

CITY OF HORSESHOE BAY



2016 COMPREHENSIVE REPORT

Executive Summary

In 2015, the City of Horseshoe Bay created a Long Range Planning Advisory Committee (LRPAC) tasked with updating the City's Comprehensive Plan. The LRPAC began the process by researching and developing information on Horseshoe Bay's demographics, relationships with other organizations, local ordinances and other processes, as well as the existing Comprehensive Plan. The LRPAC nearly 100 interviews with local individuals who were identified as stakeholders, community leaders, and citizens that had unique insight into Horseshoe Bay and were able to identify challenges and opportunities facing the City that needed to be addressed in the plan. The next step was to expand the public engagement to provide an opportunity for all citizens to participate through a Community Survey that was conducted resulting in nearly 1,400 responses providing clear insight into community priorities. This effort is to ensure the City fulfills its Mission Statement:

'To serve and protect our citizens while preserving our heritage and Planning Advisory for our future.'

Using the interviews and survey results, a series of goals were developed to address the challenges identified. These goals were the basis for two Open House meetings, where over 150 citizens had the opportunity to review the draft goals, identify any missing goals, and prioritize them. The results from the Open Houses, in conjunction with additional feedback from the Long Range Planning Advisory Committee, resulted in the final goals and priorities presented below. There are twenty three (23) Plan Goals divided into five (5) broad topics including:

- Infrastructure and Technology – issues related to broadband internet and water
- Land Use – issues related to future development, zoning, and transportation
- Economic Development – issues related to growing and diversifying the local economy
- Environment – issues related to Lake LBJ, recycling, tree health

- Community Services – issues related to parks and recreation, community appearance, and quality of life

The goals below are prioritized, ranging from Highest to Lowest priority. The Implementation Guide includes the detailed action plan to support identified goals.

High Priority Goals

- Expand broadband internet access and cellular coverage
- Review and update Zoning and Subdivision Ordinances
- Identify areas most suitable for new commercial and retail development
- Ensure high standards for code enforcement, development standards, and common area landscaping
- Support the addition of a center lane on FM 2147
- Provide additional public recreational amenities
- Protect the environmental health and integrity of Lake LBJ
- Manage economic growth tailored to HSB's unique demographics and characteristics
- Be proactive in water conservation and management

Mid Priority Goals

- Be proactive in monitoring and addressing deteriorating buildings
- Adopt a city residential and commercial construction drainage ordinance
- Develop a Tree Ordinance to protect tree health and community appearance
- Develop short term rental policy
- Provide resources for ACC compliance and enforcement
- Explore options for additional connection to SH 71
- Expand community outreach and education
- Explore alternative funding sources
- Protect and enhance community appearance

Low Priority Goals

- Support the development of a bridge below Wirtz Dam

- Support senior housing options
- Explore options to determine the best use for undeveloped lots
- Become a leader in efficient recycling and waste management services
- Review and update the Annexation Plan

Demographic Summary

Horseshoe Bay is unique because it began as a resort destination. This has resulted in a population that is much older and with higher incomes than is found in many similar sized communities. Home prices also reflect this characteristic, being much higher than the surrounding areas.

The current full-time population is estimated to be 3,749; however, it is important to include the part-time population of approximately 3,000 more that spend significant time in Horseshoe Bay. In addition, the large number of visitors means the City has to provide facilities and services for a much larger population during peak summer season than necessary for the full-time population. Horseshoe Bay's high quality of life, amenities, and location mean it can expect continued steady growth into the future. The City is fortunate to have a high number of vacant residential lots and available land that can accommodate expected growth for the foreseeable future.

Horseshoe Bay is primarily a resort and retirement community, and this is reflected in the high property values and incomes of citizens. The median home value in Horseshoe Bay is \$264,600 while the average value of all improved property is \$486,368. Median income is \$82,072, which is an indication that a family making the median income can afford a home in Horseshoe Bay. Existing development in and around Horseshoe Bay, as well as planned development in proximity, provide a range of housing options to serve citizens at a variety of income levels.

The median age in Horseshoe Bay is 61.7 and over 40 percent of the population is over 65. This population tends to put more demands on public safety services. In addition, these citizens may be considering downsizing their homes to reduce maintenance costs and other challenges. The opening of the Scott and White Hospital supplements needed medical services in the area, and a planned senior

housing development will provide housing options more suitable for older citizens.

Horseshoe Bay is a community with a very high quality of life and amenities that benefit current citizens and make it an attractive destination for future citizens. The Plan provides a thorough discussion of each goal, why it is included, and further information to support the recommendations. This summary provides basic information to anyone interested in the Comprehensive Plan and why it is so important, without having to read the entire document.

Infrastructure and Technology Goal

Another very high priority issue is access to high speed internet throughout Horseshoe Bay. This issue received the most attention from participants in the public engagement process. There are a number of ways to address this challenge, and the City should appoint a 'Technology Committee' to explore all options. Horseshoe Bay has many retired executives and business people that have the knowledge and resources to tackle this, and these should be leveraged to take ownership of finding the best solution. The City should engage with this committee and support the findings of the committee's process and needed action should begin immediately, with the committee maintained for the long term.

Land Use Goals

The land use goals are directly related to issues of how Horseshoe Bay should grow, where new development is most appropriate, and how to provide for growth while protecting neighborhood integrity and quality of life. Community appearance was a key issue identified in the public engagement process. There is a role for the City, the Resort, the Architectural Control Committees (ACC's), and the Property Owners' Associations (POA's) to maintain and enhance the appearance of Horseshoe Bay. It will be important for all these entities to maintain a high level of communication and coordination to ensure appearance is maintained. Key issues include ensuring the ACC's are consistent in the application of design standards and in ensuring compliance with approved standards as construction occurs.

The Long Range Planning Advisory Committee has identified updating the Zoning and Subdivision ordinances as one of the primary action items to undertake once the plan is adopted. There are several areas currently zoned for commercial and multi-family uses that may allow for development that is incompatible with existing single family development adjacent to these properties. The Conceptual Future Land Use map (Figure 1) was developed to provide a vision for future development that promotes community values and goals. This can be the starting point for revising the development ordinances to ensure future development is orderly and beneficial to Horseshoe Bay. The City has effectively protected the area around the current City Limits through development agreements and other tools; it will be important to monitor these and plan for future annexation in the long term.

Many of the buildings in Horseshoe Bay were built over 40 years ago and are beginning to show signs of deterioration. This is especially an issue in properties that are rented out by the owner or owned by part-time citizens. It will be important for the City to proactively pursue a high level of code enforcement to address these issues since they will escalate in the future.

Finally, transportation improvements are an important part of future land use. Goals include developing additional access into Horseshoe Bay through a bridge below Wirtz Dam and an additional connection to Hwy 71. The bridge is really outside of City control; however, there is a role for the City to advocate for development of this project. The second access point to Hwy 71 would provide additional sites for retail and commercial development and promote public safety in the event of a major incident blocking the current intersection. There are several existing emergency access and gated connections that may be suitable for development into a full access intersection. All options should be explored to provide this additional connection. A turn lane on FM 2147 would enhance safety and accessibility and the City should continue to work with TXDOT to implement this.

Implementing the goals from the Land Use section will promote quality development in Horseshoe Bay that protect the high quality of life and property values of current citizens.

Economic Development Goals

Horseshoe Bay has always been a destination and continues to rely on the Resort as the primary basis for the local economy. This has contributed to a situation where there are very limited options for retail and restaurant outlets, despite the high income of the area. Citizens expressed an interest in expanding economic opportunity in Horseshoe Bay, primarily with retail and restaurant options, but also with additional employment opportunities. Often, communities will create an Economic Development Corporation to take the lead in these activities, typically funded through a portion of the sales tax. Horseshoe Bay does not have additional sales tax capacity, and there is no need for this approach. What is appropriate is the creation of an Economic Development Committee, leveraging the experience and expertise of community citizens, that can take ownership of pursuing economic opportunities and lead the effort to expand and diversify Horseshoe Bay's economy while protecting community values and quality of life.

There is also the issue of ensuring adequate funding for needed City services as Horseshoe Bay grows. The City already applies for grants and other funding it is eligible for to help offset costs for needed equipment and facilities but these activities may be supplemented by retention of grant consultants. It may also be appropriate to explore additional revenue sources such as a hotel / motel tax and others that can be utilized to fund the expansion of services as desired by citizens.

Environment Goals

Environmental amenities are one of the key attractions of Horseshoe Bay, and protecting the environment is a high priority for citizens. Community appearance has been discussed in the land use section, but there are additional opportunities to protect and enhance community appearance. This includes the development of 'gateway' features at key intersections. The Resort and Property Owners' Associations maintain these features at the entryway to some neighborhoods; however, there may be opportunities for additional features at other key intersections and locations.

Protecting water quality and quantity is vital to promote future development, including managing runoff from development. It is important to establish

standards that ensure future development does not impact adjoining properties or the community at large. The City should also continue to work with LCRA and other entities to protect the quality of Lake LBJ, which is one of the primary attractions for Horseshoe Bay, in addition to being the drinking water source. Water conservation is also important to ensure long term water availability to support continued growth. This includes supporting rainwater harvesting and exploring options for emergency water sources if the need arises.

Citizens expressed an interest in the availability of recycling services. There is a collection center that takes household recycling, but it is not currently available as a curbside service. The City can work with the solid waste provider to determine the costs of adding this service, and inform citizens of the costs to provide this. Because of the high number of part-time residents, the cost of curbside recycling service may be prohibitive. It will be up to citizens to determine if the desire for curbside recycling is worth the additional cost for service.

Tree health is a key component to community appearance and mature trees contribute to property values. There is a need to establish an ordinance to protect the health and vitality of local trees. This is not intended to be an onerous ordinance that inhibits property owners from maintaining their property, instead it sets standards for the timing of pruning activities that can negatively affect tree health as well as requirements for action when tree disease is discovered. The goal is to ensure that the valuable resource of large, native trees is protected over time to maintain community appearance and property values.

Community Service Goals

While about 70% of Horseshoe Bay citizens are Resort members and have ready access to recreational amenities, non-members have had very limited recreational facilities. The City has developed a Parks Plan that provides clear direction for addressing this issue and this plan should be more widely disseminated, reviewed, and appropriate projects implemented. In addition, there is an opportunity for the development of a park between Highland Dr. and Clayton Nolen Dr. on property fronting FM 2147. This would be an opportunity to create a gateway feature into Horseshoe Bay and an amenity for current and future citizens to enjoy.

An issue that is beginning to arise is with short term rentals. Many properties are no longer owner occupied and are being used for short term rentals for summer visitors. It will be important to establish a policy that protects property owners' rights to utilize their property while also minimizing the potential negative impacts from this type of use. Many communities have addressed this issue, so the City can research best practices and develop a policy that is appropriate for Horseshoe Bay.

Finally, it is important to keep citizens informed and aware of activities that may impact them. There is a Communications Committee that has been established and this group could be tasked with this effort. Every avenue of communication should be leveraged including City, POA, and Resort websites, social media, local newspapers, and others. While there is no guarantee that people will pay attention, it is important to make every effort to keep citizens informed and be able to say that every effort to inform them was made.

Conclusion

Horseshoe Bay is reaching a transition point. While the Resort has served as the foundation for the community historically, the City has grown to a point where it is appropriate to begin diversifying the local economy and services offered to citizens. This Plan provides goals and objectives related to challenges and opportunities identified through the public engagement process. There are opportunities for many participants to participate in the implementation activities and it should not be left solely to City government to implement. This summary provides an overview of the entire plan and can be used in conjunction with the Implementation Guide as the basic elements of the plan. The rest of the document expands on this summary, giving additional background and information to support the goals and objectives.

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Introduction

Horseshoe Bay is a unique community located on Lake Lyndon B. Johnson on the border of Llano and Burnet Counties. The community began in the early 1970's with land acquisition by cousins Norman and Wayne Hurd who developed it as an upscale retirement community with a private club and some rental units. It included many amenities featuring three golf courses and two dining facilities. Home sites were developed for full-time and part-time citizens, and many of the homes remain in use as seasonal or vacation homes today. The City incorporated in 2005, and now has a Home Rule city government that provides services to citizens.

The planning process began with the appointment of a Long Range Planning Committee (LRPC) in 2015. This Committee was tasked with reviewing and updating the City's existing comprehensive plan. They have been hard at work for over a year, conducting public engagement, developing initial goals, and revising the plan to reflect the priorities of Horseshoe Bay citizens. These citizens have worked very hard over this time and provided excellent service to their community. Their insight, wisdom, and experience ensure that the adopted comprehensive plan update will provide a clear framework for decision making and prepare Horseshoe Bay to remain a successful, attractive community for years to come.

Public Engagement

The LRPC conducted nearly 100 interviews with local 'movers and shakers' as the first community input activity. These individuals were identified community leaders and citizens that had unique insight into Horseshoe Bay and were able to identify challenges and opportunities facing the City that needed to be addressed in the plan. From these interviews, the LRPC developed an initial set of plan goals that served to guide the remaining engagement process.

The next step was a community-wide survey. This was conducted in the spring of 2016, and had nearly 1,400 responses. The survey was available on-line and as hard copies to ensure everyone had an opportunity to participate. Full-time citizens made up approximately 68% of respondents, with part-timers making up

the remainder. Resort members were 75% of the respondents. The beauty of the area and the clean environment were key attractions for why people chose to live in Horseshoe Bay, this is reflected in many of the plan goals that prioritize maintaining and enhancing the environment. Over 90% of respondents indicated a need for better high speed internet, which became a high priority goal for this plan. Other issues identified in the survey include the desire for more recreational amenities, transportation improvements, economic diversity, and continued protection of community appearance. The full survey report can be found in Appendix A.

The survey responses were in line with the findings from the interview process, indicating that the interviewees represented the community's interests. The survey results were used to further refine the draft goals, which were then presented to the public through two Open Houses.

The two Open Houses were an opportunity for citizens to review the proposed draft goals, identify any gaps and missing issues, and prioritize the goals through a voting process. Approximately 160 citizens participated in the two meetings, which may not seem like a high count, but is a very good turnout for this type of meeting. Participants were given 5 dots they could use to vote for the issues they believed to be the most important. LRPC members were at the meeting to clarify any issues and answer any questions, along with City Staff. The results of the voting were used to prioritize the goals for this plan. Those priorities are summarized in the Executive Summary and reflected in the timelines of the Implementation Guide.

In addition to the survey and Open Houses, a Land Use Workshop was conducted to help create a vision for future development in Horseshoe Bay. This meeting was attended by many in the real estate and land development business. The draft map they created was further revised by the LRPC members to better reflect community values and priorities. This map is found in the Land Use section and can serve as the basis for revising the Zoning Ordinance, which is another high priority goal identified in the plan.

Plan Development

Using the public engagement input, the LRPC worked closely with a consultant hired by the City to develop the comprehensive plan update. The plan includes a Demographic Analysis that describes existing characteristics of the Horseshoe Bay population as well as expectations for the future. It has five sections to organize the various goals including:

- Infrastructure / Technology
- Land Use
- Economic Development
- Environment
- Community Services

Implementing the identified goals will ensure the City lives up to its **Mission Statement:**

‘To serve and protect our citizens while preserving our heritage and planning for our future.’

The last section is the Implementation Guide. This is the most important part of the plan because it provides the detailed actions to achieve the identified goals. The Guide contains specific action steps, timelines, and responsible parties for each goal, as well as potential barriers, cost estimates, and funding sources. This is the section of the plan that can drive action.

Implementation

It is important to recognize that adopting the plan is really just the beginning of the process, implementation is where the real work begins. It will be important that City Council identify a plan champion, an individual or group that will serve as custodian of the plan and ensure that those responsible for action are using it to guide their decision making and implementation is moving forward. This is not just a plan for City action, there are many opportunities for citizens to get involved. It is vital that citizens stay involved in this process and ensure that the plan becomes a working document, used to help determine where resources are allocated and where attention is focused. Without that engagement, this plan will

not provide the meaningful change that Horseshoe Bay citizens have indicated they want to see through their participation in this planning process. It is important that the plan be incorporated into the regular decision making process of the Planning and Zoning Commission and City Council, as well as other organizations. It is also vital that the plan be reviewed semi-annually, especially during the budget process to ensure timelines are being achieved and goals met. The plan should also have a thorough review and update every five years. As the implementation progresses, the City should celebrate its success and acknowledge the work that is being done via social media, news stories, and other avenues so citizens can stay informed of progress and accomplishments.

Demographic Analysis

Population Estimates and Projections

Horseshoe Bay has seen steady growth since its incorporation. Its prime location and high quality of life make it an attractive destination for new citizens. Many of these citizens are retired, retiring, or reaching a stage in their careers where they can work remotely. Many others own property in the City but are part-time citizens. They live and work elsewhere, but maintain a residence in Horseshoe Bay for extended visits, typically with the intention of becoming full-time citizens upon retirement. Resort membership provides amenities and activities for these citizens, while the resort also serves as a vacation destination for visiting families.

