



# Lakewood Ranch<sup>®</sup>

Community Development Districts  
Homeowners' Associations

— POSITION RE-OPENED —

Executive Director | Apply by January 21, 2022



The original portion of Lakewood Ranch is largely covered by the Lakewood Ranch Inter-District Authority while the remainder—the more recently developed sections and where future growth will occur—is covered by a separate governmental entity, the Lakewood Ranch Stewardship District. Together they comprise the bustling and growing master planned community known as Lakewood Ranch (LWR). Overall, they cover 48 square miles.

LWR is 10 miles northeast of Sarasota, 13 miles southeast of Bradenton, and an hour south of Tampa. It is an award-winning multi-generational community boasting a unique mixture of residential areas, education campuses, community parks, nature preserves, and health and wellness-focused facilities. With ample opportunities for water activities, nature exploration, and community building, Lakewood Ranch is an ideal place to live and work.

Ranked as one of the top 100 planned communities in the US by ideal-LIVING since 2018, Lakewood Ranch has also been listed as one of the 50 best master-planned communities in the US by Where to Retire (2019) and as the #1 multi-generational community in the US by RCLCO Real Estate Advisors (2019, 2020 and 2021). Indeed, Lakewood Ranch is well suited for everyone.

When envisioned, its focus was to create an outstanding quality of life for its residents. Its many well-maintained parks and 150 miles of trails are but one example of how this vision was brought to pass. They make it easy to find a place to walk, hike, bicycle, play sports, or have a picnic. For those with young families who are young at heart, Greenbrook Adventure Park and Summerfield Community Park are popular locations. Avid fishermen and birdwatchers will enjoy exploring the 110-acre Heron's Nest Nature Park. Water lovers will find the James L. Patton Community Park is an excellent place for activities such as canoeing and kayaking.

Cyclists will enjoy the annual Gulf Coast Cyclefest, which features different course lengths and degrees of difficulty. A little to the north is the Premier Sports Campus, a 140-acre campus with 23 FIFA-regulated fields and a stadium seating over 3,000 individuals. Its facilities are used for sports programs, training, camps, and tournaments for people of all playing levels. Golfers have many opportunities with half a dozen nearby courses. Difficulty ranges from residential courses to the nationally recognized private golf clubs, such as the Lakewood Ranch Golf & Country Club (membership required), The Ritz-Carlton Golf Club, and the renowned Concession Golf Club.

Its many activities have led Lakewood Ranch to be recognized by ideal-LIVING as one of the top 100 "Best Health and Fitness" and "Best Wellness

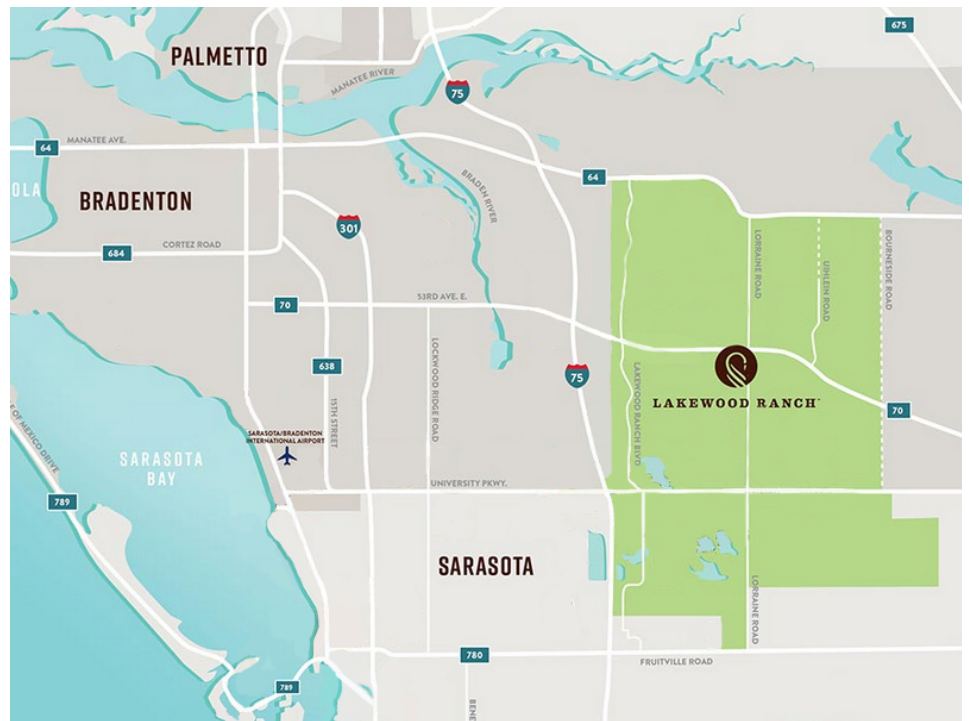
Environments" communities in the USA in 2019 and 2020, respectively. Lakewood Ranch is the largest green certified community in the nation according to the Florida Green Building Coalition (FGBC).

