

ADDITIONAL QUESTIONS FOR ALL CANDIDATES

- 1. Do you believe any services or functions currently provided by outside contractors should be taken over internally by the UPRD? If so, what functions and who would carry out those functions?**

Ron Simon

"Of course we should take over services or functions where (1) we are able to do it easily and (2) where it is economically beneficial to the residents."

Bill DiPaolo

"Yes. A lot has been learned the past year and outside help was needed. With the experience gained, we should now be able to move many of the District management responsibilities "in house." It would also seem feasible that the necessity for legal counsel could be reduced. Many District expenses will be reduced by taking swift action now and moving to quarterly meetings in about 9 months."

Sondra Ettlinger

"Yes, I believe some functions provided by outside contractors could be assigned to carefully chosen volunteer committees made up of the many talented residents of University Park. Further, I believe some vendor services need to be put out for new bids. This is a place I feel my organizational, research, communication and strategy skills could be greatly beneficial to the RD Board."

Steve Ludmerer

"We need to consider whether District Management or portions of that service can be taken over internally. Many District Manager functions are specialized and require in-depth knowledge of FL Special District rules. We do not have the skill base to internalize these functions and would need to recruit a local candidate."

Karen Pagano

"Yes, I'd advocate for bringing all District Management work internally. We can expand the General Manager's role to include many of District Management's current functions and shift some of the general Manager's current responsibilities to a newly created professional assistant role. We can utilize a consulting firm on an as-needed basis."

Jim Case

"Some functions previously provided by outside contractors have or are being taken over internally by UPRD such as accounting and some of the administration. Further administrative and regulatory work could be brought inside in the future but the heavy work involved planning for physical plant improvements in the facilities of the club suggest we fully integrate the activities to which we are already committed before taking on further burdens internally."

Sally Dickson

"The move I will immediately champion is to transition away from Orlando based PFM for the District Management duties. These responsibilities will best be served by Laurie Evans as part of her new role, particularly with the management breadth that has been developed under her direction."

David Murphy

"The major outside services are the PFM Consulting Group and legal. We should review the current PFM agreement to determine if any of their functions could be brought in house, lowering their annual charges. Outside legal service might be reduced (not eliminated) depending on the composition of the RD Board going forward. "

Nancy Kopnisky

"The financial function has already been brought internally which has saved the District a substantial amount of money. District Management and Council are two areas for discussion. Because of the complexity of a District I do not believe that we can bring these two areas internally. I would support the Board's consideration of management companies that are local, as well as, council services that can provide the services required at lesser fees."

2. My belief is that the golf and tennis operations should be self-supporting (both operating and capital expenditures) and not subsidized by the residents who are not members. What is each of the candidates' philosophy on this issue?

Nancy Kopnisky

" These two areas are self supporting and as a promise to the residents early on; the District would not require non members to subsidize these areas."

This aesthetically pleasing open space benefits every resident's quality of life. The totality of offerings at UPCC provides choice to our members and increased value to our homes."

Sally Dickson

" That is desirable and reflected in the annual budgets.

*unforeseen circumstances, (pandemic, weather related closings, etc) do throw a wrench into the best laid plans. Laurie and her team have handled 2020 with financial effectiveness while preserving as many services as possible for our members.

*new revenue streams will help diversify our income producing capabilities.

*look at fees for our public guests; justify higher rates while maintaining a competitive edge as the most desirable club to visit/join.

*residents who are not members derive property value from golf and tennis so they cannot be completely overlooked when circumstances warrant, but always after thoughtful consideration of any financial burden."

Karen Pagano

" Our community was built around the golf course. Golf, tennis, and other sports make up the character of UPCC. While not all participate in the sporting aspect of our community, we all benefit from the beauty and reputation of living in a country club with beautiful golf-course surroundings. I feel golf and tennis operations should be self-supporting, but a small subsidy is reasonable to maintain the community's ambiance. I am AGAINST any type of special assessment for enhancements."

Steve Ludmerer

" It is complex to allocate Club dues to specific facilities and amenities. The Club operates with an annual surplus which provides some of the capital needed for the longer term. A modern up-to-date Club will add to the value of our homes. I believe all homeowners should view themselves as 'owners' of the Club and seek to maintain its premier status."

Sondra Ettlinger

" At the front entrance is a sign that does not say University Park, it says University Park COUNTRY CLUB. I believe all residents, members and non-members of the Golf, Tennis, and Fitness units benefit from having these amenities and all should share in their cost because they positively impact home values. A Strong Country Club feeds a strong Community which feeds all residents."