It is important to recognize that the population estimates are based on the best available data at the time they are made. Recent annexations and new developments may result in estimates being inaccurate. Horseshoe Bay also has the challenge of a large number of part-time citizens which can make accurate estimates more difficult. The estimates provided in this plan are based on ESRI Business Analyst, a web-based demographic tool that is commonly used by residential and commercial realtors, as well as business location specialists and others. Because of the wide acceptance of ESRI estimates, they represent the most practical solution because any prospective business wanting to locate in Horseshoe Bay will likely be using this data. This means that there will be less questioning of population estimates than if another source was used, such as a local calculation to get a population estimate. When Census data is released, it will be important to revisit the demographic data to update with official numbers based on Census results. For internal population estimates, the City utilizes the number of water meters, which is a common tool used by cities. This provides a way to track population growth as meters are installed with new development.

The Plan projects that Horseshoe Bay can expect approximately 2-3% annual residential growth over the Plan horizon of five to ten years. Because of the large number of vacant lots in existing subdivisions, most growth will occur in areas already served with infrastructure. The Texas Water Development Board also shows continued steady growth through 2030. This steady rate of growth gives the City

ample opportunity to expand services in a cost effective and efficient manner to serve growing needs without having to deal with the rapid growth seen in other Central Texas communities.

Table 1 – Population Estimate and Projection

	2010 Census	2015 (est.)	2020 (ESRI Business Analyst)	2030 (TWDB)	2030 (Texas State Data Center)
Horseshoe Bay	3,418	<u>Full-time</u> 3,749	<u>Full-time</u> 4,164	<u>Full-time</u> 4,802	
Llano County	19,301	21,043	23,133	22,453	19,269
Burnet County	42,750	45,841	49,502	64,268	52,700

Source: ESRI Business Analyst, Texas Water Development Board, Texas State Data Center. City Data

Llano County overall is expected to grow much more slowly, and some projections show a decline in population over time. This is not expected to affect Horseshoe Bay because of its proximity to more rapidly growing Burnet County and Marble Falls, as well as the Resort amenities that attract citizens to the City. Proximity to the rapidly growing Austin metropolitan region will also drive continued growth in the area. It is important to note that these are projections and, as such, may not reflect what actually happens. It will be important to track population change over time and respond appropriately, rather than relying only on estimates.

Population Characteristics

As mentioned, Horseshoe Bay is an attractive community for older citizens, with a median age of 61.7 years. The community survey conducted during the planning process had 1,369 responses and showed the median age of full-time resident respondents was 66 years, while part-time was 60 years. This may be an indication of the fact that many part-time citizens are still in the workforce and may transition to full-time status at retirement.

Less than 12 percent of Horseshoe Bay’s population is 19 years or younger, and there is no school in the City. Students either travel to Llano or Marble Falls for school. This may become an issue over time as the City seeks to expand its retail

and service businesses, as families that might work in those jobs choose to live elsewhere for proximity to schools.

Over 40 percent of Horseshoe Bay’s population is over 65 years. This reflects the identity of the community as a resort and retirement destination. This does tend to create a greater need for public services, including emergency response. The opening of the new hospital has improved access to healthcare and emergency care for citizens and will add to the attractiveness of Horseshoe Bay. Another challenge of an aging population is access to services for those unable to drive. As Horseshoe Bay continues to age, opportunities for transit should be explored to provide citizens with options beyond the automobile. Housing demand may also change with an aging population as citizens choose to downsize from current homes to smaller properties with lower maintenance. A new senior housing facility is planned that will serve some of this expected demand in the future.

Table 2 – Age

	Horseshoe Bay	Llano County	Burnet County
0-4	2.9%	4.0%	5.5%
5-9	3.2%	4.1%	5.9%
10-14	3.0%	4.5%	6.3%
15-19	2.7%	4.0%	6.0%
20-24	2.3%	3.5%	5.7%
25-34	6.3%	7.2%	10.7%
35-44	6.4%	7.9%	10.7%
45-54	10.0%	11.7%	13.1%
55-64	21.3%	19.2%	15.2%
65-74	25.2%	19.9%	12.2%
75-84	12.9%	10.3%	6.3%
85+	3.9%	3.9%	2.3%
Median Age	61.7	56.8	44.2

Source: ESRI Business Analyst

Horseshoe Bay has a very small minority population, with less than 1/3 the percentage of Hispanics found in Texas as a whole (37%).

Table 3 – Race and Ethnicity

	Horseshoe Bay	Llano County	Burnet County
White	92.0%	92.8%	86.7%
Black	1.0%	1.3%	2.3%
American Indian	0.4%	0.8%	0.8%
Asian	1.0%	0.6%	0.6%
Pacific Islander	0.1%	0.0%	0.1%
Some Other Race	3.9%	2.6%	7.4%
Two or More Races	1.6%	1.7%	2.1%
Hispanic (Any Race)	11.2%	9.9%	22.3%

Source: ESRI Business Analyst

The adult citizens of Horseshoe Bay have high educational attainment. Over 75 percent of adults have at least some college, an Associates, Bachelors or Graduate degree. This is a reflection of Horseshoe Bay as a high end retirement and resort destination. People move to Horseshoe Bay to retire from a successful career, or have a professional career that allows them the freedom to work from home. This would not be possible without high educational achievement.

Table 4 – Educational Attainment Age 25+

	Horseshoe Bay
HS Grad / GED	24.3%
Some College	37.1%
Bachelors Degree	25.1%
Graduate Degree	13.5%
Total Higher Ed	75.7%

Source: ESRI Business Analyst

Income and Employment

The income of Horseshoe Bay reflects the high educational attainment of the citizens. Horseshoe Bay has a much higher median income than Llano and Burnet Counties. Nearly 70 percent of employment is professional, white collar jobs. Only 12 percent of citizens are engaged in the service industry, this is likely due to the high cost of living in Horseshoe Bay. Many employees of service businesses in Horseshoe Bay likely live in surrounding cities or in unincorporated areas where housing is much less expensive.

Table 5 – Household Income

	Horseshoe Bay	Llano County	Burnet County
<\$15,000	6.0%	12.1%	10.0%
\$15,000-\$24,999	4.6%	11.2%	9.6%
\$25,000-\$34,999	4.6%	9.1%	9.1%
\$35,000-\$49,999	9.1%	14.9%	10.8%
\$50,000-\$74,999	21.1%	18.9%	22.6%
\$75,000-\$99,999	13.2%	10.3%	14.6%
\$100,000-\$149,999	13.3%	11.4%	12.3%
\$150,000-\$199,999	12.2%	5.4%	6.4%
\$200,000+	15.9%	6.6%	4.5%
Median Household	\$82,072	\$52,360	\$58,905

Source: ESRI Business Analyst

Table 6 – Employment

Occupation	Percent
Total Employed	1,192
White Collar	69.8%
Services	11.9%
Blue Collar	18.3%

Source: ESRI Business Analyst

Housing

Home prices reflect the high income of the Horseshoe Bay population. Approximately 43 percent of the homes within the City Limits are valued above

\$300,000 and the median home value is \$264,600, with an average appraised value of \$486,368 per the Central Appraisal District. This is indicative of the high quality of life that attract citizens to the area, as well as the high cost for property fronting on and having views of constant level Lake LBJ.

As shown on Table 8, approximately 27 percent of housing units (818) are valued under \$200,000, many of these are the manufactured homes found in Horseshoe Bay South as well as some of the older condominiums and smaller units in the City. These properties, along with homes in the Oak Ridge subdivision (an unincorporated area) provide some lower cost housing options in and near Horseshoe Bay. In addition, Cottonwood Shores, a city adjacent to Horseshoe Bay has a much lower median home price (approximately \$100,000) while the new Gregg Ranch development near the Scott & White Hospital will add approximately 700 new homes at a lower price point but still in proximity to Horseshoe Bay.

One of the challenges for Horseshoe Bay is managing aging properties. Many of the condominiums and some single family homes are aging and may not meet the needs of potential new citizens or downsizing retired citizens because of dated design, growing maintenance needs, and other issues. Because many of these are multifamily units, with multiple owners, redevelopment can be particularly difficult. This is one of the biggest issues facing Horseshoe Bay in the next 10 years. Another challenge is the large number of seasonal and vacation homes. Because these homes are not permanently occupied, they may not receive as much maintenance and attention as full-time occupied homes.

Table 7 – Owner Occupied Housing Values

Value	Horseshoe Bay	Llano County	Burnet County
<\$50,000	1.8%	8.5%	6.3%
\$50,000-\$99,999	9.4%	18.6%	15.4%
\$100,000-\$149,999	12.4%	20.7%	20.9%
\$150,000-\$199,999	15.0%	14.0%	17.9%
\$200,000-\$249,999	9.3%	8.4%	10.5%
\$250,000-\$299,999	7.2%	4.9%	6.4%
\$300,000-\$399,999	12.8%	7.2%	8.5%
\$400,000-\$499,999	5.6%	3.8%	4.3%
\$500,000-\$749,999	10.1%	6.4%	5.5%
\$750,000-\$999,999	5.5%	3.4%	2.5%
\$1,000,000+	10.9%	4.1%	1.8%
Median Value	\$264,600	\$157,689	\$170,715
Household Size	1.99	2.12	2.52

Source: ESRI Business Analyst

Table 8 provides an overview of the value of all the improved owner-occupied, vacant and rental properties in Horseshoe Bay.

Table 8 – Value of Improved Properties 2015

Value	# of Properties	% of Properties
<\$100,000	372	12.3%
\$100,000 - \$200,000	446	14.8%
\$200,000 - \$500,000	1,111	36.9%
\$500,000 - \$1,000,000	446	14.8%
> \$1,000,000	372	12.3%
Total Appraised Value	\$1,467,858,000	
Average Appraised Value	\$486,368	

Source: Llano and Burnet County CAD

Table 9 – Housing by Occupancy

Status	Horseshoe Bay	Llano County	Burnet County
Occupied	54.5%	63.7%	79.7%
Owner	45.0%	48.9%	58.3%
Renter	9.5%	14.8%	21.5%
Vacant	45.5%	36.3%	20.3%

Source: ESRI Business Analyst

The high percentage of vacant properties is a reflection of the large number of part-time citizens in Horseshoe Bay. As Table 10 indicates, most of the homes considered vacant are actually owned and used as seasonal homes. The detailed vacancy status data is only available from the 2010 US Census, but it is likely the patterns of use have not changed significantly since this data was collected.

Table 10 – Vacancy Status Count (2010)

Status	Horseshoe Bay	Llano County	Burnet County
For Rent	100	395	440
Rented Not Occupied	9	47	26
For Sale	199	414	449
Sold Not Occupied	17	27	50
Seasonal	1,084	3,932	2,655
Migrant Workers	0	2	5
Other (e.g. under renovation, in estate)	20	455	734

Source: US Census

Conclusion

Horseshoe Bay is a vibrant community with a very high quality of life. Citizens benefit from high education levels and high incomes. The region is expected to continue growing, but at a pace that can easily be absorbed within the existing development patterns of the City. There are a large number of vacant lots and available land that will provide space for growth.

Maintaining the high quality of life and amenities will require on-going coordination between the City, the Resort, the various POA's and citizens. It will be important for all parties to work together to maintain and enhance the amenities and services that make Horseshoe Bay such an attractive destination. There should also be attention given to diversifying Horseshoe Bay's economy away from its reliance on the Resort to ensure economic vitality for the long term and to ensure HSB as a vibrant location for all citizens.

Infrastructure / Technology

Based on the public engagement, the single biggest challenge in Horseshoe Bay is access to broadband internet and consistent cell phone access. This presents a challenge for citizens wanting to stay connected, but it also represents a challenge for economic development as high speed internet has become a fundamental need for business. Also, entrepreneurs and local professionals will benefit from the opportunity to work from home with broadband internet. Once again, the City should leverage the expertise and experience of area citizens by creating a Technology Committee that can take responsibility for this effort with the goal to:

- *Expand Broadband Internet Access and Cellular Coverage*

Infrastructure / Technology Goals

Expand Broadband Internet Access and Cellular Coverage

The first step is to understand the limitations of coverage in Horseshoe Bay by inventorying available access and speeds. The Technology Committee can lead the charge to survey citizens and businesses to understand where gaps in services are and develop an inventory to show where gaps exist. This can become the foundation for working with providers to address these gaps and find alternatives to provide service. The Committee can also reach out to providers to further understand their needs for expanding service and if further information can be provided to them to justify expanded service in the area. Horseshoe Bay is a high income area, which should make it an attractive destination for prospective providers.

Texas state law does not allow the City to become a broadband internet provider, and limits its ability to partner with providers to expand service, so it will be up to citizens to be willing to pay for expanded services to justify providers building needed infrastructure to support it. The Committee can further research this and determine, what, if any, options may be available to either lobby for changing this law, or ways that the City may be more involved since private providers are ineffective in providing this necessary service to the community.

Land Use

One of the core functions of City government is the implementation of development standards that promote quality development while protecting community values and quality of life. Horseshoe Bay is unique in that it began as a resort and many of its regulations are based on the development standards established by the initial developers. This includes a Zoning Ordinance based on the original covenants, conditions, and restrictions (CC&R's) and architectural standards that are required by Architectural Control Committees (ACC) under the auspices of the Property Owners' Associations and have been translated into Zoning regulations by the City. This structure can lead to confusion and issues of enforcement as the responsibilities for various functions lie with different entities. The City has a good relationship with the Resort and the ACC's with on-going communication and coordination that has led to Horseshoe Bay maintaining high standards for development and a high quality of life. The goals identified in this section will help to clarify responsibilities and ensure future development contributes to the economic vitality and high quality of life in Horseshoe Bay. Goals for this section include:

- *Review and update Zoning and Subdivision Ordinances to meet community goals*
- *Identify areas most suitable for new commercial and retail development*
- *Ensure high standards for code enforcement, development, and common area landscaping*
- *Support the addition of a center lane to FM 2147*
- *Proactive monitoring and addressing of deteriorating buildings*
- *Provide resources for ACC compliance and enforcement*
- *Explore options for additional connections to State Hwy 71*
- *Support the development of a bridge below Wirtz Dam*
- *Support senior housing options*
- *Explore options to determine best use of undeveloped lots*
- *Review and update annexation plan*

Land Use Goals

Review and update Zoning and Subdivision Ordinances

This goal is one of the most important identified in the plan. There are several areas or neighborhoods in town where current zoning allows for uses that are not compatible with adjoining properties, including areas zoned for commercial and / or multi-family uses in or adjacent to single family detached home neighborhoods.

There are minimum residential square footage requirements that need review to insure high community standards. For example, current regulation allows for a minimum square footage of only 750sq/ft in multi-family which is clearly too low.

Updating the Zoning and Subdivision ordinances presents an opportunity to remove those incompatibilities before new development occurs that may negatively impact existing citizen's life style and property values. It also will allow the City to promote development in areas where it is most appropriate to allow for orderly growth that supports community values. The process to update these ordinances involves additional public engagement and time, so it should be initiated quickly upon plan adoption.

Resident survey data showed a clear concern for any type of growth that was not compatible with community standards. This would certainly indicate our residents recognize HSB will grow in the future but have reservations on the type and direction of this growth and strongly feel the city and the P&Z Committee needs to take an active role in managing that growth to preserve our life style, community ambiance and heritage.

The process to update the ordinances is fairly straight forward and utilizes direction from this planning process, including the Conceptual Future Land Use Map (Figure 1). This map provides a vision for future development that supports community goals and protects community values. Best practices from other communities can be researched to inform the process and be adapted to meet local needs. The final Zoning and Subdivision Ordinances should be written to

Land Use

achieve sensible growth that protects property rights of landowners while maintaining neighborhood integrity and quality of life for all citizens.

Identify areas most suitable for new commercial and retail development

The Future Land Use Map was created based on input from a Land Use Workshop that was attended primarily by members of the real estate and development community, and revised by the Long Range Planning Committee to more accurately reflect community goals. This map identifies appropriate areas



for new development, focused on key intersections, FM 2147, and along Hwy 71 where commercial and retail development is most appropriate. This map can serve as a guide to updating the City's development ordinances.

This vision can be used as the City is working with developers and property owners to support development that meets community goals. It also allows the City to ensure development is occurring where it is most suitable and where infrastructure is available to support it. This includes water, wastewater, and streets that can be very expensive to expand and maintain. Development that is within areas already served is most cost effective for the City and provides the most benefit rather than having to add expensive infrastructure. Even if the initial cost is paid by developers, the maintenance becomes a City function with costs borne by utility ratepayers.

Ensure high standards for code enforcement, development areas, and common area landscaping

Horseshoe Bay is a resort destination and this is reflected in the strict architectural and landscaping controls on development, as well as the landscaping and appearance of the City. Oversight of this is primarily the responsibility of Architectural Control Committees for each subdivision, the Resort, and the Property Owners' Associations. The POA's install and maintain much of the landscaping throughout Horseshoe Bay, with fees paid by property owners as the primary funding source. Because this is not an area the City controls, it will be up to property owners to ensure their Property Owners' Association is utilizing its funding to properly maintain POA landscaping in each subdivision. In addition, property owners need to take responsibility for maintaining their own landscaping to promote overall community appearance.





The City has a role in maintaining vacant lots and landscaping in some public areas. The City currently uses contractors to mow vacant lots two times per year and bills property owners for the service. In addition to the mowing of vacant lots, the City must also ensure adequate maintenance of

public areas not under the responsibility of a POA or the Resort.