LWR boasts three primary shopping areas. Lakewood Ranch Main Street offers stylish boutiques, international restaurants, outdoor cafes, and the Lakewood Ranch Cinemas. It provides an open-air environment for strolling and shopping, special events, and concerts and festivals throughout the year. The area is also home to Music on Main, where the community comes out for a free concert series and block party, on the first Friday of each month. The Green at Lakewood Ranch is a 37-acre development featuring more than two dozen businesses, restaurants and apartment residences. The partially opened Waterside Place will include apartments, restaurants, retail shops, and offices. It will have a fully programmed events calendar, and, in a few years, will be home to the Players Centre for the Performing Arts. Recently relocated to Waterside Place, families and individuals love exploring the Farmer's Market on Sundays. "Ranch Nite Wednesdays" is an enjoyable event with night markets, activities, food trucks, and music performed by local artists.

It is important to remember, however, Lakewood Ranch is a community first and foremost. It is a welcoming place where people are friendly and neighbors help neighbors. People have values and take pride in the appearance of their community. It is composed of 25 different villages—or main neighborhoods. Most are multi-generational. Prices range from a low of \$250,000 to over \$3,000,000 and are increasing rapidly. Realtor.com has found a year-over year increase of 31.6% in home values as of September 2021. A 2,200 square foot 3 bedroom/2 bath will likely cost almost \$500,000. The good news is since LWR is not part of a city, there are no

municipal taxes, and Florida does not have a state income tax. Also, good news is the properties are built to withstand hurricanes (even though they are rare here) and at an elevation so they do not flood in extreme weather events. Crime is 9% lower than the national average and 21% lower for violent crime (per RealEstateAgent.com). Most crime, frankly, is property crime. Health care is readily available (among other opportunities, the community has 120-bed hospital) and in nearby Sarasota.

Figure 1: Location of Lakewood Ranch, FL



Within the Ranch, families with preschoolers have many options, and those with older children similarly find an abundance of excellent private and public schools. Depending on the grade, classes are typically small with one teacher for every 16–25 students. Students who apply themselves can get an outstanding education. For example, Lakewood Ranch High School has a 95% graduation rate and is well known for its success in preparing students for college, having earned a College Success Award in 2018 (GreatSchools.org). Moreover, those seeking higher education do not have to look far. Lakewood Ranch is home to nine college campuses, including the State College of Florida and Keiser University. The private Lake Erie College of Osteopathic Medicine offers programs in dentistry, pharmacy, and medicine. Students can easily drive an hour to study at the University of South Florida in Tampa. The University of Central Florida (the largest public university by attendance in the United States) is approximately three hours by car to the northeast in Orlando. The University of Florida is about 175 miles north in Gainesville.