Jim Case

" It appears that golf activities are self supporting and profitable at this time. Income from tennis and fitness programs are not separately identified. These are all amenities which the members enjoy along with dining and other social activities. Not all amenities will be self supporting at any given time and some may never be. The fitness center is well utilized but no income is associated with it except for classes. Croquet is enjoyed by many but provides no direct income to the club. Residents who are not club members can enjoy club activities as guests of members but are not assessed. Grandfathered residents are not required to join the club under our governing documents."

David Murphy

" We are members of one community. My goal is to help provide the same high level of experience, engagement and satisfaction across all memberships. Golf shows a loss because of the cost of maintaining the course, not direct operations.

Ron Simon

" I also believe that both golf and tennis should be self-supporting, actually they should be able to produce a profit. Most clubs these activities do produce surpluses to support other functions like restaurants, café's and bars."

Bill DiPaolo

" Non-members of the Club should not have to bear any assessment for any service or facility that they are not able to enjoy. These non-members are already paying an annual assessment to help maintain the quality of life at UP. Golf, tennis, restaurant, fitness center financial requirements should be the responsibility of the members."

3. Would it be your intent that, except for required repairs, you would not approve spending funds on programs, enhancements, upgrades or improvements that would require funding from additional assessments or increased member fees, beyond normal cost of living increases?

Ron Simon

" Additional assessments, unless caused by an act of God or some unforeseen cause, should not be considered. I would try by every means possible to avoid them."

Karen Pagano

"It is the RD's responsibility to manage funds and budget appropriately for capital improvements. Therefore, I would be AGAINST additional assessments or an unreasonable increase in member fees for non-budgeted items, except for unexpected required repairs."

Sally Dickson

" This would be my intent, based on:

- * Study at a deeper level, the basis for our income projections, our available funding, and our identification of 'must haves' vs. wants (which will come out of the Strategic Planning process).
- * Look outside for new/additional funding from our public guests first, while delivering on our brand promise.
- * If assessments are deemed necessary, they will be well thought out and conservatively approached."

Jim Case

" I believe that the RD has no funds other than those funds entrusted to it by residents and members and every spending decision must be evaluated from the perspective of what value is being secured for those constituents. Maintaining a high quality experience at the Club will require enhancements over time beyond simply repairing our current facilities. There are funds available from the bonds. The RD has begun the process of planning and prioritizing the utilization of those funds. That process should move us into the future in good stead but those funds will likely not be sufficient over the long haul to maintain the lifestyle we want to continue to enjoy."

David Murphy

" I am fiscally very conservative but serve as a representative of club members of all types. If an overwhelming majority wanted a program or improvement and were willing to pay the assessment I would honor their request. It is your club and your \$'s."

Steve Ludmerer

" We want current and future buyers to choose our Community and we want to increase home values. We will only accomplish those objectives if our Club offers a variety of engaging lifestyle experiences with exemplary facilities, amenities and service. The capital required to achieve those objectives can only come from members, guests, and residents. I don't know any other sources."

Nancy Kopnisky

" I would like to hold the expenditures of improvements to the present amount that the bond has provided for. I would not approve spending funds arbitrarily, however, should further improvements

be required beyond this amount the board should approach the membership for input as to what those improvements are and how they would benefit the members and Club for present and future use."

Bill DiPaolo

" The current Board has already approved a small dues increase and a special assessment to begin in January. I am opposed to that assessment and would like to see it reversed until financial need is clearly demonstrated. While a promise of no assessments ever is not possible, it would be my intent that there be none in the near future. There is over \$3 million currently available for capital projects. It's time to stop spending on consultants and start spending on the club."

Sondra Ettlinger

" It is too soon to assess my intent for approval or withholding approval of spending funds on any project at this time, until I study the specifics. That said, however, if the severity of a need was a major detriment to the community, I would *consider* any and all appropriate means of funding it. I would encourage the board to consider cosmetic changes on their ability to pay for themselves in the long run."

4. The previously elected Board of Supervisors adopted an equally weighted assessment allocation as the most equitable option. The allocation methodology apportioned 50% of the annual debt service cost on an equal pro rata basis to all 1,202 homes in URPD. The remaining 50% was allocated on the market value of homes as of a fixed date. This criteria recognized that it was reasonable and appropriate to take into account that more valuable homes derive more special benefit in dollar terms than less valuable homes. If there is ever a need for any type of future assessment, will you pledge and commit to follow the same equally weighted assessment allocation for any and all future assessments?

David Murphy

" I would follow the equally weighted assessment allocation for any and all future assessments. This formula was created after thorough evaluation of options and I agree it is the best choice."