Support the addition of a center lane to FM 2147

There is already a center turn lane on FM 2147 for part of the way through Horseshoe Bay; however, it is not complete. FM 2147 is the major thoroughfare in town, with all traffic funneled to it from adjoining neighborhoods. Having a center turn lane through town would enhance safety for citizens and increase access to businesses along the roadway. The City should partner with Llano County to continue lobbying TXDOT to address this issue.

One solution to consider may be the City offering to pay for the improvements and to be repaid by TXDOT over time. This ‘pass-through’ funding would ensure the project happened more quickly than waiting for TXDOT funding and approval; however, it would be a significant upfront cost for the City until the money is repaid by TXDOT.

Proactive Monitoring and Addressing of Deteriorating Buildings

Many of the residential buildings in Horseshoe Bay were built 40 or more years ago and are beginning to show their age. This is especially true of properties that are no longer owner-occupied, or are owned by part-timers. These properties do not have the day-to-day oversight needed to identify and address maintenance issues before they become a larger problem. Code enforcement is a major challenge for any city because of the need to respect privacy and property rights. City inspectors cannot just enter private property to observe issues, so they are

dependent on finding things visible from the street and notification from the public.

The City has been consistent in its code enforcement role and issues are addressed as they are identified. There may be opportunities for more awareness and identification of issues. The City can work with property owners and the real estate community to educate them on the importance of code enforcement and enlist their assistance in identifying issues. Realtors are in the community regularly and have an interest in maintaining community quality so could likely participate in bringing code issues to attention. The City should also reach out to the POA's and the Resort to raise their awareness of code enforcement issues. Because these entities are already involved in maintenance and service throughout neighborhoods, they may see issues that need to be addressed through the code enforcement process. They can inform the City of potential issues that will allow the City to initiate the code enforcement process when necessary.

Code enforcement should involve more than just regulatory pressure and can incorporate a proactive way to achieve compliance. There may be an opportunity to provide voluntary assistance to property owners to maintain their homes, especially for elderly citizens unable to do work themselves. This is an opportunity for local civic organizations, churches, and others to work in the community. Community workdays can be organized where volunteers provide basic home maintenance and service to elderly and low income property owners. This may include basic repairs, landscaping, and general clean up. These types of activities have been successful in many communities and are a way to build community relationships and address code issues in a positive way.

Provide Resources for Architectural Control Committee Compliance and Enforcement

One of the attractions of Horseshoe Bay is the consistency of appearance in residential neighborhoods. These design standards are created by and part of the deed restrictions and plans are approved by Architectural Control Committees (ACC) for each subdivision. These committees are appointed by the Declarant or the Property Owners Associations and serve to ensure development meets

community standards. The City has a role to play in the process through enforcement of the design standards in the Zoning Ordinance and supporting the ACC's in their work.

There is limited opportunity for the ACC's to enforce standards without proceeding to civil litigation, while the City has some authority to stop development if standards are not met. The City also could utilize its current building inspection process to help identify compliance issues involving ACC standards and approvals in time to address them before work is completed. This would be a very sensitive issue to undertake, requiring cooperation from the Resort, POA's, and ACC's, so it should begin with discussion and outreach to determine if there may be support for this over time.

Explore options for additional connections to State Hwy 71

Horseshoe Bay is located on a farm to market road that runs from US 281 in Marble Falls to Hwy 71 on the western edge of Horseshoe Bay. Having a second intersection with Hwy 71 may provide an opportunity to support additional commercial and retail development accessible to Horseshoe Bay residents and through travelers on Hwy 71. An intersection on Hwy 71 also provides high visibility and traffic that would benefit these types of businesses.

In addition, having an alternative access point would enhance public safety in the event of a major incident that blocked the existing single access point to the highway. While not a likely scenario, it does represent an issue to consider. Because of the location of Scott & White Hospital at Hwy 71 and US 281, having an additional access point to Hwy 71 would be a major safety improvement that would provide much faster access to emergency care than the alternative route through Marble Falls should Hwy 71 be blocked east of Summit Rock entrance.

There are existing connections to Hwy 71 that are either gated or emergency access only. These sites may be suitable for development into public access connections to Hwy 71 and should be reviewed for their potential. It will be important to coordinate with property owners to have their support for any proposed route for this connection.

Support the development of a bridge below Wirtz Dam

This is a project that is largely outside the control of the City; however, there is a role for the City to advocate for this project. It will offer an alternative route between Horseshoe Bay and Marble Falls, enhancing public safety and emergency response as well as reducing traffic on FM 2147.

There are existing plans that have been developed for this project; however, TXDOT has limited funds to implement new construction. The City can partner with other entities, including Cottonwood Shores, Marble Falls, Burnet and Llano Counties, and others to support this effort and encourage TXDOT to allocate funding for this project.

Support senior housing options

Horseshoe Bay has an older population and there will be a need for additional senior housing options to allow citizens to remain in Horseshoe Bay as they age. There is a planned senior housing facility that could address some of the expected demand; however, there will likely be a need for additional facilities in the future. Because of the demographics and high income of Horseshoe Bay, it is likely that senior housing developers are already aware of the opportunities here. The City can assist by ensuring appropriate areas are identified for this type of development and adequate infrastructure and services are available to support it.

The City may also decide to take a more proactive approach to encouraging this type of development. This plan calls for the creation of an Economic Development Committee that is tasked with encouraging economic growth in Horseshoe Bay. This group could be tasked with marketing Horseshoe Bay to senior housing developers. The City may also consider supporting senior housing through the provision of utilities rather than depending on the developer to pay those costs. This can be a significant cost for new development and would be a substantial incentive if provided. The City has not done this before and it should only be considered if there is sufficient support from citizens for active City involvement in support senior housing development.

Explore options to determine best use of undeveloped lots

Horseshoe Bay has about 6,000 undeveloped lots. Many of these are in established neighborhoods and will eventually be built on with single family homes as the neighborhoods continue to develop. However, there are many in subdivisions that will not likely develop as currently platted. This is due to cost of infrastructure and other barriers.

This represents a challenge and an opportunity for Horseshoe Bay to think creatively about a potential solution for these lots.

City Staff could develop an inventory of lots unlikely to develop. This inventory can be the starting point to begin thinking of alternatives. This may include rezoning these areas for estate style development, with very large lots, maybe “cluster” style developments, and other options should be explored.

City staff is currently testing a concept near the airport off Clayton Nolen installing infrastructure to enhance lot values. If successful, this concept should be expanded,

Review and update Annexation Plan

The City recently completed an annexation process that brought additional land into the city limits. As part of this process, the City also established development agreements with many other properties adjacent to the city limits to protect the City from undesirable growth. Some of the property is covered by conservation easements that prohibit future development, while other properties have agreements that will automatically require annexation if the owners seek to develop their properties. Therefore, the City can ensure any development on these properties meets City standards. This proactive approach has positioned the City very well for the next several years. It will be important going forward to regularly review conditions and determine if an update to the Annexation Plan and policies is needed to protect the City’s interests over the long term.

Economic Development

Horseshoe Bay is a resort destination and the Resort represents the foundation of the local economy. This has been an asset to the community; however, it may also be limiting additional desirable commercial development. Citizens expressed a desire for additional retail and restaurant options in particular, while also desiring additional economic opportunities that may diversify the local economy, offer local employment opportunities, and increase the tax base. However, there is not widespread support for an aggressive economic development program that would change the fundamental character of Horseshoe Bay. Rather, there is an interest in expanding opportunity with appropriate jobs and businesses that match the existing character, desires and high standards of Horseshoe Bay. It was often expressed “We do not want to become another Lakeway”.

Residents responded to the question of future growth and development (commercial, recreational, housing etc) as shown here:

“HSB is going to grow so we need to carefully manage it.”	57.9%
“We need to support and encourage growth and development”	10.9%
“I would like to see HSB stay the way it is”	14.2%
“We need to slow down growth and development.	6.1%

Another question asked how strongly residents supported the goal of:

“Encouraging retail/commercial development consistent with community and architectural standards”

Support Very Strongly	33.55%
Support Somewhat Strongly	34.66%
Support Not Very Strongly	15.70%
Not At All	16.10%

Economic Development

This would certainly indicate our residents recognize HSB will grow in the future but have reservations on the type and direction of this growth and strongly feel the city needs to take an active role in managing that growth to preserve our life style, community ambiance and heritage.

Part of that discussion also recognized that attracting many of the residents wishes e.g. high speed internet, restaurants and appropriate retailers etc is largely dependent on how many residents (customers) are available and that will require population growth.

Many cities have an Economic Development Corporation funded by a dedicated sales tax that is tasked with economic development, while others rely on the Chamber of Commerce for this role. Horseshoe Bay has neither of these entities nor are they needed. The Resort is responsible for marketing itself and attracting visitors (a role commonly undertaken by a Chamber of Commerce) and the Horseshoe Bay Business Alliance (HSBBA) supports existing businesses. To undertake desired economic development, it is recommended that an Economic Development Committee be explored to take ownership of this role. This Committee would work with the HSBBA to support existing businesses and attract complementary new businesses. Their primary mission in conjunction with the HSBBA would be to seek and screen new business to insure they are compatible with HSBBA and community standards. Horseshoe Bay is fortunate to have many citizens with business experience and other talents that would be helpful in this work and many of them have time to serve. Goals for this section include:

- *Manage economic growth tailored to HSB's unique demographics, characteristics and needs*
- *Explore additional funding sources*

Economic Development Goals

Manage Economic Growth Tailored to HSB's Unique Demographics, Characteristics, and Needs

To begin an economic development effort, it is important to understand the market characteristics of Horseshoe Bay. Preparation of a Market Gap Analysis could provide insight into current spending patterns and where there are gaps in existing services in the community. This information can be the basis for recruiting efforts, targeting those



Businesses where demand is highest. This targeting ensures limited resources are used most effectively and, if successful, will attract businesses with the highest chance for success because of the available market for them.

Horseshoe Bay can also reach out to neighboring communities that have more active economic development programs. Because of the high incomes of Horseshoe Bay citizens, they provide an attractive market for prospective businesses. By incorporating Horseshoe Bay data into regional economic development efforts, there may be more success in luring new businesses to the area, even if not locating in Horseshoe Bay itself.



There may also be an opportunity to foster local entrepreneurship and business development rather than relying on recruitment of businesses. Again, Horseshoe Bay has a wealth of retired executives and active business owners that can become a resource for mentoring local entrepreneurs and start ups.

Identifying these resources is important, along with helping to make connections between these individuals and

those wanting to start a business locally. The Economic Development Committee can take responsibility for this effort to serve as an information clearinghouse for local, regional, state and Federal resources that can support local business development. The Business Alliance already exists to support local businesses and this organization should be a partner in any economic development efforts.

Finally, the City may consider developing an incentive policy to support desired business growth. This has not been an issue in the past, but with the interest from participants in diversifying the local economy, it may be appropriate to take this step. The starting point for this is to examine best practices from other communities; this can identify appropriate levels of incentives along with proper 'claw back' provisions and other measures to protect city interests. A local policy could then be developed that is targeted to desired businesses and is tailored to the goals and values of Horseshoe Bay.

Explore Additional Funding Sources

Horseshoe Bay has been fairly conservative in its governance and spending habits, has a very high bond rating, and a low property tax rate. Part of the reason for this is because the Resort provides many services and amenities typically provided by city government, including recreation amenities. This is beginning to change as new citizens and others desire more City facilities and services. As expectations continue to evolve, it will be important for the City to explore options to expand funding without relying solely on property taxes. Some additional revenue can be expected from growing the business community, resulting in higher sales tax revenues.

The City has been awarded grants for public safety needs and parks and should continue to research and apply for grants to help offset costs for needed equipment and facilities. Because Horseshoe Bay is a high-income community, with a low tax rate, it often does not score well on grant applications, so this may have limited success. The City may explore leveraging local volunteers to help with this effort, and for major endeavors may consider a grant consultant. These consultants often work for the administrative fee from awarded grants rather than being paid by the City. This may take pressure off City Staff and identify additional grants to pursue.

Environment



One of the most important attractions in Horseshoe Bay is its natural setting and the quality of the environment. Protecting this invaluable amenity is vital to the continued success of Horseshoe Bay. There are opportunities for many participants to engage in the effort to preserve the local environment, and activities

range from protecting water quality and quantity to protecting tree health.

The City can take a leadership role in developing policies that will ensure future development does not negatively impact existing citizens and the environment. There is also a need to engage with LCRA, Texas Parks and Wildlife, Texas Water Development Board, and others to identify environmental challenges and mitigate them before they can negatively impact health and quality of life. To do this, the following goals have been identified:

- *Protect the environmental health and integrity of Lake LBJ and the Colorado River*
- *Be proactive in water conservation and management*
- *Adopt a city residential and commercial construction drainage ordinance*
- *Develop a tree ordinance to protect tree health and community appearance*
- *Protect and enhance community appearance*
- *Become a leader in efficient recycling and waste management services*

Environment Goals

Protect the environmental health and integrity of Lake LBJ and the Colorado River

Lake LBJ is the identity of Horseshoe Bay and ensuring the quality of this asset is vital to the community. The City should continue its partnership with LCRA and other entities to ensure this asset remains unpolluted and invasive species are managed. The City should continue its work with developers and builders to



ensure development does not negatively impact the lake. This includes education about proper use of pesticides and fertilizers to ensure these do not affect water quality. Homeowners are another target for outreach and education to ensure they are also properly using fertilizers and pesticides on their lawns to keep these chemicals out of the water.

Finally, there are several goals in this plan related to City ordinances and regulations that can contribute to protecting water quality. These goals should be implemented to ensure Lake LBJ remains clean and attractive for future citizens and visitors.

Be proactive in water conservation and management

Texas recently experienced one of the worst droughts on record, which led most citizens to have new respect for the need for water conservation and management. While recent rains have ended the drought and refilled the lakes, it is only a matter of time until drought returns. It is important to maintain policies that encourage water conservation and management to ensure long term water availability.

Residential landscaping is one of the largest users of domestic water, so encouraging xeriscaping is an important way to minimize this. Xeriscape utilizes native species adapted to low water usage, and some landscaping in Horseshoe

Bay is already xeriscape. This results in lower water usage, but also lower maintenance costs over time. The City can participate by incorporating xeriscape into all City facilities and projects.



Rain Garden Runoff Feature Source: www.ParioPlan.com

Another opportunity to protect water quality and quantity is through the implementation of low impact development standards. These are policies that encourage the use of rain gardens, swales, pervious pavement, and other features to manage storm water on-site rather than building large drainage facilities to capture rainwater. These features can be low

cost and attractive parts of the landscape rather than ugly concrete boxes. The City should consider establishing a Low Impact Development policy that would codify these standards and encourage their use in new development to mitigate storm water runoff while enhancing community appearance. Resources and examples can be found at www.LowImpactDevelopment.org.

Finally, the City should explore options for one or more alternative potable water supplies in advance of a serious emergency since Lake LBJ is currently the only source. This is a long term issue that should be part of on-going water planning and discussions with LCRA and surrounding communities.

Adopt a city residential and commercial construction drainage ordinance

As development continues in Horseshoe Bay, it is important to mitigate the negative impacts, including increased storm runoff and drainage. Currently, property owners have to resort to civil actions to protect themselves if a neighboring development impacts their property. Having an established policy included in the development process will protect neighboring property owners from negative impacts of new development and serve to protect water quality from increased runoff.

The City should research other community ordinances, including the City of Lakeway, as an example of ordinances that are reasonable while offering solid protection. Using these as guidelines, the City can develop an ordinance that is appropriate for Horseshoe Bay to protect current and future citizens. Once adopted, the City could work with developers and builders to educate them on the ordinance standards and expectations. It then becomes an issue of on-going enforcement as part of the City's regular building permit and inspection process. This will protect property owners from negative impacts and help maintain the quality of Lake LBJ from additional runoff.

Develop a tree ordinance to protect tree health and community appearance

Healthy, tall trees, particularly live oaks, are an important asset in overall community appearance and are a contributor to property values. Maintaining tree health is an important community goal because of the potential impacts of tree disease. This is not recommended to be an ordinance that restricts



property owners from maintaining their trees, rather it is intended to ensure tree pruning and other activities happen at appropriate times. It also has standards for how to respond to tree disease once it is identified. The City of Lakeway ordinance is an example of one that is focused on tree health and can serve as a starting point for this work

(<https://www.lakeway-tx.gov/DocumentCenter/View/20334>).

By protecting tree health, Horseshoe Bay will protect a cherished and very valuable benefits all citizens.

Protect and enhance community appearance

This goal relates to the creation of gateway features to Horseshoe Bay that reflect community character and appearance. Most of the neighborhoods already have gateway features identifying community entrances; however, there is an

opportunity to develop additional sites along FM 2147 to ensure consistent appearance and quality along the road. Ensuring adequate maintenance is also an issue to keep these features attractive and inviting. If new facilities are developed that are not owned by a POA, this will become a City function, requiring appropriate funding and staffing to ensure adequate maintenance of these features.