The only things you may not find in Lakewood Ranch, you will find nearby. Several outstanding Gulf Coast beaches are within a 40-minute drive. Tampa is an hour north and offers numerous cultural, recreational, and sporting activities. It is home of the NHL's Lightning Bolts and NFL's Buccaneers. Neighboring St. Petersburg is home to MLB's Tampa Bay Rays. Orlando is two hours to the northeast with its famed Disney, Universal Studios and SeaWorld theme parks. A bit closer is Legoland in Winter Haven.

For the traveler, Sarasota-Bradenton International Airport is 20 minutes away and Tampa International Airport is 40 minutes further. When cruising fully returns, the Port of Tampa hosts numerous departures to Mexico and the Caribbean. Port Canaveral (170 miles east) is the second busiest cruise port in the world.

Overall, Lakewood Ranch provides many amazing possibilities for those wanting wonderful opportunities for family time, health, work, and an

excellent quality of lifestyle. Of course, the Lakewood Ranch Inter-District Authority Executive Director position is a great professional opportunity so please apply!

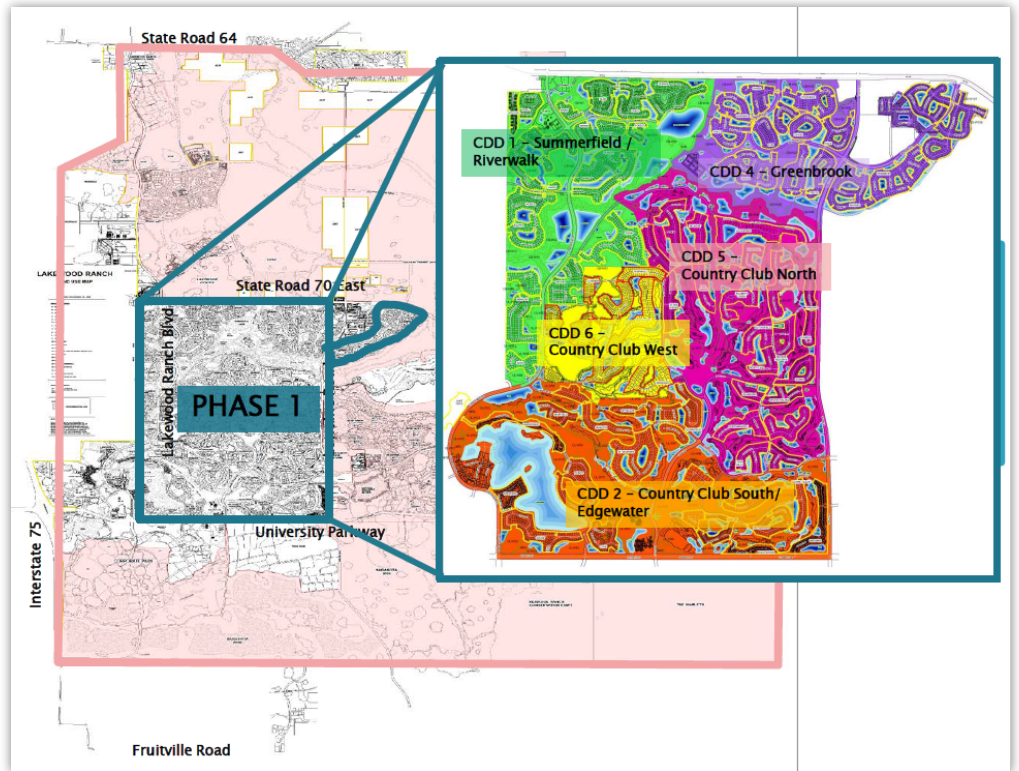
## HISTORY

Lakewood Ranch's history began in the early 1900s as the Schroeder-Manatee Ranch (SMR). In 1922, the Uihlein family purchased the land for ranching purposes. These operations also included aggregate mining and timber farming.

When, in 1977, the Sarasota Manatee Airport Authority wanted to build a new airport to the west of the SMR, the Ranch's owners saw an opportunity, and developed plans to build a community. Although the Airport Authority never materialized, SMR moved forward with its efforts.

