

University Park Recreation District

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The regular meeting of the **Board of Supervisors of the University Park Recreation District** will be held on **Tuesday, August 4, 2026, at 2:00 PM** at the Business Offices, 8301 The Park Boulevard, University Park, FL 34201 and virtually.

Meeting ID: 648 161 1158

Passcode: 597609

Join meeting via Zoom:

<https://us02web.zoom.us/j/6481611158?pwd=eWEwQ01tWUFSNDJRTUpNbCtoQmpHUT09&omn=84588938513>

Join via mobile:

+16469313860,,6481611158#,,,*597609# US

+19292056099,,6481611158#,,,*597609# US (New York)

BOARD OF SUPERVISORS' MEETING AGENDA

Organizational Matters (2:00-2:15PM)

- Call to Order
- Roll Call to Confirm Quorum
- Public Comment Period *[for any members of the public desiring to speak on any proposition before the Board]*

Administrative Matters (2:15-2:20PM)

1. Consideration of Minutes:
 - a. June 23, 2026, Board of Supervisors' Special Meeting
 - b. June 30, 2026, Board of Supervisors' Meeting
2. Public Records Request Summary List
3. Correspondence Summary List

Staff Report Matters (2:20-2:30PM)

4. District Counsel
5. District Manager
6. Club Management
7. Committee Reports
 - a. Finance
 - b. Strategic Planning

New Business Matters..... (2:30-2:45PM)

8. Discussion of Appointment of Board Member Seat 3 Vacancy
9. Nominations / Appointment of Governance Committee Members

Old Business Matters..... (2:45-3:00PM)

10. Consideration of Proposals for General Manager/Chief Operating Officer Search
 - a. Overview of General Manager Role
 - b. Kopplin Kuebler & Wallace
 - c. Strategic Club Solutions
11. Nominations / Appointment of Strategic Planning Committee Member

District Financial Matters (3:00-3:02PM)

12. Ratification of Payment Authorization Nos. 165 & 166

Date	Meeting Type	Time	Location
August 11, 2026	Board of Supervisors' Rescheduled Meeting	2:00 PM	University Park Business Offices
August 24, 2026	Special Board of Supervisors' Meeting	9:00 AM	University Park Business Offices
September 1, 2026	Board of Supervisors' Meeting	2:00 PM	University Park Business Offices
September 11, 2026	Board of Supervisors' Meeting	2:00 PM	University Park Business Offices
September 29, 2026	Board of Supervisors' Meeting	2:00 PM	University Park Business Offices

13. Supervisor Comments & Future Agenda Items(3:02-3:10PM)

Adjournment



University Park Recreation District

Consideration of Minutes:

- a. June 23, 2026, Board of Supervisors' Special Meeting**
- b. June 30, 2026, Board of Supervisors' Meeting**

MINUTES OF MEETING

UNIVERSITY PARK RECREATION DISTRICT BOARD OF SUPERVISORS' SPECIAL MEETING

Tuesday, June 23, 2026

2:00 p.m.

Business Offices

8301 The Park Boulevard, University Park, FL 34201

Board Members present in person or via phone:

Steve Heitzner	Chairperson	
Scott Huebner	2 nd Vice Chairperson	
Gregory Selep	Board Secretary	(via Zoom)
Steve Swanson	Treasurer	

Also, Present in person or via phone:

Vivian Carvalho	District Manager – PFM Management Services LLC	
Kwame Jackson	ADM – PFM Management Services LLC	(via Zoom)
John Fetsick	General Manager - Country Club	(via Zoom)
Marisa Powers	District Counsel – Blalock Walters	(via Zoom)

Various Audience Members in-person and via Zoom

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call, and Pledge of Allegiance

The meeting was called to order at 2:11 p.m. by Ms. Carvalho. Those in attendance are outlined above.

The Pledge of Allegiance was recited.

Public Comments

There were no public comments at this time.

Mr. Heitzner spoke regarding the structuring of PBM, UPRD and the UPCA. It was noted that previously PBM has taken care of employment, payroll, and operations of the Club. The PBM Management Committee, consisting of Mr. Wood, Mr. Christopher, and Mr. Murphy, is now eliminated and has been replaced by the OCAC. These members will be appointed by the UPCA and will eliminate the authority that PBM had previously. This authority will now be with UPCA. It was noted there was no communication with the UPRD Board regarding this situation.

It was noted that Mr. Fetsick has resigned. His last day has not yet been determined. Mr. Heitzner thanked Mr. Fetsick for his time with the club.

A resident commented regarding the situation.

Ms. Carvalho noted that Mr. Heitzner had requested that the discussion be moved up on the order of the agenda. Any agenda items not considered today will be moved to the June 30th meeting.

SECOND ORDER OF BUSINESS

Administrative Matters

Consideration of Minutes:

- a. May 8, 2026, Board of Supervisors' Meeting**
- b. May 14, 2026, Board of Supervisors Special Meeting and Attorney/Client Session**
- c. May 28, 2026, Board of Supervisors Special Meeting and Attorney/Client Session**

The Board reviewed the minutes.

Mr. Swanson noted changes related to the Discussion of the Governance Committee Options. He noted he was not opposed to the Committee but was opposed to moving forward until a Charter was in place.

ON MOTION by Mr. Huebner, second by Mr. Heitzner, with all in favor, the Board of Supervisors for the University Park Recreation District approved the May 8, 2026, Board of Supervisors' Meeting, the May 14, 2026, Board of Supervisors' Special Meeting and Attorney/Client Session, and the May 28, 2026, Board of Supervisors' Meeting and Attorney/Client Session, with noted changes.

Public Records Request Summary List

The current Public Records Request Summary was reviewed by the Board.

Correspondence Summary List

The current Correspondence Summary was reviewed by the Board.

THIRD ORDER OF BUSINESS

Staff Report Matters

District Counsel

Ms. Powers requested clarification regarding the discussion related to the operating agreement approved by UPCA. Ms. Carvalho noted that item will be a part of the June 30th agenda.

ON MOTION by Mr. Selep, second by Mr. Swanson, with all in favor, the Board of Supervisors for the University Park Recreation District authorized District Counsel to send the Intent to Negotiate letter to UPCA.

District Manager

Ms. Carvalho reminded the Board of the Form 1 deadline of July 1. It was noted that everything is completed online.

Mr. Jackson noted the Ethics Training is recorded on the Form 1 for the previous year.

Club Management

- a. Management Discussion & Analysis Report**
- b. Consideration of Golf Advisory Group Recommended Member Tee Time Rules**

Mr. Fetsick noted the Golf Tee Time Rules will be deferred at this time.

Mr. Fetsick gave an overview of the Analysis Report, including the Club Statement of Operations, Comparative Balance Sheet, Capital Sources and Uses, and Membership.

Mr. Fetsick noted the Strategic Planning Committee will be providing him with an Executive Summary and the survey feedback will be sent out to the community.

Committee Reports

a. Finance

Mr. Crouch noted he has reviewed the document provided by Mr. Huebner regarding lowering the funding strategy.

Mr. Huebner noted he met with Mr. Crouch and Mr. Fay regarding the document. His recommendation was to charge every member \$50.00 a month to build up money to help pay for the bond. It was noted this would generate approximately \$800,000.00 a year, but it would still not cover the entire amount needed.

Mr. Huebner gave an overview of possible other recommendations that would provide alternatives to special assessments. He recommended that an extension from Regions should be requested.