In addition, it will be important to protect the appearance of at FM 2147 and Hwy 71 as new development occurs. Because this intersection is one of the primary entries to Horseshoe Bay, it will be vital to present the best face of the community. When expected development at this location begins, it will be vital for the City to work closely with the developer to ensure there are adequate setbacks as well as attractive landscaping and other features to create a unique and attractive visual environment for this site and discourage highway related development such as a convenience store and gas station.

Become a leader in efficient recycling and waste management services

Horseshoe Bay already provides a recycling collection center for citizens and visitors who choose to utilize this service. Solid waste services are provided by a private company through a contract with the City. To expand service to include curbside recycling would require an update to this contract and would result in increased fees for citizens.

This received quite a bit of attention and was a high priority from the public engagement process; however, this may change once the true cost is realized. The City should work with the solid waste provider to determine what the additional cost would be for service. It should also reach out to alternative providers to determine if there is a more cost effective service that would include curbside recycling. Once the costs are known, there can be an outreach and education process to determine the level of support for expanded service and if citizens are willing to pay for the expanded service. If support is there, it can be offered through the contract with the solid waste provider.

Community Services

As discussed, the character of Horseshoe Bay is changing somewhat, with 30 percent of citizens not being Resort members, increasing short term rentals, and a greater need to share information with citizens. These challenges will require the City to adapt to changing conditions and expectations and offer additional services and amenities that it has not had to in the past. The goals in this section address these challenges and offer a guide for ensuring Horseshoe Bay retains its high quality of life and remains a desired destination for futures citizens and visitors alike. Goals include:

- *Provide additional public recreational amenities*
- *Develop short term rental policy*
- *Expand community outreach and education*

Community Services Goals

Provide additional public recreational amenities



Horseshoe Bay currently has one small public park, located adjacent to City Hall. This park includes a plays cape and seating area. Citizens expressed a strong interest in having additional recreational amenities as part of the public engagement process. The City has an adopted Parks Master Plan that it developed in part to apply for a grant from

Texas Parks and Wildlife for a trail project. The grant was awarded and the trail is under development. This plan provides clear direction for expanding recreational amenities for the City, including trails and other facilities. The Parks Committee should be reinvigorated to take leadership in implementing this existing plan because it has already been completed and provides clear direction.

There is also an opportunity for a public park along FM 2147 between Highland Blvd. and the American Bank. There are two properties there with ponds, one is owned by the Property Owners' Association and the other by the Resort. This property would be an excellent location for a public because of its accessibility and visibility. The Parks Committee could initiate discussions with the POA and Resort about the possibility for acquisition of these properties. If they can be donated, these donations would count towards matching funds for any grants the City pursues to help develop the park. There are a variety of facilities that citizens have identified to be included in the park, it will be important to work with citizens to ensure amenities are built that serve their needs and desires at reasonable cost.

It will be important to develop a detailed funding plan that covers not just the park development, but also the on-going operations and maintenance expenses of a public park. Too often, cities find funding to build parks but do not think of long term costs and are soon left with deteriorating, underused facilities. It is vital that Horseshoe Bay budget for appropriate maintenance to support any added facilities.

There is an opportunity to develop a network of trails that connect Horseshoe Bay. The Parks Master Plan presents options for new trails, there can also be bicycle and walking lanes added to roads. This network can provide recreational opportunities for citizens and alternatives to driving for those who choose not to or are unable. The topography of Horseshoe Bay provides opportunities for trails to be built in areas unsuitable for other types of development and these can become part of the attraction for visitors as well as serving citizens.

Develop short term rental policy

As a resort destination, Horseshoe Bay has to deal with a large number of visitors. Many of these visitors stay at the Resort, but with the growth of services like AirBNB and others, there is growing use of short term rentals. This can be very beneficial for part-time citizens because they can generate



income from the property while not using it themselves, while there are also absentee property owners profiting from this.

As this trend continues, the potential for negative impacts becomes more of an issue. These challenges include noise complaints, parking, and crowding of facilities, along with others. It can become a quality of life issue as full-time citizens are impacted by visitors. A well-written policy can ensure property rights are protected while quality of life is preserved.

The first step, as with most, is to research best practices from other communities. This will provide insight into how other communities have addressed this issue as well as legal issues that need to be addressed. Once best practices are identified, staff can work with the City Attorney to develop a policy that is appropriate to Horseshoe Bay, reflecting local values and priorities. Once adopted, it will be incumbent to educate property owners to avoid any issues with enforcement going forward.

Expand community outreach and education

As people have become more connected through smart phones and social media, it has actually become harder to inform people about city activities and issues. It is very hard to communicate important information, leaving citizens to complain about not knowing what is happening, despite efforts made to inform them.

There is an established Communication Committee that can be tasked with this effort. This Committee should explore every avenue for communication and outreach including the City, POA's, the Resort, and other websites, social media, and other avenues.

This Committee also represents an opportunity for personal interaction, which can be vital. People respond to one on one communication, so having a network of individuals that can serve as ambassadors can be extremely beneficial. The Committee should begin to identify community leaders and others that can be recruited as ambassadors to help spread the word about community events and issues.

Conclusion

Horseshoe Bay is a unique destination that has a rich history and character developed over time. From its roots as a resort destination to its current identity as a retirement community and vacation hotspot, Horseshoe Bay has promoted a high quality of life for citizens and visitors alike. This plan identifies new challenges and opportunities facing Horseshoe Bay for the next five to ten years. The goals in this plan will position the City for continued growth and success through the protection and enhancement of the already high quality of life, diversifying the local economy, and protecting the environment that continues to be the key amenity.

This plan reflects the priorities of the citizens of Horseshoe Bay, the goals and objectives are based on extensive public engagement and outreach. It is important to recognize that adopting the plan is not the end of this process, instead it represents the beginning of the real work. Implementing the plan will take commitment from City Staff, City Council, Planning and Zoning Commission, POA's, the Resort, and citizens at large. It is vital that the plan become part of the day to day decision making process, guiding city leadership as they go through their budget process and allocate resources. The Plan should be reviewed semi-annually, especially during the budget process to ensure funding decisions are made in line with the Plan recommendations. In addition, a thorough review and revision process should be undertaken in five years. At this time, there will be new Census data that will provide more accurate population numbers, and enough time will have gone that there will likely be new issues and opportunities that should be addressed.

If the community embraces this plan, it will promote meaningful change in Horseshoe Bay and lead to a future that encompasses community goals and values. Current and future citizens and visitors will benefit from the actions taken today to implement the goals identified in this Comprehensive Plan Update.



City of Horseshoe Bay

**Long Range Plan Community Survey
Final Report**

June 2016

**Sue Breland, MSIS, CPM
Breland Facilitation**



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City of Horseshoe Bay

Long Range Plan Community Survey Result Report

June 2016

INTRODUCTION

The City of Horseshoe Bay appointed a Long Range Planning Committee (LRPC) to provide recommendations for a five to ten-year plan for this young city. In doing so, the LRPC incorporated several systems of research to access broad input from the citizenry to inform their recommendations which included: extensive briefings from city departments, the Resort, individual stakeholder interviews, an open community survey, and two town hall meetings. This report details the results of the community survey conducted during March and April 2016.

BACKGROUND

Important to this survey project, is an understanding of the history and evolution of the City of Horseshoe Bay (HSB). The community was founded in 1974 by the Hurd family along with a Property Owner's Association (POA) for the developed HSB residential subdivision in the 1970's. In 1996 the Jaffe family purchased the Hurd holdings and assumed management of the Resort and real estate. Since the beginning, additional subdivisions were developed and governed by individual POA and Home Owner Associations (HOA). In 2005, the citizens in this area voted to incorporate as a Class A City and a Home Rule Council-Manager Government was established. Since that time, the City has been challenged to develop its identity separate from the Horseshoe Bay Resort and POA/HOA organizations, while continuing to work in partnership with these important entities. Indeed, the resort and POA/HOA organizations were communication conduits for survey distribution. For these reasons, there are several questions within the survey that refer directly or indirectly to the HSB Resort and POAs.

Additionally, as an often referred to "resort/retirement community," there are citizens who reside here year-round as well as a significant number of residents who occupy homes in HSB only part-time (primarily through the autumn and spring months) or on a weekend or vacation basis. While 2015 information (ESRI Demographics) reports a population of 4471, the City reports a population calculation of 3,381 water meters multiplied by 1.99 residents per meter for a total population of 6,728. Based on survey demographic responses, that would equate to 4,389 full time and 2,521 part-time residents. These population characteristics presented challenges in both survey distribution, collection and return calculations.

The Long Range Planning Community Survey was an open survey, accessible through the City's website and promoted through City, HSB Resort, local POA's and the local newspaper. Paper surveys were also available at several public locations. A total of 1369 responses were collected, a very good response, and analyzed in this report. See the Methodology section for more detail on how the survey was designed, disseminated and collected.

RESPONDENT CHARACTERISTICS

Of the 14 questions in the survey, Questions #1 through #5, #7 and #13 were designed as population characteristic questions which were anticipated to be primarily used as filter (or cross tabulation) fields.

These characteristic filters included:

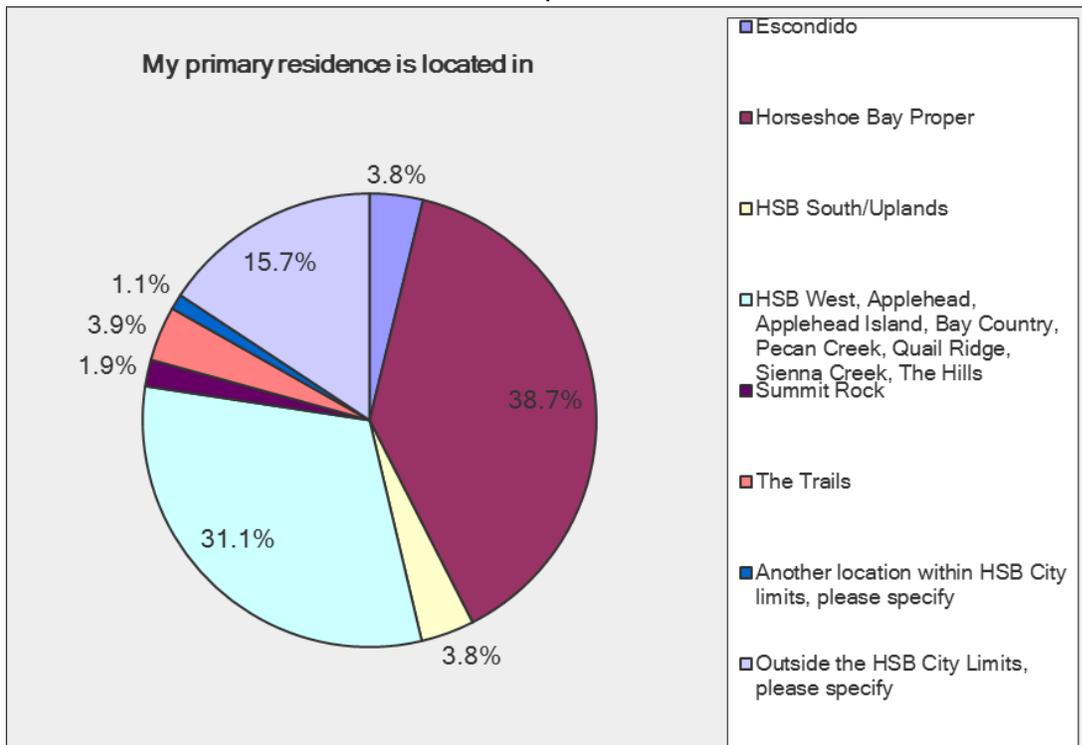
- Question 1 Location of primary residence
- Question 2 Length of time living in HSB primary residence
- Question 3 Full time or Part time residency
- Question 4 Type of domicile
- Question 5 Length of time any property has been owned
- Question 7 Age group
- Question 13 HSB Resort membership

Question 1

Most respondents make HSB proper their primary residence at 38.7% followed closely by the combined area that includes HSB West, Applehead, Applehead Island, Bay Country, Pecan Creek, Quail Ridge, Sienna Creek, and The Hills at 31.1%

Respondents from “Outside the HSB City Limits” were largely from the surrounding HSB area (20%), San Antonio area (19%), Dallas area (15.6%), Houston (12.7%) and Austin (12.3%) areas. Only 6% were from out of state.

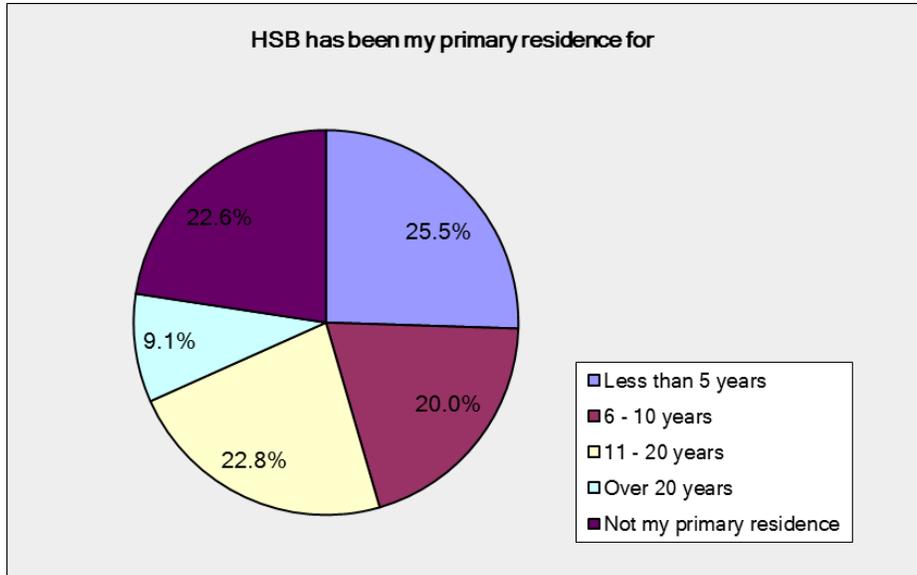
Graph 1



Question 2

In length of primary residency, other than the “over 20 years” group, all other respondent groups are very similar, ranging from 20% to 25.5%. The “over 20 years” group will be mentioned again in Question 5.

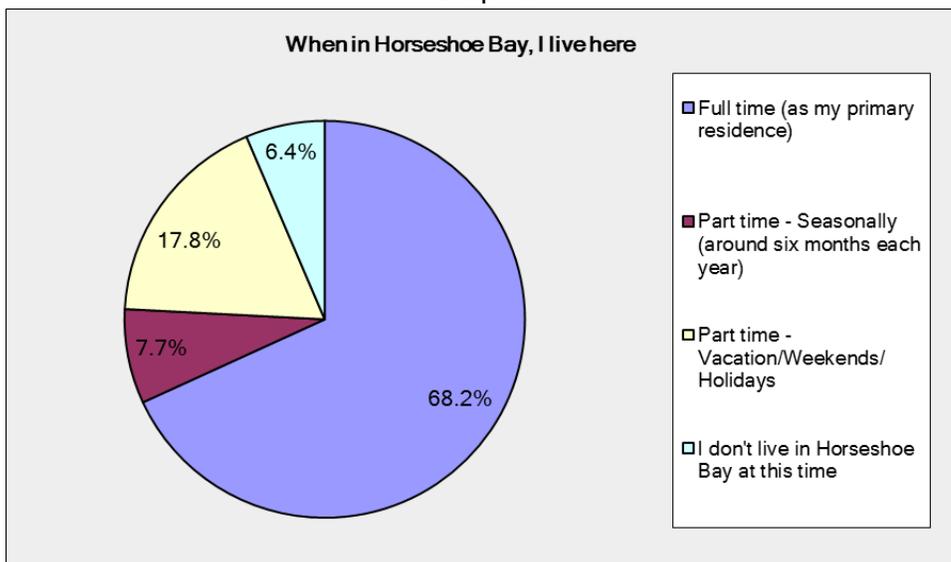
Graph 2



Question 3

Full time residents are the largest respondent group at 68.2%. They are the easiest group to reach with survey promotions and may be the most interested in the participating in City planning that will effect them on a daily basis. Interestingly, the next largest group of respondents, the part-time residents that live here on a short term basis (weekends and holidays), responded at more than twice the rate of the other part time residents who live in HSB on a seasonal basis.

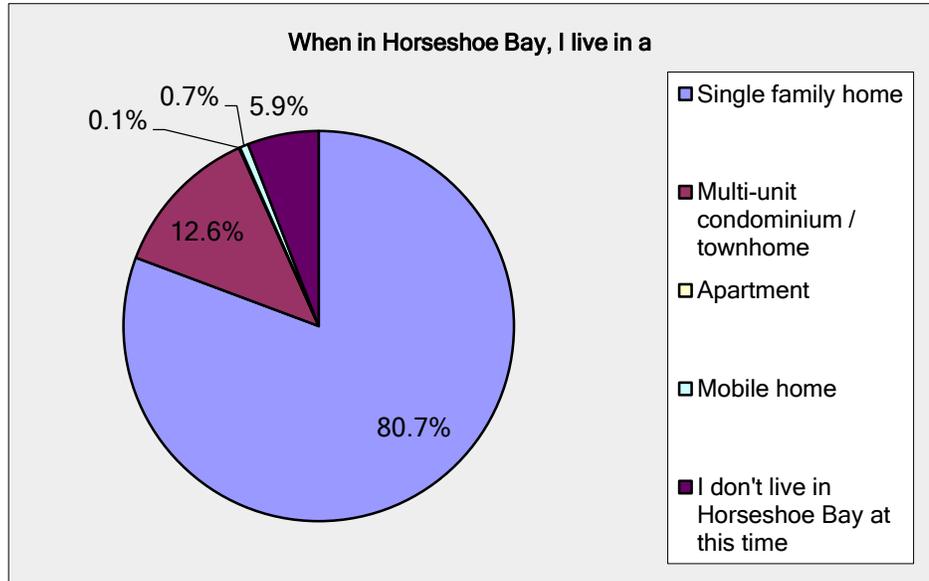
Graph 3



Question 4

80.7% respondents live in a single family homes and only 12.6% in multi-unit dwellings. This may indicate a more affluent responding population.