In 1989, the area was established as a development of regional impact. By 1994, the SMR started construction and finished its first neighborhood in 1995. The infrastructure for it and the next five developments (together referred to as Phase I) was to be overseen by six community development districts (CDDs). The Lakewood Ranch Inter-District Authority (LWR IDA) was formed in 2002 to manage and maintain the assets of Districts 1 through 5. District 6 joined in 2006. District 3 (composed of commercial properties) was dissolved in 2008 and withdrew. Three HOAs have also contracted with the LWR IDA for management services. In 2005, Florida legislature established a second authority, the

Figure 1: Location of Lakewood Ranch Inter-District Authority's Boundaries within the Lakewood Ranch Community / SMR Ranch



Lakewood Ranch Stewardship District, to support development within the Ranch and surrounding the IDA.

As of 2020, the area had grown to almost 18,000 housing units and a population approaching 35,000.

## DEMOGRAPHICS

Demographic data for Phase I of Lakewood Ranch, which the Inter-District Authority manages, is not available. The Census refers to the overall area as a census-designated place and as such, provided limited data. See Table I on page 5. As an aside, we suspect the population of Phase I is a bit younger than the average age of 47 displayed below since the Lakewood Ranch Stewardship District contains several communities restricted to those age 55 and over.

Table 1: Lakewood Ranch Demographics

Distribution by Race		Other Statistics	
White	83.5%	Median Age—Lakewood	47.0
Black	2.4%	Median Age—U.S.	38.5
Asian	3.8%		
Other/2 or More Races	10.4%	Hispanic Ethnicity (all races)	8.3%
<i>Estimated Population: 34,877</i>			

U.S. Census Bureau and Lakewood Ranch Fact Sheet

## CLIMATE

Typical of much of Florida, Lakewood Ranch has a humid subtropical climate. Its dry season is between October and May, while its rainy season runs from June to September. Winters are mild with daytime highs in the mid-70s and nighttime lows in the 50s. Frost is exceptionally rare. Summers are hot and humid. High temperatures are generally in the low 90s with lows in the 70s.

Average annual rainfall is 53.9 inches. Hurricanes strike Florida from time to time, especially from August through mid-October. Even if one were to strike, being inland would spare the area of the most significant impacts. Plus, if you are more than 50 miles from a hurricane’s center, it will probably not materially affect you.

## GEOGRAPHY

Lakewood Ranch is located in peninsular Florida in Manatee County with a small section extending into Sarasota County. LWR is part of the North Port-Bradenton-Sarasota Metropolitan Statistical Area and it covers approximately 48 square miles (30,720 acres). The CDDs that the Lakewood Ranch IDA manages cover about 5,000 acres. The elevation of the area averages about 30 feet above sea level.

To the southwest of Lakewood Ranch lies Sarasota and due west about 15 miles is the Gulf of Mexico. One hour north by car lies Tampa/St. Petersburg, and two hours to the northeast is Orlando.