Mr. Crouch noted that the bond cannot be refinanced for 10 years. It was noted that extending the loan and not assessing, would not help the issue if there is no bond.

Mr. Crouch noted the kitchen project would be completed next year.

There was brief discussion regarding postponing a few of the golf course projects in order have additional funds available. Mr. Crouch noted that \$400,000.00 worth of capital projects was already deferred this year.

Mr. Crouch reviewed the capital improvement plan and cost associated with extending the loan.

Mr. Huebner recommended having several options for residents: a lump sum payment, payment over three years, and payment over a longer period. Mr. Crouch noted that under any of those scenarios, the Capital Improvement Plan would not be able to be completed.

There was brief discussion regarding the Capital Improvement Plan. It was noted the Board wants to pay off the irrigation and move forward with the Kitchen Project. Even with the bond, there will not be enough money to move forward with other projects under their current scope. Those additional projects will be delayed.

Mr. Crouch noted that at this time, there is no way to fund the kitchen without a special assessment.

Mr. Huebner continued to review options other than assessments, this included implementing membership dues per person.

Mr. Crouch noted the bank expects to go to the tax collector for the five million dollars.

There was discussion regarding the special assessments versus other options.

Ms. Carvalho noted the Public Hearing to adopt the final budget is September 1st. The budget currently includes special assessments. The decision to extend the note needs to be determined prior to this date.

Ms. Carvalho noted the deadline for the trim notice is July 31st. It was noted the Board will order a methodology at the July 17th meeting if they choose. The Board meeting on July 28th will include approval of the methodology and the trim notice. All residents will be noticed regarding the Public Hearing and the assessments.

Mr. Crouch noted it would cost approximately \$70,000.00 to \$100,000.00 to get an extension of the loan in fees, plus interest.

There was discussion regarding the trim notice and the process of notifying residents.

Ms. Carvalho noted she will create a timeline of all dates.

It was noted that the Finance Committee meets on July 15th. Mr. Huebner requested to attend in person. Mr. Swanson will attend via phone but will not participate.

b. Strategic Planning

Mr. Freedman noted SCS will be done with their project by the beginning of October and will present their findings.

Mr. Freedman noted the Strategic Planning Committee is working on getting feedback from realtors on the Country Club's value to the homes and the Finance Committee is working on the cost of living project. This will provide subjective data.

Mr. Huebner noted he spoke with a realtor and one of the main deterrents to the community is the uncertainty of future planning.

FOURTH ORDER OF BUSINESS

Business Matters

Update of Boardwalk Project – John Fetsick

This item was deferred.

Update of Proposed Governance Advisory Committee

This item was deferred.

**Consideration of Proposal(s) for
Fitness Center Refurbishment**

This item was deferred.

**Update of Focused Technology
Proposal for Lakeside Room
Audio/Visual Equipment
Replacement**

This item was deferred.

**Continued Discussion Pertaining
to District Counsel Representation**

This item was deferred.

**Discussion of the Update
Operating Agreement Approved
by UPCA on May 15, 2026**

Mr. Heitzner noted that the UPRD can move forward with the new agreement with UPCA and they will search for a new General Manager. The second option is that the UPRD becomes its' own entity and the General Manager and staff would then report to the Board. The third option is that the District looks for a management company to run the Club. It was noted the Board is not making any decisions yet. This is a brainstorming discussion, and the Board can think about it and/or get feedback from residents.

It was noted under the current agreement that UPCA is responsible for hiring a new General Manager.

Mr. Selep noted he met with Mr. Christopher and the recommendation is to have a joint workshop with UPRD and UPCA.

There was brief discussion regarding scheduling the workshop. Ms. Carvalho noted the June 30th meeting could be transitioned to the workshop.

There was discussion regarding Mr. Fetsick's resignation.

Mr. Huebner recommended pursuing all options. He noted the least disruptive option would be that the General Manager work for the UPRD and be on the OCAC in order to represent the District, not the UPCA.

There was brief discussion regarding hiring a management company.

It was noted that the workshop needs to be finalized. The Management Agreement and the Mutual Cooperation Agreement need to be reviewed and agreed upon.

Ms. Powers noted that this meeting is to brainstorm ideas. The easiest way to negotiate and review the options is to have a joint meeting with the UPCA. It was noted that the District is not a party to the UPCA Operating Agreement, only the Mutual Cooperation Agreement. Under the Mutual Cooperation Agreement, the Board must notify UPCA and provide an Intent to Negotiate letter. This provides 60 days of negotiation and discussion.

There was brief discussion regarding the timeline of negotiation and the General Manager's duties. It was noted that currently, Mr. Nickerson is second in command after the General Manager.

The recommendation was to repurpose the June 30th meeting to be a workshop with UPCA. The Board agreed. It was noted the workshop will include discussions on negotiations and how the absence of a General Manager will be handled.

Ms. Powers will send out the Letter of Intent pursuant to the Mutual Cooperation Agreement, and Mr. Heitzner will follow up with Mr. Christopher regarding scheduling the workshop.

Ms. Carvalho recommended that both parties be prepared to find resolution at that meeting.

Mr. Huebner recommended reaching out to management companies and recruiting consultants. Mr. Selepe noted that the agreement with SPC includes recruiting.

Ms. Powers noted that UPCA may not be able to attend the June 30th meeting. However, the Board will still have a meeting regardless for agenda items and discussion.

There was brief discussion regarding attendance of the UPCA Board at the workshop.

Consideration of Resolution 2026-16, Related to Committee Seats & Terms

Ms. Powers gave an overview of the resolution and noted it allows the Board to assign Seat numbers for the Finance and Strategic Planning Committees with terms. This has yet to be determined, but the first year term is approaching on July 31st. Once assigned, the Committee members can decide what member sits in what Seat.

There was brief discussion regarding the timing of the seats within the committees. It was noted that Mr. Freedman previously requested a one-year term.

Ms. Carvalho recommended approving the resolution today and confirming the timing of the seats at the next meeting.

Mr. Huebner recommended including the Governance Committee in the resolution. Ms. Carvalho noted that the Charter has not been created yet and the resolution language can be included upon creation.

ON MOTION by Mr. Huebner, second by Mr. Hetizner, with all in favor, the Board of Supervisors for the University Park Recreation District approved Resolution 2026-16, Related to Committee Seats and Terms.

Assignment of Committee Members to Committee Seats

Mr. Swanson will follow up with the Finance Committee and Mr. Selep will follow up with the Strategic Planning Committee regarding the seat terms. Mr. Selep noted the Strategic Planning Committee requested that the Board make the decision.

Nominations/Appointment of Finance Committee Member

Ms. Carvalho noted there is an open Seat on the Finance Committee. It was noted there are five interested candidates.

The Board voted for the Finance Committee member. Mr. Selep voted via email.

It was noted that Mr. Crouch provided feedback with his recommendations to Mr. Selep and Mr. Swanson. Ms. Carvalho noted the Charter states that it is a Board decision.

Ms. Carvalho noted that Mr. Baran received the most votes. District Management will follow up.

Review and Consideration of District Treasurer Responsibilities

Mr. Swanson provided an overview and noted he has reviewed the responsibilities with Mr. Crouch. It was noted that the Treasurer has fiduciary responsibility and is a signatory on District financial items.

ON MOTION by Mr. Selep, second by Mr. Heitzner, with all in favor, the Board of Supervisors for the University Park Recreation District approved the District Treasurer Responsibilities.