Karen Pagano

" Yes. When the previously elected Board of Supervisors developed the assessment methodology, they did so with much research--examining different scenarios, weighing other options, and taking a holistic approach to the task. They utilized the experience of board members, fellow residents with significant knowledge and expertise, and professionals in the industry. I would pledge and commit to following the same equally weighted assessment allocation."

Steve Ludmerer

" I personally believe that the 50/50 assessment allocation for the Series 2019 Bonds was appropriate and equitable. The purpose of any future Assessment, with input from owners and residents, would be taken into account before I supported any future Assessment or Assessment Methodology."

Nancy Kopnisky

" I believe that the allocation was fair and equitable and would commit to follow the same option."

Sondra Ettlinger

" I would not pledge and commit to follow any allocation methodology adopted by the previously elected Board of Supervisors until I had thoroughly studied that option along with any other options which might be found more equitable in the future. Committing at this time would be premature."

Sally Dickson

" While I cannot pledge to something without full knowledge of all details, I believe that this allocation model is appropriate and fair to the homeowners."

Ron Simon

" Yes, I commit to the methodology, agreed to by the committee and the residents (and I do think it's fair), unless another one with more equality is agreed upon by all is proposed and accepted."

Bill DiPaolo

" Yes. For any resident-wide assessment that would be required, though I don't see that on the horizon, I would want to apply the same formula. However, in the event of member only assessments, these would more likely be done on a membership class basis."

Jim Case

" The "equally rated assessment allocation" was adopted by the initial Board of Supervisors and, importantly, approved by the residents at referendum. I respect the voice of the residents at that referendum and would not change it unless a future referendum by our residents compels that change."

What experiences and skills do you offer that would be valuable to managing construction/infrastructure improvements for our community facilities?

David Murphy

I supervised the buildout of a footwear factory in the Caribbean that employed 1,800 people. I served on the Executive Committee that had construction oversight of a LEED Certified office building and a LEED Certified distribution center. I am familiar with the LEED certification process. Having served as President of four companies with sales up to \$250 million I have a very thorough understanding of financial matters, budgeting and the imperative for timely completion of projects.

Jim Case

As a partner in a small real estate investment firm I participated in land acquisition decisions, managed subsequent parcel identification and marketing. I helped oversee the construction of a 12000 square foot office building and the leasing of same. And recently the marketing and sale of that building.

Sondra S. Ettliger

As the Company Inspector for Racetrac, I ran the final inspection on new store construction before the store was allowed to open. My report of the facts found was then interpreted by the Company Officers and they decided whether or not the store was ready for the public. I believe the RD board should be made up of Supervisors, not those who actually do the tasks. The Supervisors need to develop teams of knowledgeable resident experts to advise them rather than relying only on the advice of the individual members of the RD Board.

Bill DiPaola

As indicated in my bio, I have managed many large construction projects – large and small. Included was complete remodeling of 30,000 sq. ft. restaurant and catering facility. Also had responsibility for overseeing food service operations that included a private dining club.

Steve Ludmerer

The role of a Supervisor is to put the staff and systems in place to manage construction and infrastructure improvements, not to 'manage' the projects themselves.

Karen Pagano

Successfully managing a construction/infrastructure task requires a plethora of skills. My experience and background include many of the key attributes needed: Analytical Skills; I can problem solve using innovative & creative thinking while remaining level-headed to work out any issues that arise; Team Management, I have been an effective team leader for many projects of varying types; Communication Skills, I possess the communication skills to express what is needed for the project competently.

Sally Dickson

My management of large and small companies has encompassed all aspects of operations, capital expenditures, office buildouts, etc. Each requires financial scrutiny to ensure an appropriate investment. I will apply my analytical skills toward maintaining fiscal oversight of such projects. Naturally we will carefully assess the capabilities of the experts with whom we contract to do the work.

Nancy Kopnisky

I have previously served on a homeowner association and an architectural committee which dealt with construction issues and associated costs. My husband and I have built thirteen (13) homes, eleven (11) of which were from the ground up; through this experience I have gained a knowledge of managing construction. For those issues that I may not be familiar with I would consult with those more knowledgeable than myself. The key is to oversee the information presented and make an informed judgement.

Ronald Simon

I have been involved in audits of construction companies who have built, shopping centers, K-Marts, apartment buildings, strip centers, industrial buildings and other types of construction. I have also made investments in developing land and rental properties, including retail centers and residential properties. I have also had clients that as their primary businesses have owned shopping centers, industrial properties, and multifamily residential units.