## COMMERCE

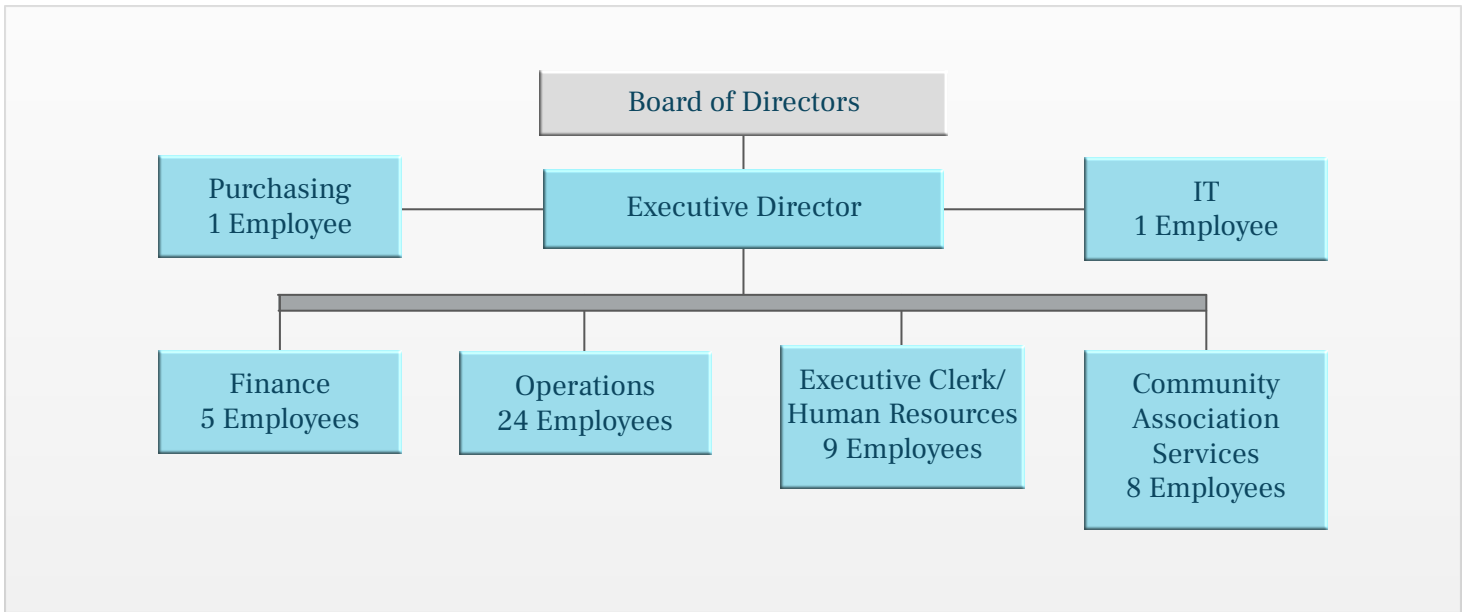
Lakewood Ranch has a bustling commercial base of over 1,800 businesses with over 17,400 employees. The businesses are a diverse group ranging from finance and insurance to healthcare, retail, professional/technology, hospitality, warehouse and industrial, and construction. The area has 12 vibrant and varied business districts that include over 350 shops, eateries, and services. Further, there are proposals for 5.6 million square feet of current commercial development and entitlements which will eventually increase to 14.3 million square feet. A great deal of property remains undeveloped within the Schroeder-Manatee Ranch boundaries, and will that the area’s eventual population is expected to be approximately 60,000.

The land within the boundaries of the Lakewood Ranch Inter-District Authority is almost exclusively residential. Those who do not work in the Lakewood Ranch Commercial Park area generally commute to the Sarasota-Bradenton area.

## THE GOVERNMENT

Lakewood Ranch Inter-District Authority operates under Florida Statutes 163.01 and 190.011 and was formed in 2002. It provides administrative, financial, operations and maintenance support to five community development districts (CDDs) and three homeowners associations (HOAs). It is important to note that, given the statutes the IDA is organized under, its powers are extremely limited—essentially, the construction, maintenance and financing of the infrastructure in support of the CCDs they manage.

Figure 2: Lakewood Ranch Inter-District Authority Organization Chart



The Authority’s Board is composed of five members, and each is appointed by one of the five individual CDD Boards. The votes of the Board Members are weighted by the number of units in their CDD’s. The IDA Board Members tend to be long tenured. The current chair has served on the IDA Board since 2008 and a second board member since 2010. Two joined the Board in 2015 and one in 2019. The Board Members are intelligent, work well together and hold the staff in high regard. They expect the Authority to operate in an efficient and effective manner.