Discussion of Responses to Public Comments/Questions

Mr. Swanson gave an overview and noted the Board has limited time when meeting.

There was discussion on the response process to public questions that are not addressed during a meeting. It was noted public comments are not intended to be a conversation.

Ms. Carvalho noted that Mr. Selep provides a summary of each meeting in the Club Weekly. She recommended having a section in the Club Weekly for questions with answers that were not previously addressed.

Ms. Carvalho noted that the Board can collaborate on answers to the questions.

Mr. Selep will draft the initial response to any questions.

Discussion of Board Meeting Executive Summary – Scott Huebner

Mr. Huebner gave an overview and noted this was completed with the help of a resident. This would give a recap of each meeting for residents, including any Committees.

Ms. Carvalho noted a resident cannot be the one producing the summary. This would not replace meeting minutes but would provide quicker access to a meeting summary.

Mr. Huebner recommended having the resident provide a presentation. This summary would be available to anyone.

Mr. Selep noted that Zoom has the capability of providing a transcript. It was noted that all transcripts have to be reviewed for accuracy.

Mr. Huebner will follow up.

FIFTH ORDER OF BUSINESS

District Financial Matters

Ratification of Payment Authorization Nos. 162 & 163

Mr. Fetsick gave an overview and noted there are some details missing.

This item was deferred.

Supervisor Requests & Future Agenda Items

It was noted all items will be deferred to the next meeting until otherwise determined.

The upcoming workshops and meetings were noted.

Date	Meeting Type	Time	Location
June 30, 2026	Board of Supervisors' Meeting	2:00PM	University Park Business Offices
July 8, 2026	Strategic Planning Committee Meeting	3:00 PM	University Park Business Offices
July 15, 2026	Finance Committee Meeting	3:00 PM	University Park Business Offices
July 17, 2026	Board of Supervisors' Rescheduled Meeting	2:00 PM	University Park Business Offices
July 28, 2026	Board of Supervisors' Special Meeting	2:00 PM	University Park Business Offices

There were no Supervisor requests at this time.

Any public comments or questions can be sent to District Management.

SIXTH ORDER OF BUSINESS

Adjournment

There was no further business to discuss.

ON MOTION by Mr. Selep, second by Mr. Huebner, with all in favor, the June 23, 2026, Board of Supervisors Meeting for the University Park Recreation District was adjourned at 4:01 p.m.

Secretary / Assistant Secretary

Chairperson / Vice Chairperson

MINUTES OF MEETING

UNIVERSITY PARK RECREATION DISTRICT BOARD OF SUPERVISORS' MEETING

Tuesday, June 30, 2026

2:00 p.m.

Business Offices

8301 The Park Boulevard, University Park, FL 34201

Board Members present in person or via phone:

Steve Heitzner	Chairperson
Scott Huebner	2 nd Vice Chairperson
Gregory Selep	Board Secretary

Also, Present in person or via phone:

Vivian Carvalho	District Manager – PFM Management Services LLC
Kwame Jackson	ADM - PFM Management Services LLC (via Zoom)
Curtis Nickerson	Director of Properties & Facilities - Country Club
Marisa Powers	District Counsel – Blalock Walters (via Zoom)
Various Audience Members in-person and via Zoom	

FIRST ORDER OF BUSINESS

Organizational Matters

Call to Order, Roll Call, and Pledge of Allegiance

The meeting was called to order at 2:01 p.m. by Ms. Carvalho. Those in attendance are outlined above.

The Pledge of Allegiance was recited.

Public Comments

Mr. Ludmerer commented regarding the turmoil within the community and noted there is now opportunity to work together. He recommended hiring an external facilitator or consultant to help with that process. He also noted that recruiting a new General Manager will be difficult during this time. He recommended working with a recruiting firm. Lastly, he noted that although he supports the Capital Improvement Plan, he does not support having multiple assessments within the same fiscal year.

Mr. Freedman commented regarding the humanity and compassion Mr. Fetsick has shown and questioned why he submitted his resignation. He noted there is division within the community and UPCA and the UPRD need to come together, without having lawyers involved.

Mr. Pearson noted that the UPRD and UPCA Boards are elected by the residents and the residents expect collaboration.

Mr. Agles noted that he had sent an email with recommendations. Ms. Carvalho noted that it was received and responded to. This email will be part of the District's Correspondence List Summary. Mr. Agles read his email into the record.

Mr. Charlesworth noted he has lived in University Park for 25 years. He commented regarding the Mutual Cooperation Agreement and noted there is conflict resolution within the document. He also commented regarding the interruption to Mr. Heitzner's presentation at the previous Board meeting by a UPCA Board member. It was noted there needs to be a balance within the Boards.

Ms. Dickson commented regarding the Management Agreement. She recommended reviewing the Ethics Commission's opinion regarding the Management Agreement and to look into clarifying the structure. It was noted there are questionable areas within the agreement that may not properly communicate their intent.

There were no further public comments at this time.

SECOND ORDER OF BUSINESS

Business Matters

Continued Discussion of the Updated PBM Operating Agreement Approved by UPCA on May 15, 2026

Mr. Heitzner thanked everyone for their comments and concern. He noted it is a very diverse community with varying opinions. The Board will do what they feel is in the best interest of the community. It was noted the Board had decided to not move forward with a meeting with the UPCA at this time. The two Chairs and both attorney representatives will schedule a meeting prior to the two Boards meeting together. This meeting will take place on July 15th, with the UPCA and UPRD Board meeting taking place on July 17th. It was noted changes could take place prior to that happening.

Mr. Heitzner spoke regarding Mr. Fetsick's resignation and noted that he has met with the Club staff and Leadership Team. He noted the Club will continue running as it is, even without a General Manager. It was noted that the issues with UPCA do not affect how the Club runs. Mr. Nickerson will be taking over in the interim.

Mr. Heitzner has been tasked to lead a Search Team to find a new GM. It was recommended to hire a bench General Manager as a temporary assignment if needed. The Search Team includes Mr. Heitzner, Mr. Christopher, Mr. Horton, and Mr. Caliendo. That team is meeting with a

prospective temporary GM this Sunday.

Mr. Heitzner noted the Board needs to decide what it needs to take on. He gave an overview of tentative options for the Board. These included:

1. Going through the search while still having discussion with the UPCA Board related to the Mutual Cooperation Agreement
2. Cancelling the PBM Agreement with a 90-day notice and hiring a new GM that reports to the Board
3. Cancel the PBM Agreement and UPCA Agreement, hire a new GM with a new management company

Mr. Heitzner gave a few examples of what other Districts have done and what the process would look like for UPRD.

It was also noted the HR Leader is leaving on July 10th. The current HR Leader has found someone to come in on a temporary basis.

Mr. Heitzner requested everyone's patience.

It was noted that under the current agreement, the temporary GM will be working for PBM Management. However, they would report to the UPRD Board. Mr. Huebner noted the temporary GM would be an independent contractor and they could help give feedback. He recommended exploring all options.

There was lengthy discussion regarding the options of hiring a new General Manager.

Mr. Heitzner reviewed the decision timeline and noted he will continue doing due diligence related to fact finding. The meeting with Mr. Christopher and the attorneys will take place followed by the UPRD and UPCA Board meeting. After that, the UPRD Board can decide how to proceed.

Update of Boardwalk Project – John Fetsick

Mr. Nickerson noted that two proposals have been received and these will be forwarded to the Board. The costs of the proposals are \$580,000.00 and \$490,000.00. It was noted the proposals did not include shade structures or details, only the base designs.

