so employees of Kelly Greens are comfortable with the new technology and are able to use it efficiently.

One of the other uses you need to develop is a separate area for your clients to come in the office with out disturbing all your employees. In a half hour period of observing your front office there were 18 interruptions from walk-ins. Some of these events caused interruptions to multiple employees. This does not make for a productive workplace.

It is the belief of the consultant by following these very conservative recommendations Kelly Greens administration can become more efficient and effective in servicing their owners, members and guest while improving employee satisfaction through the establishment of a healthier work environment.