The Authority follows the council-manager form of government where the day-to-day operations are overseen by the Executive Director. The key staff members reporting to the Executive Director are the Chief Financial Officer, Director of Operations (who oversees the maintenance of all the IDA’s infrastructure and that of the member districts—primarily, roads, drainage, landscaping, street lighting and the like), Director of Community Associations Services (who oversees the management of the three HOAs) and the Executive Clerk-HR Generalist. Overall, the Authority has 49 permanent staff. The Board believes the staff is very strong and

capable. None of the employees are unionized See Figure 3 for more information.

Financially, the Authority is a complex entity. Residents pay assessments to the CDDs based on the services they receive. Simplifying, in a city, the tax rate is calculated by dividing the money needed by the ad valorem value. In CDDs, the numerator varies from district to district and can vary within a district as some areas may have more infrastructure debt and/or services than other parts of the CDD. The denominator is equivalent dwelling units (EDU). In the HOAs, a similar calculation is performed. In a sense, it is retail government where you and your neighbors receive. only the services you pay for. The result is that the Authority issues 25 different financial statements each month, which include the Maintenance Free Neighborhoods within the HOAs.

Each property has its own HOA fees as well as a Community Development District assessment. Combined CDD assessments Operations, Maintenance and Debt Service) range from \$150 to \$6,000 annually. Annual HOA fees vary between \$44 and \$129, with Maintenance Free

Neighborhoods assessments averaging between \$127 and \$256 per month.

The IDA's FY 2022 Budget is \$4,402,310. In terms of revenue, \$3,045,680 is contributed by the CDDs and \$866,970 from the HOAs. The remainder comes from other sources. The IDA also oversees the individual CDD budgets that total \$15,842,449 and the individual HOA budgets that total \$3,516,384.

## THE CHALLENGES AND OPPORTUNITIES

The IDA is well managed and financially strong. The Board Members have the best interests of the community at heart and are public service oriented. The staff is composed of individuals who are knowledgeable and very capable. That said, the LWR IDA does have a few minor challenges.

The first challenge is that, while the properties within the five CDDs that the IDA manages are built out, the property within the surrounding Stewardship District is not. In fact, as previously noted, the area's population is expected to double to around 60,000 when the project is completed. The question is how the IDA can, with its limited powers, help protect its residents' quality of life.

The second challenge, the Authority oversees five CDDs and three HOAs. The finances of the operations add another layer because assessments vary with the cost of the specific infrastructure improvements within each community. In other words, while the operation is very manageable, it has some complexity.

Internally, as noted, the operation is well run. An area of weakness, however, is the IDA's use of technology. It is felt it can be improved.

Externally, some in the overall community have given consideration to incorporating Lakewood Ranch as a

city. While not an immediate issue—the last time it was considered seriously was 2008—it is something to be aware of and that could happen in the long term. Logically, if incorporation does occur (again, it is not something that is likely to happen in the near future, the LWR IDA Executive Director would be well situated to become the appointed CEO of the new city.

## THE IDEAL CANDIDATE

The Authority is looking for an outstanding leader and a manager with a demonstrated track record of accomplishment, someone who works well with people, and someone who will represent the IDA in a positive light. The next Executive Director will be honest, ethical, friendly, approachable and upbeat. He/she will be someone people enjoy being around and respect as a leader. The individual will be a strategic thinker, always looking for ways for the IDA to better serve its residents and to become more efficient. He/she will grasp problems quickly, analyze them, and arrive at solutions.

The ideal candidate will be experienced and work as a partner and trusted advisor to the IDA Board. The individual will work diligently to keep everyone informed so there are no surprises. He/she will believe strongly in transparency. With five CDDs and three HOAs, the next Executive Director will be comfortable juggling priorities, attending meetings, and working with many people. The individual will also work well with those who are new to elected office, help them understand their roles, and provide assistance as needed. He/she will be an outstanding negotiator, who encourages involvement and consensus, but also someone who is decisive when appropriate and/or necessary.

The individual will have excellent communication skills and realize the most important aspects of communication are often patience and listening—



truly hearing what others have to say and making everyone feel their views are understood. He/she will be able to assess personalities and react accordingly. The ability to build bridges among the different boards and groups, to understand their concerns, and then to address them in a meaningful way will be critical.