There was discussion regarding breaking down the project into phases, the cost, and the scope of work.

Ms. Carvalho noted that once the proposals are received, she will forward to Mr. Crouch.

Update of Proposed Governance Advisory Committee

Ms. Powers noted that Mr. Barnebey revised the Governance Advisory Committee draft.

There was brief discussion regarding the Governance Advisory Committee compared to the other Committees.

Ms. Carvalho noted the Charter, and final Resolution would be brought back at the July 17th Board meeting.

Mr. Huebner recommended changes to the draft regarding removal of Committee members with or without cause. He requested to add “a super majority” vote to that decision. It was noted that the Charter can be amended at any time.

Ms. Powers will make the appropriate changes, and it will be brought back to the Board for final approval.

Consideration of Proposal(s) for Fitness Center Refurbishment

Mr. Nickerson requested additional directions for the scope of work. He will follow up with proposal breakdowns.

Mr. Heitzner requested rubber flooring for the Fitness Center.

It was noted proposals will include paint, new floor, taking out the bar, and taking down a few walls. Mr. Nickerson noted that if the quote was over \$35,000.00, it would have to go out for bids.

Mr. Selep noted it would need to be a phased project.

Mr. Nickerson also noted that roof repairs will need to be included.

This item was deferred.

Update of Focused Technology Proposal for Lakeside Room Audio/Visual Equipment Replacement

Mr. Selep gave an update on the possibility of the UPCA sharing the cost. He noted that the UPCA is not interested in taking on additional cost. They will only agree to 1/3 of the cost.

There was brief discussion regarding the cost and need for the replacement.

This item was deferred until further notice.

Continued Discussion Pertaining to District Counsel Representation

This item will be deferred until further notice.

Assignment of Committee Members to Committee Seats

Ms. Carvalho noted this language will also be included in the Governance Advisory Committee Charter.

Mr. Selep noted that Mr. Freedman is the only one of the Strategic Planning Committee who has requested a one-year term.

Mr. Crouch noted that the one-year term would apply to Ms. Schaffer's Seat, now held by Mr. Baran.

There was lengthy discussion regarding the assignment of Seats. It was noted the Board is not required to appoint or required to open the Seats.

Ms. Powers noted that all Seats must be assigned a term and it will be retroactive.

On the Strategic Planning Committee, Mr. Freedman's Seat will serve a one-year term, with all others serving a two-year term.

Mr. Jackson noted that there are three two-year terms and two one-year terms within the Committees.

Ms. Powers noted that Seat 2 and Seat 4 are one-year terms.

Mr. Freedman was assigned to Seat 2.

Mr. Selep recommended assigning the other Seats alphabetically.

There was brief discussion regarding the timeline of the Seats.

ON MOTION by Mr. Selep, second by Mr. Heitzner, with all in favor, the Board of Supervisors for the University Park Recreation District approved the Assignment of Committee Members to Committee Seats, with assignment being alphabetically based and one-year Terms as requested.

Discussion of Board Meeting Executive Summary – Scott Huebner

Ms. Carvalho gave an overview. It was noted that updated documents have been given to the Board for review.

There was a discussion regarding the process of meeting minutes. It was noted the minutes usually take about two weeks to be finalized. The minutes do not go on the District's website until approved by the Board.

Mr. Selep noted this would provide access to a meeting summary faster than waiting on the meeting minutes. However, the summary provided was 18 pages long. He questioned who would produce the summary and how it would be posted to the community.

There was discussion regarding the summary and communication with residents. Mr. Selep noted the summary could be attached as a file to the already provided meeting bullet points.

Ms. Carvalho noted that a resident cannot take on the task. A Board member and District Staff would have to review it prior to sending it out, as AI is not 100% correct.

Mr. Selep noted Zoom also has a transcript function.

There was continued discussion regarding the summary and communication.

Mr. Selep will reach out to the resident for more information.

This item was deferred.

THIRD ORDER OF BUSINESS

District Financial Matters

Ratification of Payment Authorization No. 162 & 163

The Board reviewed the payment authorizations.

ON MOTION by Mr. Selep, second by Mr. Heitzner, with all in favor, the Board of Supervisors for the University Park Recreation District ratified Payment Authorization No. 162 and 163.

Supervisor Requests & Future Agenda Items

The upcoming workshops and meetings were noted.

Date	Meeting Type	Time	Location
July 8, 2026	Strategic Planning Committee Meeting	3:00 PM	University Park Business Offices

July 15, 2026	Finance Committee Meeting	3:00 PM	University Park Business Offices
July 17, 2026	Board of Supervisors' Rescheduled Meeting	2:00 PM	University Park Business Offices
July 28, 2026	Board of Supervisors' Special Meeting	2:00 PM	University Park Business Offices

It was noted the July 17th meeting will be the joint meeting with both UPRD and UPCA and will also include ordering the methodology if decided by the Board.

It was noted Mr. Selep will be able to attend the July 17th meeting.

Mr. Selep noted the Strategic Planning Committee will have to replace Mr. Freedman. The recommendation was to have Ms. Johnson send a community-wide communication for interested persons to fill that Seat. Mr. Selep will follow up.

Mr. Heitzner noted the Focus Group findings were distributed as of today.

There were no further Supervisor requests at this time.

FOURTH ORDER OF BUSINESS

Adjournment

There was no further business to discuss.

ON MOTION by Mr. Selep, second by Mr. Huebner, with all in favor, the June 30, 2026, Board of Supervisors Meeting for the University Park Recreation District was adjourned at 3:47 p.m.