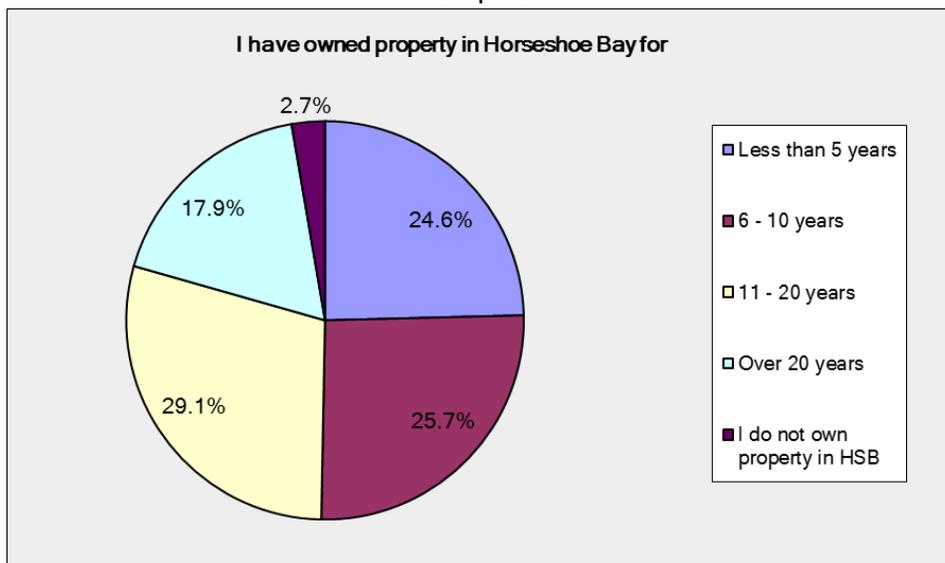
Graph 4



Question 5

Property ownership, not necessarily as a primary residence, but possibly as a second home or yet undeveloped land, is relatively equally spread including the "over 20 years" group of respondents. This could indicate respondents have a longer term relationship with HSB than Question 2 seems to show. It is very interesting that 47% of respondents owned property before the incorporation of the City and 50.3% since incorporation, almost evenly splitting perspectives of governance in HSB.

Graph 5



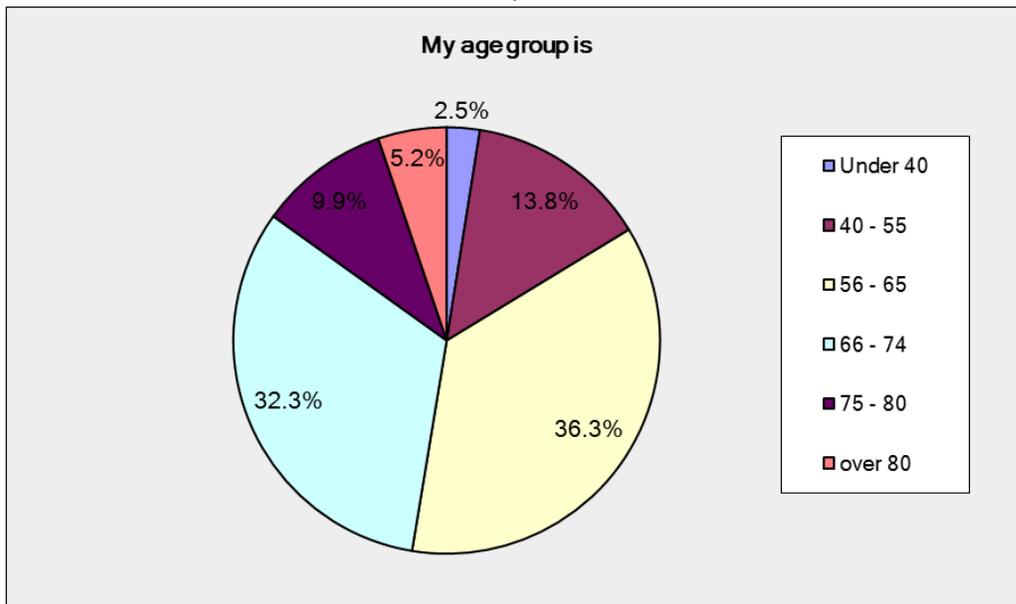
Question 7

From a community wide perspective, especially in long range planning, the age of respondents is particularly important, though not surprising. The majority of all respondents fall between the ages of 56 and 74, very much in support of HSB being a retirement community.

In nearly equal halves, 50% are between the ages of 40-65 and 47% over 66 (including a sizable group over 80); representing the earlier side or preparation for retirement and those who have settled into that lifestyle.

The 2.5% of respondents reporting to be under 40 years of age is an important consideration for a community, particularly if this is representative of the overall city. The needs and desires, as well as the benefits to a community of a younger population differ in many ways from a more mature population.

Graph 6

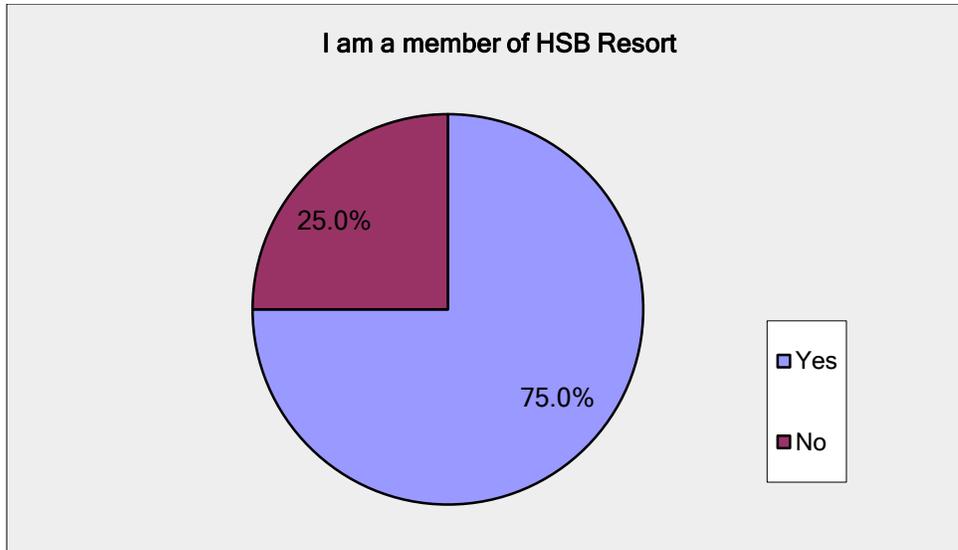


Question 13

The final demographic type question shows that one quarter of all respondents are not HSB Resort members at this time. There were a large number of comments regarding the HSB Resort in response to Question 14, both favorable and less so, but which show that membership does have an effect on other results in this report.

Citizens' relationship to the resort may be significant in terms of their satisfaction/discontent with the Resort management, how that spills over into their perspective of the City Government, and more importantly, confusion between these two entities and their roles in the community.

Graph 7



In final analysis, it was determined that the most important of these filtering fields would be “Full-time” residents, “Part-time” residents (all combined), “Primary residence less than 10 years,” “Primary residence more than 10 years,” “Age group 55 and under,” “Age group 56-74,” and “Age group 75 and over.” “Resort membership - Yes” and “Resort membership - No” filters were also frequently employed. The filtered information appears in the Data Tables section of this report.

PLANNING QUESTION RESULTS

Questions #6, and #8 through #12 were designed to solicit information directly related to planning.

These questions included:

Question 6 Reason for choosing HSB

Question 8 Level of need for high speed internet

Question 9 Level of support for pre-selected ideas for the future

Question 10 Level of support for HSB growth

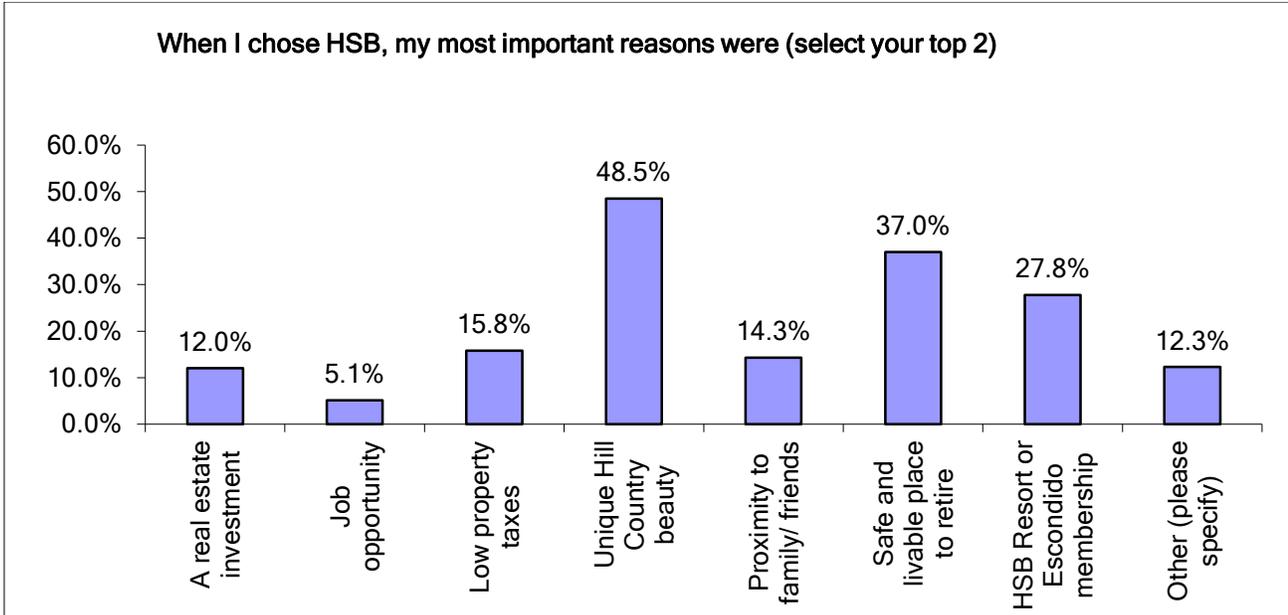
Question 11 Selection of bond pay-back method

Question 12 Level of improvement needed for specific spaces

Question 6

Overwhelmingly, respondents report choosing HSB because of the unique Hill County beauty, and this is true across all filter groups (see Table 6 for greater detail). Being a “Safe and livable place to retire” was ranked second, over all filter groups except the Part-Time respondents and the Under 55 set who ranked “HSB or Escondido membership” as their second highest ranking, which was third among most other filter groups. In the “Other” option, across all filter groups, “Lake” and “Golf” were top responses. These top rankings may be significant to planning efforts for the future and certainly are reflected in in other portions of the survey, including the open-ended comments submitted under Question 14.

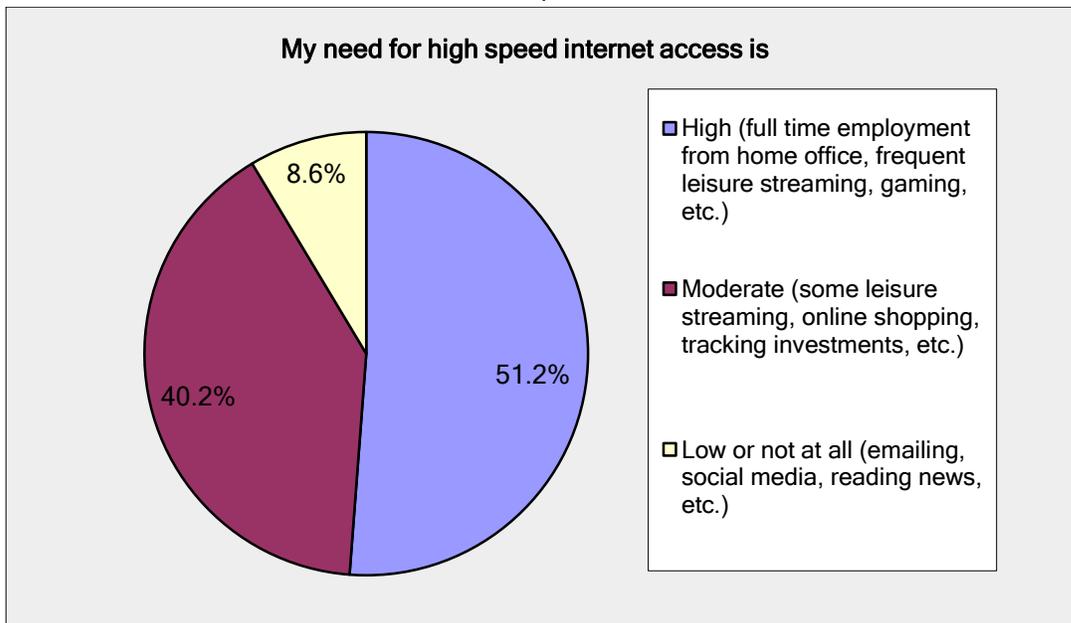
Graph 8



Question 8

Living, playing or working in the natural beauty of the Texas Hill Country does present challenges in remaining connected to the technology that is so a part of our world. With the prior belief that HSB was a retirement community, it was important for the LRPC to gain an understanding of the real need/desire for technology improvements. 91.4% of all respondents reported “High” or “Moderate” need for high speed internet access. Perhaps the most interesting result was that within the 75 and Older group, 52.9% reported a “Moderate” need and nearly 30% have a “High” need for this service. See Table 8 for greater detail.

Graph 9



Question 9

This was the most important question in the survey since it asked respondents to react to various future directions for the city on 19 different subjects. They were asked if their support was “Very Strong”, “Somewhat Strong”, “Not Very Strong” and “Not at all Strong”. It was a forced positive or negative rating with no mid-point (no “riding the fence” allowed). The Ideas/Options were created by the LRPC following initial stakeholder interviews as a way of putting structure around the many possibilities for future direction and to spur more conversation or creative alternatives which could be expressed in the open-ended question #14 or in later planned Town Hall meetings.

Graph 10 displays the results for all respondents. The “Total Positive” column is the simple addition of the “Very Strong” and “Somewhat Strong” responses while the “Total Negative” column is the addition of the “Not very Strong” and “Not at all Strong” responses even though “Not Very Strong” really isn’t a true negative. These responses were used to rank the 19 subjects. The relative differences in strength of conviction are obvious as “Total Positives” ranged from 83.99% to 30.17% between subjects and “Total Negative” from 16.01% to 69.84%.

The overall rankings did not vary my much across the filter groups (resident versus non-resident, age, etc.); at most, they were within 1-3 ranks within each option.

Clearly, the community’s concern for protecting the environment was evident – “*Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats*” was ranked #1 by All Respondents and no lower than 3rd across all filter groups. This is not an unusual outcome based on Question 6 results that show the community’s high appreciation of the *natural beauty* of HSB. See Table 9 for filter group details (There are several statistical ties which appear as duplicate rankings).

Ranked #2 by All Respondents, “*Continuing improvement of roads and adding a center turn lane on 2147*” ranked high across all filter groups except the Part-Time Residents (#6), perhaps because they don’t use the roads on a regular basis.

Ranked #3 by All Respondents, “*Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage*” and the same by most filter groups except the Over 75 group. Interestingly, however, is that while not #3, this group did rank technology enhancement as their #5, supporting the result in Question 8.

Of the next six ranked Idea/Options, all but one related to environmental issues or outdoor activities. Further supporting the depth of concern this community has for preserving or enhancing the natural surroundings of HSB. The Under 55 group was particularly more interested in “*Developing additional land for public parks, hiking trails and other outdoor recreational activities*” Idea/Option, likely due to being at a physically active life stage.

The Idea/Option within these six which did not relate to the environment specifically (although perhaps peripherally) is “*Encouraging retail/commercial development consistent with community and architectural standards.*” While in the top third of rankings by All Respondents, there was little

agreement across individual filter groups. For example, this ranked 5th among Part-Time Resident respondents, 7th among Full Time Resident respondents and 9th among the Over 75 age group of respondents. Comments provided in response to Question 14, which may apply to this level of variation, speak to differences in the perception of what “*retail/commercial development*” means and concerns over “architectural standards” in terms of governing and enforcing such standards. A good deal of the comments support (or strongly desire) more dining and boutique retail development and less of other types of commercial offerings. There are several comments indicating current systems which approve commercial development and reflect a lack of consensus around what architecture style or kind of business is acceptable for HSB. The growth of retail/commercial development bears much more research and discussion.