The Executive Director will be positive, have a strong backbone, and realize that the life of a local government manager is not always smooth. He/she will understand that questioning and criticism (sometimes unfair) come with the job. In response, the individual will be calm, patient, confident in his/her abilities, resilient and not let negative comments bother them personally. In other words, he/she will have a thick skin. The ideal candidate will also have a good sense of humor and know how to use it to diffuse tense situations.

The individual will place a great deal of importance on resident service and lead by example. While he/she will recognize you cannot make everyone happy all the time and that the customer is not always right, the individual will stress that residents deserve an honest effort made to address their concerns. When a solution cannot be found to their problem, an explanation of why will be given. He/she will provide a realistic answer and not over promise in terms of what can be done or when. He/she will be able to say no without upsetting residents.



The Executive Director will be forward thinking, plan ahead, and be organized. He/she will be able to anticipate the future and position the IDA to take advantage of opportunities while avoiding pitfalls.

The ideal candidate will not be a caretaker but rather someone who is always striving for improvement. The individual will encourage creativity and reasonable risk taking while realizing that not every seemingly great idea will succeed. The Executive Director will be a strong mentor and manager. The IDA has an excellent staff so the new Executive Director will set priorities, make assignments, provide resources, and then allow the staff to do their jobs without micromanaging. At the same time, he/she will expect to be kept informed and be ready to jump in to assist when necessary. The IDA has a small staff, after all.

The ideal candidate will have 10 years' experience, some of which will be managing special districts. He/she will have at least a bachelor's degree in business or public administration, engineering or a field related to the work carried out by the IDA. He/she will work well with other governmental entities. Experience in Florida and with HOAs would be definite pluses as would be knowledge of the Sunshine and Public Records Acts.

Finally, the best candidate will be someone who recognizes what a wonderful opportunity being the Executive Director of the Lakewood Ranch Inter-District Authority is and plan to stay at least five years.

#### COMPENSATION

The salary range is \$117,864 to \$188,593. Actual compensation will be commensurate with the knowledge and experience of the selected candidate. Benefits are very good. The Executive Director has a 457 plan for retirement purposes.

#### THE MOST RECENT EXECUTIVE DIRECTOR

The prior Executive Director served for five years before moving over to become the Executive Director of the Lakewood Ranch Stewardship District.

#### INTERNAL CANDIDATES

There may be an internal candidate. That said, the Board is committed to a level playing field and everyone will be evaluated on their own merits.

#### RESIDENCY

Residency is not required within the boundaries of the Lakewood Ranch Inter-District Authority, but it is anticipated that the Executive Director will at least live nearby.

#### HOW TO APPLY

E-mail your resume and cover letter to [Recruit35@cb-asso.com](mailto:Recruit35@cb-asso.com) by January 21st.

Questions should be directed to Colin Baenziger at (561) 707-3537 or Stephen Sorrell at (513) 317-0678.

#### CONFIDENTIALITY

Under Florida's public records act, once an application is submitted, it is deemed a public record. As a practical matter, the Executive Director position is relatively low profile, and we would be surprised if this search received any media coverage.

#### THE PROCESS

Applications will be screened as they arrive. We anticipate interviews taking place in early March. A selection will be made shortly thereafter.



## OTHER IMPORTANT INFORMATION

The Lakewood Ranch Inter-District Authority is an Equal Opportunity Employer and strongly encourages women, minorities and veterans to apply. A veteran's preference will be awarded per Florida law.

## ADDITIONAL INFORMATION

For additional information about the Lakewood Ranch and its Inter-District Authority, visit:

[lakewoodranch.com](http://lakewoodranch.com)

[mylwr.com/496/Inter-District-Authority-IDA](http://mylwr.com/496/Inter-District-Authority-IDA)

[mylwr.com](http://mylwr.com)