Secretary / Assistant Secretary

Chairperson / Vice Chairperson



University Park Recreation District

Public Records Request Summary List

Total of All Records Request

Tally of Records	ID# Assignment	Date Updated	Name of File / Subject	Status	Files Released
1	Additional Documents	9.6.24	Additional Documents	Completed	33
1	Insurance	9.26.24	Insurance	Completed	8
1	Additional Records	10.25.24	Additional Records	Completed	3
1	Additional Document	11.7.24	Additional Document	Completed	1
1	Additional Document	11.11.24	Additional Document	Completed	5
1	Additional Document	12.12.24	Additional Document	Completed	2
1	10.1.24 & 12.19.24 Additional Document	12.19.24	10.1.24 & 12.19.24 Additional Document	Completed	6
1	Election	2.6.25	Election	Completed	34
1	4th Election Voter List	2.20.26	4th Election Voter List	Completed	2
1	4th Election Invalid Ballots 3.14.25	3.14.25	4th Election Invalid Ballots 3.14.25	Completed	1
1	Official Tally Sheet 3.14.25	3.14.25	Official Tally Sheet 3.14.25	Completed	1
1	3.31.25	3.31.25	3.31.25	Completed	1
1	2025 Election	4.5.25	2025 Election	Completed	19
1	Ballot Results	4.7.25	Ballot Results	Completed	1
1	4.14.25	4.14.25	4.14.25	Completed	5
1	Business Plan Group Executive	4.14.25	Business Plan Group Executive	Completed	1
1	5 Year Plan	5.6.25	5 Year Plan	Completed	17
1	Organizational Charts	7.15.25	Organizational Charts	Completed	2
1	Finance & Strategic Planning	7.28.25	Finance & Strategic Planning	Completed	9
1	Committee Expertise Summary	7.29.25	Committee Expertise Summary	Completed	2
1	July Board Meetings Attendance	8.1.25	July Board Meetings Attendance	Completed	4
1	8.7.25 District Financial Reports	8.7.25	8.7.25 District Financial Reports	Completed	5
1	MD&A Request	8.8.25	MD&A Request	Completed	3
1	District Financials	8.12.25	District Financials	Completed	2
1	Irrigation System Evaluation	9.17.25	Irrigation System Evaluatiion	Completed	1
1	MB 9.18.25	9.18.25	MB 9.18.25	Completed	1
1	Records Request #1 Fact Focus	10.27.25	Records Request #1 Fact Focus	Completed	3
1	Records Request #2 Finance Legal Issues	10.27.25	Records Request #2 Finance Legal Issues	Completed	16
1	Records Request #4 BOS Workshop Cance	10.27.25	Records Request #4 BOS Workshop Cancellation	Completed	20
1	Records Request #3 Stock Touting SEC	10.28.25	Records Request #3 Stock Touting SEC	Completed	5
1	Records Request #9 Proposals	10.28.25	Records Request #9 Proposals	Completed	2
1	Records Request #9 Proposals	10.28.25	Records Request #9 Proposals	Completed	2
1	Records Request #7 Finance Cancellation	10.28.25	Records Request #7 Finance Cancellation	Completed	10
1	Records Request #8 Invoice Redaction	10.28.25	Records Request #8 Invoice Redaction	Completed	2
1	Records Request #6 9.22.25	10.29.25	Records Request #6 9.22.25	Completed	3
1	ID#3	11.3.25	ID#3 Public Records Request	Completed	1
1	ID#1	11.6.25	ID#1 10.29.25	Completed	3
1	ID#8	11.6.25	ID#8 7.8.24	Completed	5
1	ID#5	11.6.25	ID#5 7.8.24	Completed	4
1	Records Request 11.16.23	11.6.25	Records Request 11.16.23	Completed	2
1	Records Request 2.23.24	11.6.25	Records Request 2.23.24	Completed	2
1	Records Request 3.22.24	11.6.25	Records Request 3.22.24	Completed	5
1	Records Request 5.11.24	11.6.25	Records Request 5.11.24	Completed	3
1	Records Request 5.29.24	11.6.25	Records Request 5.29.24	Completed	4
1	Records Request 1.22.25	11.6.25	Records Request 1.22.25	Completed	2

1	Records Request 3.14.25	11.6.25	Records Request 3.14.25	Completed	2
1	Records Request #5 Varsity Club	11.10.25	Records Request #5 Varsity Club	Completed	8
1	ID#3	11.18.25	ID#3 11.18.25	Completed	1
1	ID#2	11.18.25	Records Request ID#2 10.29.25	Completed	16
1	ID#5	11.18.25	Records Request ID#5 11.16.25	Completed	2
1	ID#10	12.15.25	E-mails from Mark Invoice	Completed	8
1	ID#9	12.17.25	ID#9 11.24.25	Completed	1
1	ID#13	1.8.26	12.29.25 Election Procedure & General Inforamtion Package	Completed	2
1	ID#15	1.8.26	Dec. Start Mtg Recording, Strategic Planning Committee	Completed	4
1	ID#17	1.21.26	Zoom Information	Completed	2
1	ID#6	2.19.26	11.19.25 Maintenance 5-Year Ago	Completed	28
1	ID#1	2.19.26	ID# 1 7.8.24	Completed	5
1	ID#6	2.19.26	ID#6 7.8.24	Completed	19
1	ID#7	2.19.26	ID#7 7.10.24	Completed	23
1	ID#18	3.12.26	AI Invoice from District Counsel	Completed	2
1	ID#11	3.12.26 / 5.22.26	Invoices from Mark B Year 2024	Completed	33
1	ID#12	3.16.26 / 5.22.26	ID #2 10.29.25 (2nd Request)	Completed	72
1	ID#22	4.21.26	Draft of the Opinion Letter from the Comission on Ethics	Completed	5
1	ID#19	5.7.26	Funds Transaction Points A, B, C	Completed	43
1	ID#21	5.7.26	Lewis Longman Walker	Completed	4
1	ID#20	5.21.26	Lewis Longman Walker	Completed	40
1	ID#23	5.21.26	Invoices for Security Equipment 1/1/2020	Completed	10
1	ID#24	5.21.26 / 5.22.26	Emails about Open Seat Position	Completed	14

68	Total of Records Request	08.04.26
607	Total of Files Released	08.04.26



University Park Recreation District

Discussion of Appointment of Board Member Seat 3 Vacancy



University Park Recreation District

Nominations / Appointment of Governance Committee Members



University Park Recreation District

Consideration of Proposals for General Manager Search

- a. Overview of General Manager Role**
- b. Kopplin Kuebler & Wallace**
- c. Strategic Club Solutions**

University Park Country Club – General Manager Role Overview

About University Park Country Club

University Park Country Club is a premier semi-private, member-focused country club located just outside Sarasota, Florida, within the University Park residential community.

The Club serves approximately **1,400 members** and a residential community of approximately **1200 homes**, with annual operating revenue of approximately **\$14 million**. Its amenities include 27 holes of championship golf, racquets facilities, fitness and wellness offerings, dining, social programming, and private events.

University Park Country Club is entering an important period of growth and transformation. The organization is advancing long-range strategic planning and significant capital improvement initiatives intended to enhance its facilities, operations, member experience, and long-term financial sustainability.

Position Summary

The General Manager provides executive leadership for the Club's day-to-day operations, financial performance, member experience, workforce, and long-range operational planning.

The GM will lead a complex, multi-amenity operation while balancing the expectations of members, residents, employees, governing bodies, and other community stakeholders. This position requires a highly capable club executive who combines strong operational and financial expertise with sound judgment, diplomacy, transparency, and exceptional communication skills.

Principal Responsibilities

- Provide executive leadership for all Club operations, including golf, racquets, wellness, food and beverage, events, membership, facilities, finance, human resources, and communications.
- Lead, develop, and support a workforce of approximately 150 employees.
- Develop and administer annual operating and capital budgets while maintaining strong financial controls and accountability.
- Establish and monitor service, financial, and operational performance standards.
- Create an exceptional member and guest experience across all Club amenities.

- Advise governing leadership regarding operational priorities, capital requirements, organizational risks, and long-range planning.
- Support the planning and execution of major capital improvement projects.
- Build productive relationships with members, residents, employees, committees, professional advisers, vendors, and community stakeholders.
- Promote a collaborative workplace culture focused on service, accountability, communication, and professional development.
- Ensure compliance with applicable agreements, policies, employment requirements, and public-sector procedures.

Governance Environment

University Park Country Club operates within the University Park Recreation District, an independent special district and public governmental entity responsible for the club's recreational facilities and related assets. The Recreation District functions in concert with a separate homeowners association, the University Park Community Association, Inc.

Unlike a traditional private club, the organization operates within both a public governmental framework and a community-association environment. The General Manager must work effectively with multiple entities whose responsibilities, interests, and authority may intersect. Success requires a leader who understands the distinction between governance and operations, establishes clear lines of communication, provides consistent and accurate information, and navigates differing priorities while maintaining operational accountability.

Ideal Leadership Profile

The successful candidate should bring:

- Significant executive leadership experience in a private club, country club, resort, hospitality, or comparable multi-amenity environment.
- Strong financial management, budgeting, operations, and capital-planning experience.
- Experience leading large, multidisciplinary teams and developing a strong service-oriented culture.
- Experience working with boards, committees, homeowners associations, special districts, or other multi-stakeholder organizations.