Other Ideas/Options that had general agreement in ranking, and interesting variation by filter group included:

- #10 “*Developing a plan for independent living, assisted living and nursing care facilities*” - Perhaps expected, with each older age group, the desirability of this option appeared 4-5 rankings higher, likely to allow them to remain in HSB throughout their lives as that decision draws more near (Under 55 group ranked #16, 55-74 group ranked #10 and Over 75 group ranked #6).
- #11 “*Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships*” - The younger and newer residents seem to desire more enhancements to infrastructure (Under 55 group ranked #9, Primary Residence Less than 10 Years group ranked #11).
- #16 “*Forming a historical society to preserve HSB history*” - Not surprisingly, the Over 75 group holds a higher regard for preserving history and honoring the past.
- #18 “*Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs*” – It is not unusual to find that the 75 and over group, likely who are driving less, would rate this option for mobility and independence higher than other groups (#15)
- #19 “*Seeking partnership with private school(s) to attract families with young children to HSB*” – Likewise, it is not unusual that the Under 55 group rated this option higher than any other group (#14).

It is also worth highlighting the results to Idea/Option #17 “*Devoting City resources to promoting HSB Resort amenities as a visitor destination.*” This Idea/Option was very controversial, ranking as high as 12th among Part Time Resident respondents and 13th by the Under 55 respondents, to as low as 19th (or dead last) among Full Time Resident respondents. The comments found in responses to Question 14 seem to reveal a current high level of discontent with the HSB Resort (ownership, management, maintenance, etc.). The Part Time respondents, 81% of which are Resort members and who reported a higher percentage choosing HSB because of the Resort (see Question 6 and

Table 9), may have a more positive view of the Resort and its relationship to the City since they are more removed from the day to day operations or issues of both.

More detailed analysis of the Full Time Resident respondents, and Part Time respondents by percentage agreement and disagreement can be found in Tables 9B and 9C in the Data Tables section of this report.

The data gathered from this question may be the most valuable information from the survey for the LRPC considerations and decision making in long range planning recommendations.

Graph 10
Question 9 Idea Support: All Respondents Ranking by Percentage

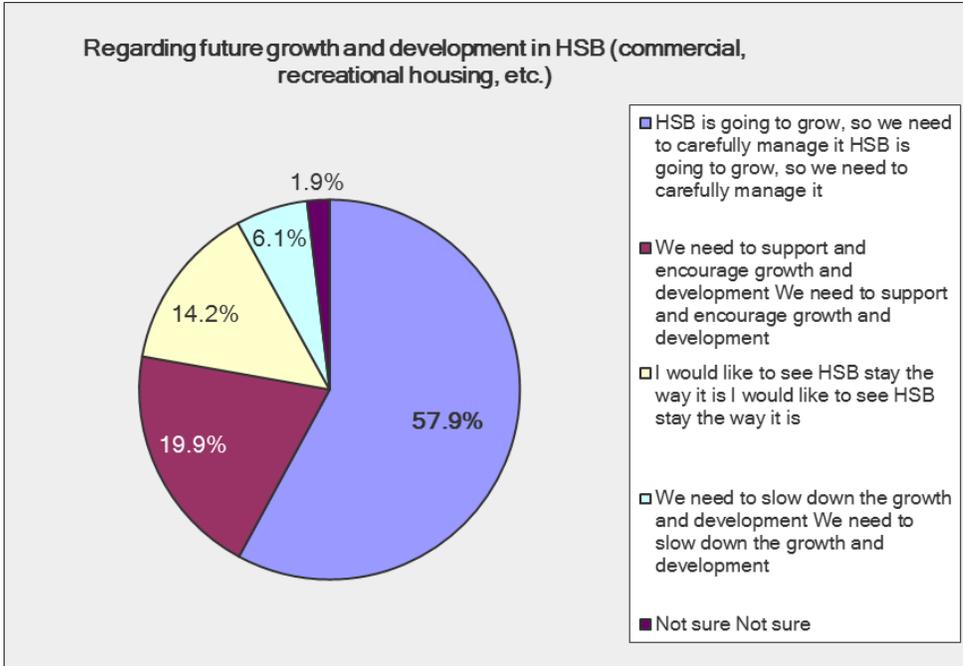
All Respondents	Total Positive	Very strongly	Somewhat strongly	RANK	Not very strongly	Not at all	Total Negative
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	83.99%	59.56%	24.43%	1	5.95%	10.07%	16.02%
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	81.27%	57.45%	23.82%	2	7.09%	11.63%	18.72%
Continuing improvement of roads and adding a center turn lane on 2147	79.92%	49.08%	30.84%	3	8.13%	11.95%	20.08%
Focusing on long term water availability strategies	79.84%	47.01%	32.83%	4	15.78%	4.38%	20.16%
Focusing on protecting and preserving the Live Oak tree population	73.62%	38.20%	35.42%	5	13.19%	13.19%	26.38%
Encouraging retail/commercial development consistent with community and architectural standards	68.21%	33.55%	34.66%	6	15.70%	16.10%	31.80%
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	67.83%	36.46%	31.37%	7	15.92%	16.24%	32.16%
Establishing standards and information sources for xeriscaping and other water conservation efforts	64.74%	26.91%	37.83%	8	20.80%	14.46%	35.26%
Developing additional land for public parks, hiking trails and other outdoor recreational activities	63.21%	28.81%	34.40%	9	20.11%	16.68%	36.79%

Developing a plan for independent living, assisted living and nursing care facilities.	55.79%	16.92%	38.87%	10	25.46%	18.75%	44.21%
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	52.24%	19.49%	32.75%	11	26.28%	21.49%	47.77%
Encouraging the formation of a HSB Chamber of Commerce to support local business development	48.52%	19.15%	29.37%	12	30.01%	21.47%	51.48%
Creating a public Information Center/ library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	45.36%	15.81%	29.55%	13	32.03%	22.60%	54.63%
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	40.83%	11.24%	29.59%	14	29.19%	29.98%	59.17%
Developing public lake access	35.88%	15.48%	20.40%	15	27.98%	36.13%	64.11%
Forming a historical society to preserve HSB history	33.68%	12.00%	21.68%	16	30.80%	35.52%	66.32%
Devoting City resources to promoting HSB Resort amenities as a visitor destination	32.67%	7.73%	24.94%	17	40.88%	26.45%	67.33%
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	31.31%	10.65%	20.66%	18	32.99%	35.71%	68.70%
Seeking partnership with private school(s) to attract families with young children to HSB	29.68%	8.56%	21.12%	19	38.40%	31.92%	70.32%

Question 10

Considering the high concern for maintaining the environmental health of HSB and its natural beauty, it may be a surprise that overwhelmingly, respondents agreed that “*HSB is going to grow, so we need to carefully manage it*” both among All Respondents (57.9%) and across all filter groups. Indeed, stopping or slowing growth was rated below the 2nd most popular response of “*We need to support and encourage growth and development*” by All Respondents. Only the Over 75 group and Primary Residents over 10 Years placed “*I'd like to see HSB stay the same*” above “*Support and encourage growth.*” See Table 13 for details. This seems to be a clear direction, but implementing a consensus of how to actually manage growth, may be a challenge.

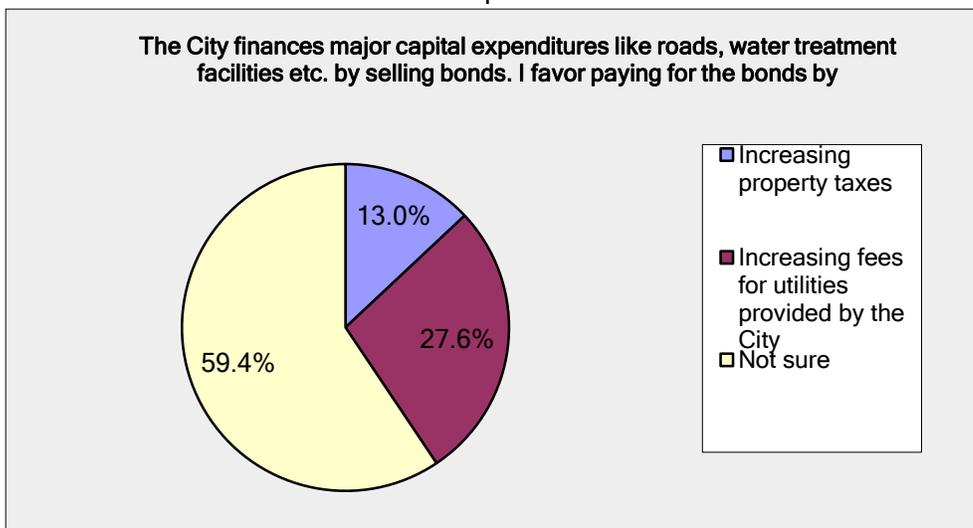
Graph 11



Question 11

The value of this question may lie in its ability to education survey participants on the issue of indebtedness and the difficult decisions that the City must make in this regard. The highly rated “Not sure” (59.4%) may indicate either that they don’t understand the issue, don’t know of other ways to pay back the bonds, or just don’t care for either of the listed choices. It is interesting, however, that 40.6% did choose to personally pay more in some way. The Part Time Resident respondents were much less interested in increasing property taxes as a way of paying for bonds (preferring utility fees, likely because they are not paying utilities year-round), whereas, the Full Time Resident respondents were more closely split between to two payback options (see Table 14 for more detail). Educating the HSB population on important issues that affect them is valuable take-away from this question.

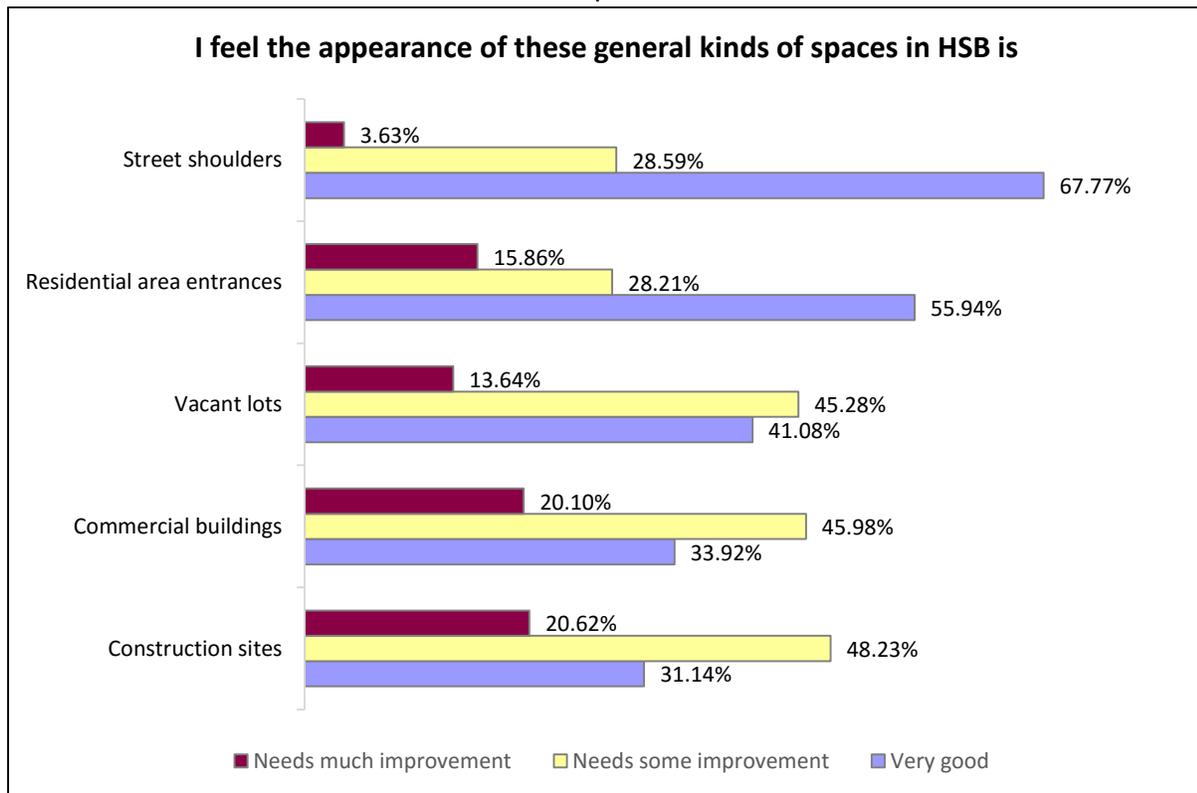
Graph 12



Question 12

In question 12, respondents were presented with types of spaces for which they could register their opinion of the general appearance of each on a scale of “Very Good” to “Needs Much Improvement.” While not all within the direct control of the City, there is influence that the City can use to make improvements. There was little variation between the weighted averages of any spaces (only .53 from highest to lowest average). Generally, “Street Shoulders” and “Residential area entrances” rated most favorably viewed and “Commercial buildings” and “Construction sites” designated as needing most improvement. Greater detail can be found in Tables 14 and 15 in the Data Tables section of this report.

Graph 13

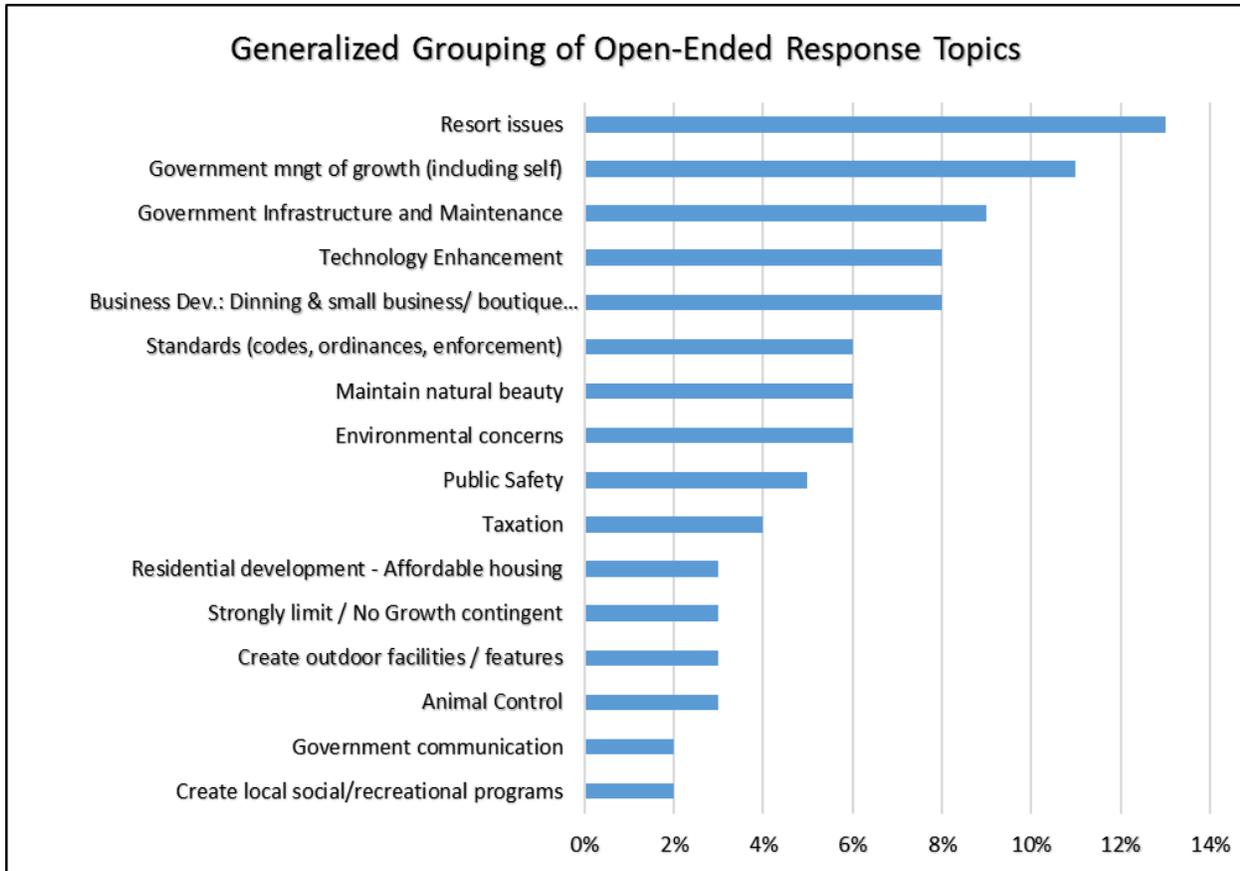


OPEN-ENDED QUESTION (Question 14) SUMMARY OF RESPONDENT COMMENTS

As an opportunity for respondents to include their own ideas in addition to the ratings and rankings they provided by other questions, Question 14 was designed as open-ended for a text response. 741 respondents took advantage of the opportunity to comment on “*The single most important thing City government could do to make HSB a better place to live or play over the next 5-10 years is...*” (not analyzed by filter group).

Many respondents provided multiple thoughts and most responses echoed choices registered in previous questions. Some themes emerged and appear in Graph 14. Few new ideas or options were presented, however, do provide some insight to the choices made in other areas of the survey. A few representative comments appear in each section of this analysis.