- The judgment and diplomacy necessary to operate effectively within a complex governance environment.
- Exceptional written, verbal, and interpersonal communication skills.
- A demonstrated ability to strengthen operations, improve service delivery, and maintain organizational stability during periods of change.
- A collaborative leadership style combined with the confidence to establish clear expectations, boundaries, and accountability.

UNIVERSITY PARK COUNTRY CLUB

GENERAL MANAGER/CHIEF OPERATING OFFICER



KOPPLIN KUEBLER & WALLACE

THE MOST TRUSTED NAME IN EXECUTIVE SEARCH AND CONSULTING

July 20, 2026

Mr. Steve Heitzner
Chairman, Board of Supervisors
University Park Country Club
7671 The Park Boulevard
University Park, FL 34201

Dear Mr. Heitzner:

Thank you for contacting our firm and allowing us the opportunity to assist with your search for a General Manager/Chief Operating Officer at University Park Country Club. We are pleased to offer our expertise in executive search and understand the critical importance of achieving a successful outcome tailored to your club's specific needs.

Established in 1996, we are dedicated to our deep roots while continuously evolving to drive innovation and growth. This ensures that your club and the candidates we present receive an unparalleled experience. Some may suggest that firms smaller than ours offer a more personalized approach. We believe that sometimes, smaller is simply less: less expertise, less support, and less ability to deliver at the highest level. With KOPPLIN KUEBLER & WALLACE, you will get the best of both worlds: **industry-leading strength and boutique-level experience.**

The attached materials outline our search process and the additional services we provide. Based on our discussions regarding your club's specific needs, our professional executive search and placement services are available at a fee of \$42,500.00, plus reasonable travel expenses. The accompanying Engagement Agreement fully outlines these details.

Please feel free to contact me with any questions. I can be reached at 216.509.2250 or via email at sam@kkandw.com.

We are confident in our ability to help you find and secure the right candidate for this important role. The dedicated team at KOPPLIN KUEBLER & WALLACE looks forward to supporting you throughout this process.

Thank you once more for considering our services. We eagerly await your response and the opportunity to work together.

Sincerely,



Sam Lindsley
Search Executive
KOPPLIN KUEBLER & WALLACE, LLC

7349 VIA PASEO DEL SUR, #202 SCOTTSDALE, AZ 85258 | (833) KKW-HIRE | WWW.KKANDW.COM | [@KKW_UPDATE](https://twitter.com/KKW_UPDATE)

ARIZONA | COLORADO | FLORIDA | GEORGIA | KANSAS | MICHIGAN | NEBRASKA | NEW JERSEY | NEW YORK
NORTH CAROLINA | OHIO | TEXAS | WASHINGTON D.C. | AUSTRALIA | CANADA | NEW ZEALAND | UNITED KINGDOM



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PEOPLE FOCUSED, QUALITY DRIVEN

250+
club visits per year



1000+
successful placements

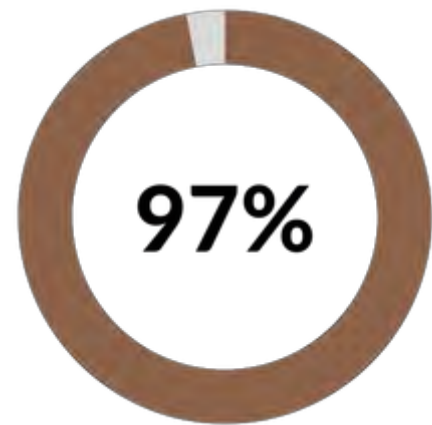
Working with us, you can expect an experience that will be centered around the well-being of our clients, the candidates we place, and the industry as a whole. Our process has been perfected since 1996 and involves merging more than 500 years of combined expertise with a comprehensive understanding of stakeholders' needs.

We are an award-winning executive search and consulting firm and a trusted partner dedicated to the success of the organizations we work with.

Core Values: Integrity, Education, Respect, Relevant, Quality, and Fun

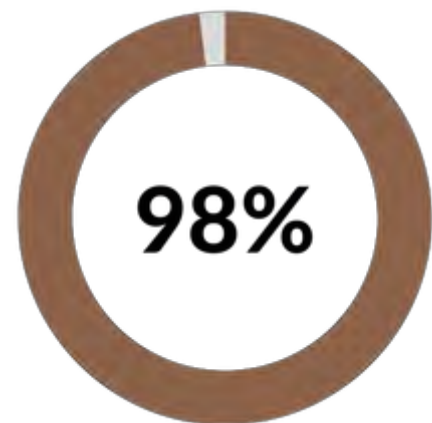


SATISFACTION RATING



Clients

When asking clients how likely they are to recommend working with KK&W to a friend or colleague, our average response is a 6.8/7.



Candidates

When asking candidates how likely they are to recommend working with KK&W to a friend or colleague, our average response is a 6.9/7.



ACKNOWLEDGEMENTS

Best Search Firm Of The Year Every Year Since 2006

*5 Combined Team Members Actively Instructing Within
CMAE’s Management Development Programme & CMAA’s Business Management Institute*



2007	2011	2014	2019	2020	2021	2022	2023	2025	2026
Tom Wallace Excellence in Club Management® Award	Richard Kopplin Lifetime Achievement Award in 2011 & 2018 Kurt Kuebler Gary Player Educator of the Year	Mid-Management Search Firm of the Year Richard Kopplin Gary Player Educator of the Year	Richard Kopplin Inducted into the AZ Golf Hall of Fame Ted Gillary Inducted as a CMAA Fellow & Excellence in Club Management® Award Michael Smith Excellence in Club Management® Award	Tom Wallace Gary Player Educator of the Year Lawrence McFadden Excellence in Club Management® Award	Richard Kopplin Inducted as a CMAA Fellow	Kurt Kuebler Inducted as a CMAA Fellow Richard Kopplin Distinguished Clubs Lifetime Achievement Award	International Expansion - London Office	International Expansion - Australia & New Zealand Office Marcie Mills Gary Player Educator of the Year	Celebrating 30 Years in Business

WHAT WE DO



EXECUTIVE SEARCH

Specializing in GM/COO, CEO, AGM, Clubhouse Management, F&B, Financial, Golf, Culinary, Agronomy, Racquets, HR, Fitness & Wellness, Membership, Marketing, Recreation & Activities Director searches.



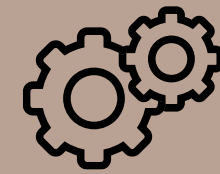
EDUCATION & TRAINING

We design programs to equip club leaders with knowledge and tools to successfully navigate their jobs. Our interactive sessions involve storytelling, sharing experiences, role playing & situational awareness.



CONSULTING & PLANNING

Our team, has an unparalleled, more than 500 combined years of country, golf and community club management experience. We are your partners and trusted advisors dedicated to ensuring your success.



GOVERNANCE RETREATS

Our Board Dynamics/Model has been presented to over 1000 private clubs and communities. Our best practices are respected and regularly highlighted by the leading industry publications and associations.

FIRM PARTNERS



RICHARD M. KOPPLIN, CMAA FELLOW

Dick founded KK&W in 1996 following a 35-year career as a private club general manager and vice president for nationally recognized clubs. His vision is to provide private clubs with an exemplary level of service in matching executive level candidates with clubs and their culture...[\[Contact & Bio\]](#)



KURT D. KUEBLER, CCM, CMAA FELLOW

Kurt joined the firm in 2007, after a highly successful career managing private clubs and private club communities for more than 28 years. His comprehensive leadership background brings unique insights to all aspects of the industry and its evolving state...[\[Contact & Bio\]](#)

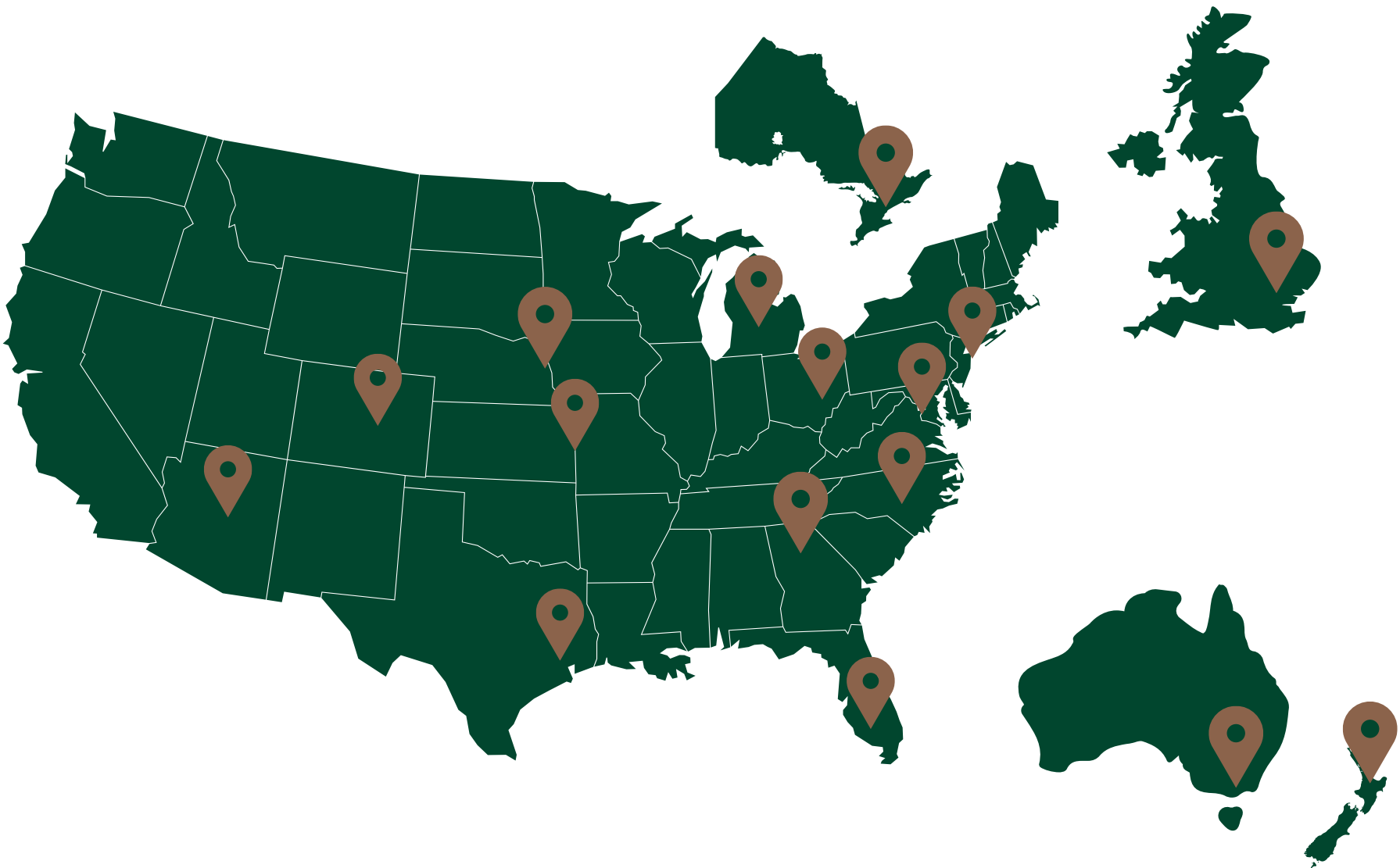


THOMAS B. WALLACE III, CCM, CCE, ECM

Prior to joining the firm in 2014, Tom served in club management at some of the country’s most distinguished private clubs. His transformational leadership style has resulted in loyal and high-performing teams of associates and many invitations to speak on club culture...[\[Contact & Bio\]](#)

OFFICE LOCATIONS

UNITED STATES | AUSTRALASIA | CANADA | UNITED KINGDOM



SEARCH & CONSULTING EXECUTIVES



BRAD BAECHT, LCAM, CMCA, AMS, PCAM
Community Association
GM/COO Placement Specialist
[\[Brad Baecht\]](#)



JODIE CUNNINGHAM, SPHR, SHRM-SCP
Talent and People Leadership Strategist
Human Resources Placement Specialist
[\[Contact & Bio\]](#)



CHRIS DECHILLO
Hospitality Trainer and Leadership Coach
F&B Trainer and Strategist
[\[Contact & Bio\]](#)



J.G. TED GILLARY, CCM, CCE, ECM
CMAA FELLOW
Leadership Coach
GM/COO and AGM Placement Specialist
[\[Contact & Bio\]](#)



MICHAEL HERD
Head of International Search & Consulting
GM/COO and Golf Placement Specialist
[\[Contact & Bio\]](#)



PAUL LEVY, PGA
Golf Operations & Tournament Strategist
GM/COO, Golf, and AGM Placement Specialist
[\[Contact & Bio\]](#)



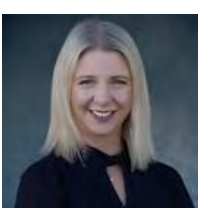
SAMUEL LINDSLEY
GM/COO, AGM, and F&B Placement Specialist
[\[Contact & Bio\]](#)



BEN LORENZEN, CCM
Marketing/Communications, Activities Director
and Director of Recreation Placement Specialist
[\[Contact & Bio\]](#)



LAWRENCE MCFADDEN, CMC, ECM
Culinary Trainer and Strategist
Culinary and F&B Placement Specialist
[\[Contact & Bio\]](#)



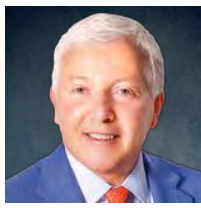
EMILY MCCARVILL
International Placement Specialist - Australasia
[\[Contact & Bio\]](#)



MARCIE MILLS, CCM
GM/COO, AGM, and F&B Placement Specialist
[\[Contact & Bio\]](#)



TIM NELSON
International Placement Specialist - Australasia
[\[Contact & Bio\]](#)



ZACHARY PLATEK, CCM, CCE
Interim Management Director
[\[Contact & Bio\]](#)



MICHELLE RIKLAN
ACRW, CPRW, CEIC, CJSS
Career Marketing Strategist
Finance Placement Specialist
[\[Contact & Bio\]](#)



LEN SIMARD, USTA, PTR, PPR & RSPA
MASTER PROFESSIONAL
Racquets Program & Facility Strategist
GM/COO, AGM, Racquets, and Wellness
Placement Specialist [\[Contact & Bio\]](#)



MICHAEL SMITH, CCM, CCE, ECM
GM/COO, AGM, and F&B Placement Specialist
[\[Contact & Bio\]](#)



ARMEN SUNY
Agronomy Operations Strategist
GM/COO, Agronomy and AGM Placement Specialist
[\[Contact & Bio\]](#)



KEVIN VITALE, CCM
Search Executive/Principal of PCGA
[\[Contact & Bio\]](#)



ANNETTE WHITTLEY, CCM
F&B Trainer and Strategist
Culinary and F&B Placement Specialist
[\[Contact & Bio\]](#)

YOUR VALUE

Executive search is not just our business...It is our passion and we deliver what we promise.