Graph 14



Beginning with the smaller areas of comment, creating local social/recreational programs separate from the Resort or as an option for non-resort members, was repeated theme.

“Many residents are dropping the Horseshoe Bay Resort due to occasional play and affordability. Can the city develop or work with HSB resort for a "residential" play fee...”

“Need more things to do here...42 dominos, bus trips to casinos, more social activities. Many new residents do not play golf, tennis.”

“More social things to do for people who live year round. We moved to Sun City because of a more active senior community.”

“We need to let others know this not just a resort destination but a full time community that enjoys many attributes, aside from the obvious ones.”

“We appreciate all the activities that are available and would benefit from a great online site or mobile app that listed as many of the activities as possible, not only the Resort activities, but events within the Highland Lakes area...”

Government communication was mentioned, both in regards to how the City provides information, as well as, is issue of listening to citizens and responding accordingly.

“Stay attentive to resident’s concerns or requests when they contact City Hall with any type of question! The manner in which their concerns or questions are answered is very important to HSB continued success in being a wonderful city in which to live.”

“Better communication to part time residents that own property as to construction, road work, etc.”

“Continue to strive for BETTER communication. What has happened in the last few months with new developments, proposed annexation has been very disappointing... Be honest and forthcoming and listen to the concerns of your citizens.”

“I am disappointed that the city staff and council have done such a poor job in truly communicating with the community and building consensus for new initiatives. “

The topic of animal control when voiced, was passionate. While mostly encompassing management of the deer population, the issue of feral cats was also included. With the high emphasis on maintaining the natural beauty of the HSB area as expressed in other questions, it is no surprise that this issue is controversial. While a larger contingent seemed to agree that particularly deer population control is important, the City’s current method of animal control is in question.

“Continue to manage the Animal control population even though all can't be satisfied.”

“Change the TTP process in dealing with the Animal control. It is in humane and quite disturbing to see the nets and possibly witness their terror. A sharp shooter or bow hunting would be a better alternative as well as sedating the does and sterilizing them. It is hard for me to be proud to live in a community where animals are treated with such cruelty. “

“The City should enforce the Animal control feeding ordinance.”

“Better control of Animal control and feral cat population.”

“Take better care of our wildlife, the Animal control were here before we got here and if you didn't like the Animal control why are you here?”

In addition to the creation of more social and recreational programs, mentioned before, specifically the creation of outdoor facilities or features was voiced. This supports the Question 9 Idea/Option *“Developing additional land for public parks, hiking trails and other outdoor recreational activities.”* These comments particularly suggested constructing facilities or purchasing equipment.

“Add exercise and stretching equipment along walking/running trail.”

“Definitely more hike & bike trails for increase in activities for elderly, parents and children or walking dog, a dog park perhaps or dog friendly park.”

"The city needs to have more access to the residents - not just the country club members. Such as - public access to lakes, parks, hiking trails, historical points, etc."

"Improve parks & trails, including mountain bike trails."

The "strongly limit or no growth contingent" was heard in the comments as in Question 10 responses regarding growth (*"I would like to see HSB stay the way it is"*).

"I don't want any commercial growth whatsoever, but I assume you will ignore the no-growth proponents. Given this likelihood, please confine ALL commercial development to the 2147 corridor where it is already concentrated. We don't need this ugliness and traffic scattered throughout HSB and we certainly DO NOT want to open the flood gate of allowing greedy developers to install convenience stores on Highway 71."

"Do not promote growth. Growth will bring traffic, condos, apartments and change what HSB is all about. The area growth around HSB has already doubled the traffic on 2147 since 2014. It will most likely double again by 2018, even if we adopt a no growth initiative. We need to cherish the lifestyle and safety we now enjoy. We need wise leaders, not greedy people."

"This is a resort town and we need to manage the growth to ensure that we don't get a lot of rental properties and attract unwanted people living here. I moved here due to the resort amenities and the quiet lifestyle. Would prefer that we not try to attract families with kids or residents who won't maintain their properties to our current standard. Nor do I think that we should be attempting to develop a lot of commerce/businesses in HSB but keep it as a resort town."

"HSB has been a successful community for over 50 years by focusing on the retiree and second home owner (which eventually lead to retirement homes)...please keep it that way...feel like city wants us to be a Lakeway type community...that is what we do not want... growth, both residential and commercial, needs to be carefully managed by city with citizens/residents input,...people who live here... not developers, not realtors, not resort, not any other party with \$\$ interest...please listen to the people who are here and chose to be here because of what it is...a quiet retirement / get away destination in the Texas hill country, that happens to have a resort...please keep it that way! Seen many developers/ opportunist come in, mess it up, then leave it for us to clean up...STOP"

"Please do not get all caught up in development. The area will probably grow, but the city needs to make sure that growth is not at the expense of the quiet, country atmosphere that has drawn people to the area."

An Idea/Option not asked in the survey, but which appeared in the comments were issues of affordable housing from differing perspectives.

*“Facilitate affordable housing for retirees by reducing / altering minimum housing sizes.”
(From a non-resident)*

“To plan for a more rounded populace to include and encourage affordable housing for those working in the service and hospitality industries so that we can attract longer term and higher quality workers.”

“Focus on keeping up the infrastructure, keeping property taxes low & not building apartments & high density housing. This usually indicates that the area is in economic slowdown & needs additional homes for the added income stream. High density housing usually creates more crime because many of these properties become rentals with tenants that do not value the home nor the area in which they live.

“Keep in mind that this is a retirement community and the property owners own housing in HSB because it is quiet, the natural beauty, low crime, the responsive police force, and the activities available for both seniors and younger extended family members who visit. We need to keep taxes low governmental over site at a minimum. We are not property owners that need schools! We do not need low income housing which will invite an increase in crime. Property owners are not there to subsidize the resort, or any private developers”

My fear over the next 5-10 years there will be no housing for the people who work here to live... This is a resort community and we need to keep an eye on affordable housing (doesn't have to be in Horseshoe Bay) But Fredericksburg and Marble Falls are running into this problem. (From a non-resident)

“Slow down development of multi-family housing.”

While taxation was mentioned peripherally in the survey (Questions 6 & 11), several comments were made regarding lowering taxes, using tax funds wisely or increasing business/sales taxes.

“Play fair with Business's that are trying to provide Business Development Services to our city by bringing in sales Tax and other revenue to keep Taxes Down, and Prices down, and to bring some fair competition to a city that is in great need of.”

“Manage growth and keep taxes low.”

“What we need to grow our tax base and keep the area thriving is young families who intend to be here for a long time...”

“lower property taxes to make it more affordable to retire at hsb.”

“City government should live within its financial means, focusing on requisite infrastructure and essential basic services, and not expect residents and/or taxpayers to pay for bloated bureaucracies and wasteful spending.”

“Considerer adding a hotel tax. The Resort visitors use our roads and infra-structure without helping pay for them. While the Resort makes a profit from the tourists, the City does not.”

Generally, the City’s public safety departments and programs are favorably viewed. This is additionally seen in responses to Question 6 regarding respondent’s choice to live in HSB because of it being a safe and livable place to retire. There is concern, however, regarding increase traffic and safety issues that arise with growth. There were several comments/compliments to City government and its employees.

“I would like to take a moment to praise the police force in Horseshoe Bay. The officers do a fabulous job of patrolling Lighthouse drive and are always so friendly and easily approachable. Your service is greatly appreciated! Thank you!”

“We love HSB and the City staff, police and fire as well as all the amenities supplied here in this great community. Keep up the great work as it is a beautiful and well managed community.”

“I would hope that the wonderful police, fire & EMS departments would continue their great service to our community in the years to come.”

“Continue to strongly support and enhance public safety capabilities, equipment needs, and provide appropriate incentive to recruit and retain high-quality staff.”

“My first thought is safety; we have exceptional officers and fireman, make sure they are compensated by pay and insurance.”

“Policing the area during the busy season I have noticed a large influx of undesirables over the summers that are fully aware of the luxury amenities we enjoy. It won't be long before we start to worry about security and responsible ownership. The police are more important than we really care to admit. Support them.”

“The personnel in all our various departments are most pleasant and do a super job... police, fire and water...all do a great job.”

“I want to thank the City for keeping control of our speeders on 2147. The Police Department does a great job on monitoring this.”

“Continue to keep us safe with our wonderful Police Dept. and Fire Dept.”

“I do believe the vehicle traffic, crime and drug use will increase as the population grows in the area, even if they are seasonal visitors. I hope that there will be continued police patrols and that this will increase, and not decrease due to future improvements in the HSB area.”

The next three themes, each representing approximately 6% of the responses to Question 14, seem to be interrelated but with an emphasis worth delineating: Environmental concerns, Maintain

natural beauty and Standards (codes, ordinances, enforcement). Certainly, from the broad support for the environment and natural surroundings found throughout this survey, this area would generate a number of comments.

Environmental concerns included specific programs of protection and waste management that the City can (or does) directly engage such as recycling, invasive vegetation, and water conservation.

"Please start Recycling!!! At least Paper, Cardboard, Plastic & Al. Please start picking up beer cans, bottles & paper along the roadsides!"

"Maintain great services INCLUDING RECYCLING pickup. It is disgraceful the city does not provide this service. No light pollution but a 60s view toward recycling... IT WILL PAY FOR ITSELF with a little creative thinking and using available grant funds."

"Take a leadership role in the MILFOIL situation which currently is left up to individual homeowners and affects all water-related sporting/boating activities and commensurate expenses rating to this unattended responsibility!!!"

"1. Strive to encourage natural xeriscaping and minimalist landscaping on lots in order to conserve water. 2. Work with residents to store rainwater for use on landscapes."

Maintaining the natural beauty of an area is a much more difficult issue to define in terms of what the City can do to satisfy this desire while managing growth.

"Maintain the quiet, peaceful living environment while promoting economic development and convenient Business Development and service business."

"Please do not over commercialize the area, that's a big part of the beauty of it!"

"The area will probably grow, but the city needs to make sure that growth is not at the expense of the quiet, country atmosphere that has drawn people to the area."

The issue of architectural standards, development ordinances and enforcement, may have the greatest impact on the desire for keeping a natural feel to the area, but comments indicate there are also many challenges.

"Not everything has to be strictly regulated, controlled, and made to look picture perfect..."

"Manage the growth and maintain the architectural and enforcement standards"

"Insure that residential growth and expansion is keeping with the standards that current HSB residences and property owners currently expect. Want to make sure that we keep the exclusive "feel" of all parts of HSB."

“Need rules that are real and livable that encourage home improvement. Parking is very difficult and discourages visitors. I would love to see the city maintain the areas that made HSB special to start with.”

“Change architectural and ordinance restrictions, provide free workshops and expertise and possible subsidization to encourage private residence owners to invest in hidden, low profile water catchment devices and solar energy devices that could supplement public utility usage. More importantly such devices would be available in the event of a catastrophic emergency that knocks out public utility services. Such ordinance changes could also be a boost for real estate sales.”

Where business development garnered specific input, the direction was clear: restaurants and fine dining establishments. Other desired businesses included boutique shopping options and business service firms. From the large response in Question 8 on increasing high speed internet likely for home offices and remote work, firms that cater to small and independent business people may be indicated. Managing inevitable growth and development was the most popular choice of respondents in Question 10, and the number of comments around this issue support that outcome.

“We need more family friendly restaurants...”

“Need a couple more bars, restaurants, and those type places in walking distance.”

“Facilitate the development of a well-planned complex of small shops and services in HSB to provide more options for visitors to do as well as provide more home-town shopping options. This will increase the number of visitors and tourists coming through to eat which will allow more new restaurants to come in and survive. The additional sales tax and property taxes will help keep our property tax low.”

“Encourage restaurants, shops/boutiques and art galleries. This will bring people to HSB and the resort which will result in excellent lifestyle for residents and bring in tax revenue for the city.”

“Foster growth of business that would provide nicer shopping opportunities for travelers & residents of the HSB lifestyle. Marble Falls shopping with the exception of a few stores, is marginal and suited for lower middle and low income families. I'd like to see more unique, boutiques, swimwear, clothing, golfing that would be fun for residents and travelers to the resort.”

“Also, would love to see growth opportunities for restaurants in the area, very little out here and it's frustrating to have to go all the way in to Marble Falls for dinner.”

“Encourage development of resources that will improve the way we live and play, and that decrease our reliance on neighboring communities.”

“Encourage additional Business Development so folks keep their money in HSB and reduce driving distance for residence.”

Technology enhancement, as overwhelmingly desired in responses to Question 8, was supported by many comments in Question 14.

"Encourage Technology businesses to increase capital investment and offer more citizens more high speed Technology choices."

"Invest in technology infrastructure and availability."

"Develop plans to bring high speed Technology service to the area. If the service stays as bad as it is, it will deter younger people from moving here and keep others who need to work from home from doing so. This is the most inconvenient thing about living in HSB!"

Supporting the #2 Idea/Option in Question 9, comments indicate respondents care about the roads, infrastructure and maintenance of public area in HSB. With approximately 9% of the responses in Question 14, citizens want the City to keep this a priority.

"Make sure that the infrastructure of roads, sewers, etc. are kept maintained..."

"Sidewalks"

"Maintain infrastructures (roads, underground electric distribution, Technology). Work with LCRA to put 138 kv transmission underground or in gas insulated bus."

"Maintain roads and utility infrastructure."

"Continue the street paving."

"Continue road development for lesser house density areas that are primary arterial roadways and connectors, for example, High Mesa from Western Bit to Airport."

"Keep empty lots cleared and well-groomed so overall appearance of our community is attractive."

"Please repair or remove cedar fences..."

Like in Question 10, respondents desire the managed growth of HSB. The comments here indicate a desire for "slow," "conservative," and "careful" development, but additionally, a concern for City government to manage its own growth in size and bureaucracy.

"Maintain what we've got and control reasonable growth. Be very, very cautious of making zoning changes."

"Encourage reasonable growth without hindrances. Keep government small."

"Keep government small and efficient. Be conservative keep operating expenses and benefits low."

"Government needs to do LESS not more."

“Continue the efficient supply of City services (Police, Fire, Water, Waste Water treatment, Animal control) while supporting growth without financial support to developers and builders.

“Careful financial planning and management to avoid debt.”

“City government needs to stop trying to do so much. Tell people NO sometimes.”

Finally, although the open ended question stated “The single most important thing City government could do to make HSB a better place to live or play over the next 5-10 years is” many respondents choose to make a variety of comments about the Resort. Although the Resort is the single most important economic and social entity in the City, this was not a part of the committees’ solicited research, so these comments are not included in this report. Should interested parties wish to see these comments, they are available on request at City Hall.

METHODOLOGY

The methodology for this survey puts the design, dissemination and collection in context and provides a framework for understanding results.

The LRPC incorporated several systems of research to access broad input from the citizenry to inform their recommendations which included: individual stakeholder interviews, an open community survey, and two town hall meetings. The Community Survey served as the bridge between the other two systems. With the stakeholder interview results as a base of information and in partnership with Breland Facilitation, the LRPC designed the survey instrument. It was determined that an electronic survey would be the appropriate vehicle as the HSB community has a very high percentage of profession/retired professional population that could be best reached by email. To ensure the broadest accessibility possible, however, an identical paper survey was also created for those who may not be connected or comfortable with technology.

The electronic survey link to SurveyMonkey.com, was embedded on the City’s website, prominently on the homepage and opened February 28, 2016. An e-blast to the City’s list of citizen email addresses was sent. Additionally, local POA’s and the HSB Resort sent the link to all of their members with email addresses. A story was produced in the HSB Beacon, directing citizens to the City’s website survey link and provided the locations where paper surveys could be picked up and deposited when complete.

The survey remained open through April 18. A total of 1369 responses were collected by the close date (1,312 via electronic instrument, 57 via paper version). The data from the paper surveys were manually entered into the electronic tool so that those results were seamlessly included in analysis.

A preliminary analysis was provided April 11th to allow the LRPC with information needed to develop questions and talking points for their upcoming Town Hall Meetings. Once closed, the final analysis report was created.

DATA TABLES WITH FILTERS

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Table 2 Question 2 Years HSB Primary Residence

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Table 11 Question 9:C Idea Support: Full Time Respondents Ranking by Percentage

Table 12 Question 9:D Idea Support: All Part Time Respondents Ranking by Percentage

Table 13 Question 10 Desire for Future Growth

Table 14 Question 11 Bond Pay Back

Table 15 Question 12:A Appearance of Public Spaces by Weighted Average

Table 16 Question 12:B Appearance of Public Spaces by Percentage

Table 17 Question 13 Resort Membership

Table 2 Question 2 Years HSB Primary Residence

Question 2 Respondent length of time in HSB primary residency										
Number of Respondents per category	1369	934	348	221	930	205	623	437	959	320
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10	Resort Yes	Resort No
Less than 5 years	25.5%	30.7%	17.2%	36.7%	26.8%	8.3%	56.0%	0.0%	23.8%	33.1%
6 - 10 years	20.0%	26.3%	7.8%	15.4%	22.8%	13.7%	44.0%	0.0%	20.2%	19.4%
11 - 20 years	22.8%	29.9%	8.6%	8.6%	22.9%	37.1%	0.0%	71.4%	24.8%	16.6%
Over 20 years	9.1%	13.0%	0.9%	0.5%	6.2%	32.2%	0.0%	28.6%	9.2%	8.8%
Not my primary residence	22.6%	0.1%	65.5%	38.9%	21.3%	8.8%	0.0%	0.0%	22.0%	22.2%
	100.0%	100.0%	100.0%	100.1%	100.0%	100.1%	100.0%	100.0%	100.0%	100.1%

Table 3 Question 3 Full time / Part Time Residency

Question 3 Respondent type of residency (full time / part time)								
Number of Respondents per category	1369	221	930	205	623	437	959	320
	All	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10	Resort Yes	Resort No
Full time	68.2%	49.3%	68.9%	86.8%	85.6%	91.5%	69.1%	67.8%
Part Time Seasonally	7.7%	5.9%	8.7%	4.4%	7.7%	4.3%	7.9%	6.9%
Part Time Vacations	17.8%	35.3%	16.3%	4.9%	6.3%	3.2%	19.5%	12.2%
Do not live in HSB	6.4%	9.5%	6.0%	3.9%	0.5%	0.9%	3.4%	13.1%
	100.1%	100.0%	99.9%	100.0%	100.1%	99.9%	99.9%	100.0%

Table 4 Question 4 Type of Domicile

Question 4 Respondent type of domicile								
Number of Respondents per category	1363	931	345	220	928	203	620	436
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Single family home	80.7%	91.7%	69.3%	65.9%	82.7%	88.7%	88.1%	92.9%
Multi-unit condominium / townhome	12.6%	7.2%	29.9%	23.2%	11.0%	8.4%	10.5%	6.2%
Apartment	0.1%	0.0%	0.3%	0.0%	0.1%	0.0%	0.2%	0.0%
Mobile home	0.7%	1.1%	0.0%	2.3%	0.5%	0.0%	1.1%	0.7%
I don't live in Horseshoe Bay at this time	5.9%	0.0%	0.6%	8.6%	5.7%	3.0%	0.2%	0.2%
	100.0%	100.0%	100.1%	100.0%	100.0%	100.1%	100.1%	100.0%

Table 5 Question 5 Years Property Ownership

Question 5 Respondent time of property ownership								
Number of Respondents per category	1350	925	341	221	925	204	617	433
	All	Full Time	All Part Time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Less than 5 years	24.6%	22.4%	33.4%	44.8%	23.7%	6.9%	40.5%	0.5%
6 - 10 years	25.7%	24.5%	29.6%	27.1%	28.1%	13.2%	40.0%	2.8%
11 - 20 years	29.1%	31.7%	24.0%	18.1%	31.8%	28.9%	12.3%	58.0%
Over 20 years	17.9%	20.2%	12.0%	4.1%	14.1%	50.5%	5.5%	38.1%
I do not own property in HSB	2.7%	1.2%	0.9%	5.9%	2.4%	0.5%	1.6%	0.7%
	100.0%	100.0%	99.9%	100.0%	100.1%	100.0%	99.9%	100.1%

Table 7 Question 7 Age Group

Question 7 Respondent Age Group							
Number of Respondents per category	1356	928	343	621	433	959	320
	All Avg	Full time	All Part-time	Primary Res <10	Primary Res >10	Resort Yes	Resort No
Under 40	2.5%	2.5%	2.9%	3.5%	0.7%	2.7%	2.2%
41-55	13.8%	9.3%	23.6%	15.0%	3.9%	14.5%	12.5%
56-65	36.3%	32.3%	46.6%	44.6%	18.7%	35.8%	35.9%
66-74	32.3%	36.7%	21.3%	29.6%	43.9%	31.6%	34.4%
75-80	9.9%	12.5%	3.5%	4.8%	21.0%	10.5%	8.4%
Over 80	5.2%	6.7%	2.0%	2.4%	11.8%	4.9%	6.6%
	100.0%	100.0%	99.9%	99.9%	100.0%	100.0%	100.0%
Median age group	56-65	66-74	56-65	56-65	66-74	56-65	56-65
Estimated median age	64	66	60				

Table 8 Question 8 Need for High Speed Internet

Question 8 Need for high speed internet access								
Number of Respondents per category	1347	922	341	218	925	204	617	430
	All	Full Time	All Part Time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
High (full time employment from home office, frequent leisure streaming, gaming, etc.)	51.2%	47.2%	58.1%	59.2%	54.2%	28.9%	54.6%	40.9%
Moderate (some leisure streaming, online shopping, tracking investments, etc.)	40.2%	42.3%	37.8%	39.9%	37.5%	52.9%	38.2%	45.8%
Low or not at all (emailing, social media, reading news, etc.)	8.6%	10.5%	4.1%	0.9%	8.3%	18.1%	7.1%	13.3%
	100.0%	100.0%	100.0%	100.0%	100.0%	99.9%	99.9%	100.0%

Table 9 Question 9:A Idea Support Over-all Ranking by Weighted Average

Question 9 Ideas / Options Presented (Higher weighted average / lowest rank # most desired)	1327 All	R A N K	910 Full Time	R A N K	339 All Part Time	R A N K	219 Age <55	R A N K	908 Age 56-74	R A N K	200 Age >75	R A N K	614 Primary Res <10	R A N K	422 Primary Res >10	R A N K
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	3.33	1	3.18	2	3.69	1	3.19	3	3.35	1	3.40	1	3.32	2	3.11	2
Continuing improvement of roads and adding a center turn lane on 2147	3.24	2	3.30	1	3.07	6	3.32	1	3.25	3	3.11	3	3.33	1	3.21	1
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	3.22	3	3.08	3	3.59	2	3.24	2	3.27	2	3.03	5	3.24	3	3.00	3
Focusing on long term water availability strategies	3.13	4	3.03	4	3.36	3	2.98	5	3.15	4	3.23	2	3.13	4	2.98	4
Focusing on protecting and preserving the Live Oak tree population	2.95	5	2.82	5	3.24	4	2.81	7	2.96	5	3.08	4	2.90	5	2.82	5
Encouraging retail/commercial development consistent with community and architectural standards	2.84	6	2.70	7	3.14	5	2.98	5	2.86	6	2.60	9	2.89	6	2.54	9
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	2.82	7	2.73	6	3.02	7	2.76	8	2.84	7	2.80	8	2.86	7	2.59	7
Establishing standards and information sources for xeriscaping and other water conservation efforts	2.74	8	2.67	8	2.88	9	2.65	10	2.75	9	2.81	7	2.78	9	2.57	8
Developing additional land for public parks, hiking trails and other outdoor recreational activities	2.73	9	2.62	9	2.99	8	2.95	6	2.75	9	2.43	10	2.79	8	2.44	10
Developing a plan for independent living, assisted living and nursing care facilities.	2.51	10	2.53	10	2.44	13	2.16	16	2.53	10	2.82	6	2.49	12	2.61	6
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	2.48	11	2.37	12	2.68	11	2.67	9	2.49	11	2.22	13	2.53	10	2.21	12
Encouraging the formation of a HSB Chamber of Commerce to support local business development	2.43	12	2.30	13	2.70	10	2.58	11	2.45	12	2.18	14	2.51	11	2.10	13
Creating a public Information Center/library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	2.38	13	2.41	11	2.25	15	2.33	12	2.38	13	2.41	11	2.48	13	2.25	11
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	2.19	14	2.14	14	2.27	14	2.16	16	2.22	14	2.11	16	2.30	14	1.97	16
Developing public lake access	2.14	15	2.10	15	2.08	19	2.14	17	2.18	15	1.92	17	2.22	15	1.92	17
Forming a historical society to preserve HSB history	2.12	16	2.07	16	2.21	16	2.05	18	2.11	16	2.26	12	2.12	16	2.03	14
Devoting City resources to promoting HSB Resort amenities as a visitor destination	2.08	17	1.87	19	2.47	12	2.31	13	2.09	17	1.77	19	2.08	18	1.71	19
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	2.04	18	2.02	17	2.08	19	2.01	19	2.04	18	2.12	15	2.07	19	1.99	15
Seeking partnership with private school(s) to attract families with young children to HSB	2.03	19	1.94	18	2.20	17	2.25	14	2.01	19	1.90	18	2.10	17	1.79	18

Table 10 Question 9:B Idea Support: Full Time Respondents Ranking by Percentage

Full Time Respondents	Total Positive	Very strongly	Somewhat strongly	RANK*	Not very strongly	Not at all	Total Negative
Continuing improvement of roads and adding a center turn lane on 2147	82.43%	52.06%	30.37%	1	13.57%	4.00%	17.57%
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	79.51%	52.93%	26.58%	2	6.20%	14.29%	20.49%
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	74.00%	52.44%	21.56%	3	7.44%	18.56%	26.00%
Focusing on long term water availability strategies	74.67%	47.11%	27.56%	4	6.33%	19.00%	25.33%
Focusing on protecting and preserving the Live Oak tree population	67.07%	34.81%	32.26%	5	12.97%	19.96%	32.93%
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	63.84%	31.92%	31.92%	6	13.46%	22.69%	36.15%
Encouraging retail/commercial development consistent with community and architectural standards	60.62%	32.48%	28.14%	7	15.80%	23.58%	39.38%
Establishing standards and information sources for xeriscaping and other water conservation efforts	61.06%	26.94%	34.12%	8	17.96%	20.99%	38.95%
Developing additional land for public parks, hiking trails and other outdoor recreational activities	58.03%	25.78%	32.25%	9	19.98%	21.99%	41.97%
Developing a plan for independent living, assisted living and nursing care facilities.	57.70%	18.53%	39.17%	10	18.97%	23.33%	42.30%
Creating a public Information Center/ library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	47.27%	18.02%	29.25%	11	28.48%	24.25%	52.73%
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	46.87%	17.52%	29.35%	12	25.45%	27.68%	53.13%
Encouraging the formation of a HSB Chamber of Commerce to support local business development	42.37%	17.06%	25.31%	13	28.32%	29.32%	57.64%
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	38.35%	11.37%	26.98%	14	25.98%	35.67%	61.65%
Developing public lake access	34.87%	14.22%	20.65%	15	25.73%	39.39%	65.12%
Forming a historical society to preserve HSB history	31.36%	7.56%	23.80%	16	37.04%	31.59%	68.63%
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	29.47%	8.26%	21.21%	17	34.49%	36.05%	70.54%
Seeking partnership with private school(s) to attract families with young children to HSB	26.63%	10.00%	16.63%	18	30.34%	43.03%	73.37%
Devoting City resources to promoting HSB Resort amenities as a visitor destination	25.23%	7.85%	17.38%	19	28.59%	46.19%	74.78%

Table 11 Question 9:C Idea Support: All Part Time Respondents Ranking by Percentage

All Part Time Respondents	Total Positive	Very strongly	Somewhat strongly	RANK*	Not very strongly	Not at all	Total Negative
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	94.36%	74.78%	19.58%	1	5.04%	0.59%	5.63%
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	93.14%	66.87%	26.27%	2	5.97%	0.90%	6.87%
Focusing on long term water availability strategies	87.17%	50.45%	36.72%	3	11.64%	1.19%	12.83%
Focusing on protecting and preserving the Live Oak tree population	83.08%	44.21%	38.87%	4	13.65%	3.26%	16.91%
Encouraging retail/commercial development consistent with community and architectural standards	77.68%	41.37%	36.31%	5	16.37%	5.65%	22.02%
Continuing improvement of roads and adding a center turn lane on 2147	73.52%	38.10%	35.42%	6	21.43%	5.06%	26.49%
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	74.03%	34.33%	39.70%	7	20.00%	5.97%	25.97%
Developing additional land for public parks, hiking trails and other outdoor recreational activities	72.49%	34.32%	38.17%	8	19.23%	8.28%	27.51%
Establishing standards and information sources for xeriscaping and other water conservation efforts	68.16%	24.92%	43.24%	9	26.73%	5.11%	31.84%
Encouraging the formation of a HSB Chamber of Commerce to support local business development	58.21%	22.09%	36.12%	10	31.94%	9.85%	41.79%
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	59.70%	20.60%	39.10%	11	28.06%	12.24%	40.30%
Devoting City resources to promoting HSB Resort amenities as a visitor destination	46.59%	18.99%	27.60%	12	34.72%	18.69%	53.41%
Developing a plan for independent living, assisted living and nursing care facilities.	46.43%	11.61%	34.82%	13	39.88%	13.69%	53.57%
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	40.30%	8.66%	31.64%	14	37.61%	22.09%	59.70%
Creating a public Information Center/ library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	37.80%	10.12%	27.68%	15	39.58%	22.62%	62.20%
Forming a historical society to preserve HSB history	32.83%	7.46%	25.37%	16	48.06%	19.10%	67.16%
Seeking partnership with private school(s) to attract families with young children to HSB	35.21%	10.36%	24.85%	17	39.35%	25.44%	64.79%
Developing public lake access	27.46%	7.46%	20.00%	19	45.67%	26.84%	72.51%
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	30.12%	12.95%	17.17%	19	34.94%	34.94%	69.88%

Table 12 Question 10 Desire for Future Growth

Question 10 Desire of future growth and development (commercial, recreational housing, etc.)								
Number of Respondents per category	1269	873	323	212	865	192	585	403
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
HSB is going to grow, so we need to carefully manage it	57.9%	57.8%	60.7%	57.1%	56.5%	65.1%	57.4%	59.1%
We need to support and encourage growth and development	19.9%	17.3%	22.6%	27.4%	20.8%	7.8%	22.1%	11.7%
I would like to see HSB stay the way it is	14.2%	17.0%	9.3%	9.4%	14.5%	18.2%	12.6%	20.6%
We need to slow down the growth and development	6.1%	6.8%	4.0%	4.7%	6.5%	5.7%	7.2%	6.2%
Not sure	1.9%	1.1%	3.4%	1.4%	1.7%	3.1%	0.7%	2.5%
	100.0%	100.0%	100.0%	100.0%	100.0%	99.9%	100.0%	100.1%
Only the Over 75 and Primary Residents > 10 groups placed "I'd like to see HSB stay the same" above "Support and encourage growth"								

Table 13 Question 11 Bond Pay Back

Question 11 Desired Bond pay back method								
Number of Respondents per category	1255	860	320	207	858	190	582	393
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Increasing property taxes	13.0%	15.2%	6.9%	8.7%	13.1%	17.4%	12.5%	17.0%
Increasing fees for utilities provided by	27.6%	21.0%	41.3%	28.5%	27.5%	26.8%	25.9%	20.6%
Not sure	59.4%	63.7%	51.9%	62.8%	59.4%	55.8%	61.5%	62.3%
	100.0%	99.9%	100.1%	100.0%	100.0%	100.0%	99.9%	99.9%
<p>The Part Time Resident respondents were much less interested in increasing property taxes as a way of paying for bonds, whereas, the Full Time Resident respondents were more closely split between to two payback options.</p> <p>The largest response was "Not sure" across all response groups. Since surveys are an opportunity to educate, this can open a conversation on the bond expense issue. However, it is interesting that 40.6% did choose to personally pay more in some way.</p>								

Table 14 Question 12:A Appearance of Public Spaces by Weighted Average

Question 12 Appearance of public spaces (weighted averages)									
Ranked from Very Good (higher score/low rank#) to Needs Much Improvement (lower score/high rank#)									
Number of Respondents per category	1264		871	322	210	861	193	585	402
	All	RANK	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Street shoulders	2.64	1	2.66	2.62	2.64	2.67	2.52	2.67	2.65
Residential area entrances	2.40	2	2.29	2.64	2.29	2.41	2.50	2.34	2.34
Vacant lots	2.27	3	2.28	2.22	2.41	2.31	1.97	2.32	2.21
Commercial buildings	2.14	4	2.05	2.34	2.05	2.13	2.27	2.07	2.12
Construction sites	2.11	5	2.03	2.28	2.19	2.10	2.04	2.11	1.98

Table 15 Question 12:B Appearance of Public Spaces by Percentage

All Respondents	Very good	Needs some improvement	Needs much improvement
Street shoulders	67.77%	28.59%	3.63%
Residential area entrances	55.94%	28.21%	15.86%
Vacant lots	41.08%	45.28%	13.64%
Commercial buildings	33.92%	45.98%	20.10%
Construction sites	31.14%	48.23%	20.62%
Full Time	Very good	Needs some improvement	Needs much improvement
Street shoulders	69.40%	27.20%	3.40%
Residential area entrances	51.33%	26.65%	22.02%
Vacant lots	42.37%	43.66%	13.97%
Commercial buildings	30.89%	43.59%	25.52%
Construction sites	29.29%	44.29%	26.43%
All Part Time	Very good	Needs some improvement	Needs much improvement
Street shoulders	66.04%	31.78%	2.18%
Residential area entrances	66.35%	29.25%	4.40%
Commercial buildings	40.95%	51.75%	7.30%
Vacant lots	35.18%	57.33%	7.49%
Construction sites	36.05%	49.53%	14.42%

Table 16 Question 13 Resort Membership

Question 13 Respondent Resort membership status								
Number of Respondents per category	1279	880	324	212	871	196	590	407
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Yes	75.0%	75.3%	81.2%	77.8%	74.2%	75.5%	71.5%	80.1%
No	25.0%	24.7%	18.8%	22.2%	25.8%	24.5%	28.5%	19.9%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%