☑ FOCUS

We conduct comprehensive due-diligence with all stakeholders and will guide you in defining the needs, priorities, and culture-fit for your organization.

☑ EXPERTISE

We will develop a customized position profile for the position we are recruiting for that will be analyzed against robust candidate behavior profiling, comprehensive intakes, and backgrounding measures.

☑ REACH

We are heavily invested in sourcing candidates and recruit top talent locally, regionally, nationally and internationally. We have 7000+ subscribed email contacts, strategic partnerships with relevant professional associations and networking groups, and 40,000+ LinkedIn followers between our company, partner, and team member pages.

☑ VISIBILITY

Members of our team hold board/committee positions within industry specific associations and are regular speakers at regional, national, and international events.

Four team members lecture within CMAA's Business Management Institute (BMI), the most significant professional development program in the industry.

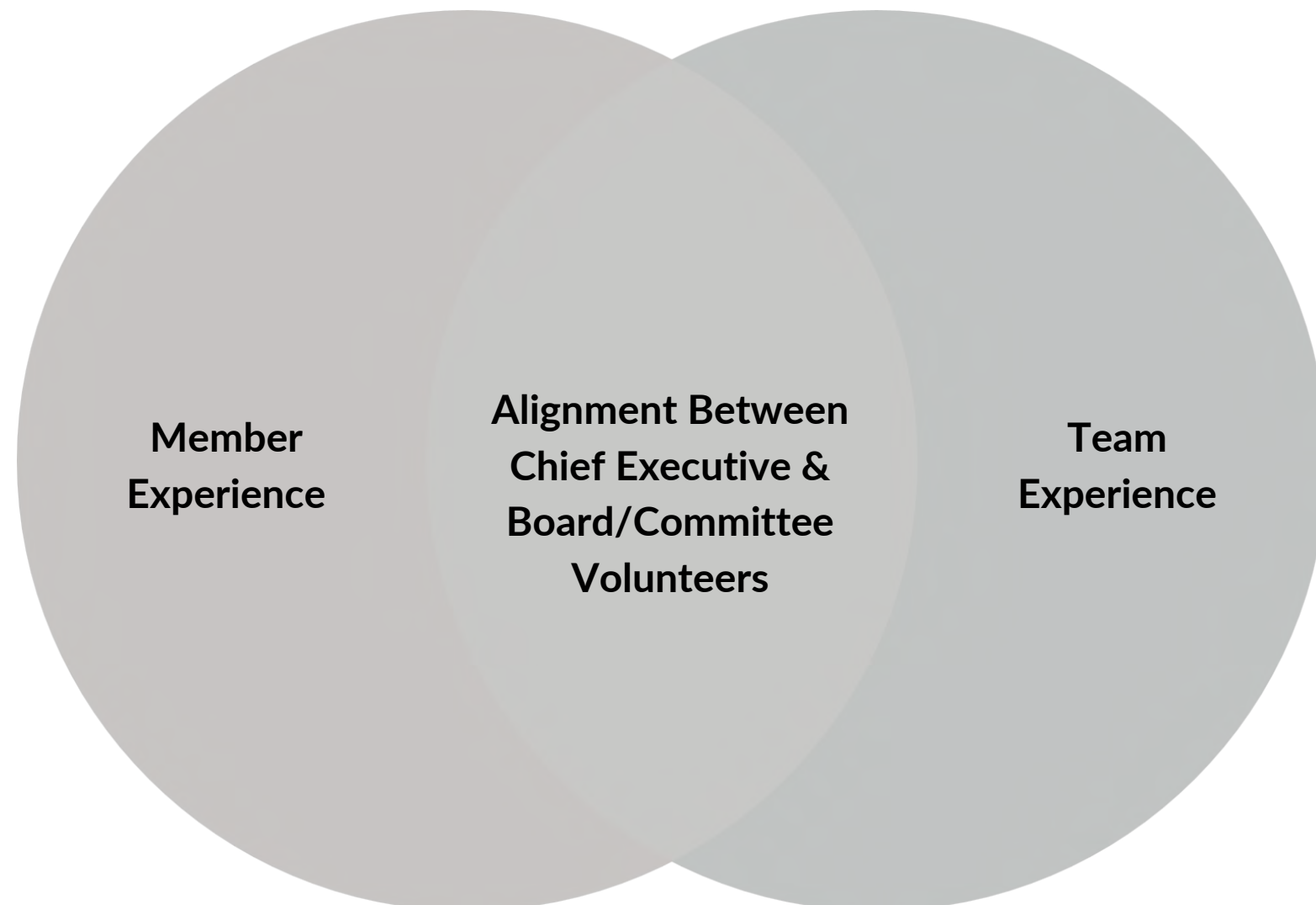
We invest time contributing expertise to several external informational resources like podcasts, webinars, and publications.

☑ RELEVANCY

Annually, we visit 250+ clubs, touring, learning, and consulting with key leaders in the trenches. Through our deeply rooted network, we obtain the information we need both “on and off the record” for every search conducted.

YOUR VALUE

The value in your investment and partnership with us goes beyond making successful placements.



☑ BOARD RETREAT

A KK&W partner will return to the club after the new chief executive begins to conduct a "Board Dynamics" seminar. Many board members have told us this program was as valuable to them as the entire search process.

☑ 3-MONTH SUBSCRIPTION TO NOTABLE

Publication designed for Directors, Officers, Owners, and Managers of Private Clubs.

☑ BOARD/COMMITTEE RESPONSIBILITIES MATRIX

One of the most important elements in board orientation and the foundation for a high-functioning board.

☑ TRANSITION COMMITTEE CHARTER & BEST PRACTICES

A blueprint for formalizing a committee and helping to ensure successful departures and introductions for chief executives.

☑ FIRST 100-DAYS CHECKLIST

A list of action items to proactively support onboarding and acclimation of a new club chief executive.

☑ YEAR ONE GM/COO GOALS

A list of key performance areas for establishing credibility, setting direction, and driving measurable improvements.

☑ 6 MONTH & ONE YEAR CHECK-INS

Post placement meetings to support successful integration and alignment between candidate performance and client expectations.

OUR PROMISE



EXPERIENCE & EXPERTISE

As a team we maintain a strong connection to the industry, both in the trenches of private clubs visiting over 250+ properties, as stewards of the industry making 200+ educational contributions, and as consultants fulfilling 150+ successful placements annually.



PROFESSIONALISM & CONFIDENTIALITY

Our candidates deserve a high level of confidentiality, something we continually remind and monitor with the Search Committee. Both candidates and clients commend us for our clear and open communications, timelines, and responsiveness.



INTERNATIONAL SEARCH CAPABILITY

Resumes are entered into our database daily, we are heavily invested in search marketing technologies, and we maintain a lively schedule of in person events. We are consistently cultivating new networks of contacts and resources ensuring a steady pipeline of talent.



COST EFFECTIVE

You can expect a laser-focused process for defining the needs, priorities, and culture-fit for the position you are hiring. We have a proven track record of placing candidates who possess integrity, competence, and compatibility with the properties we work with.

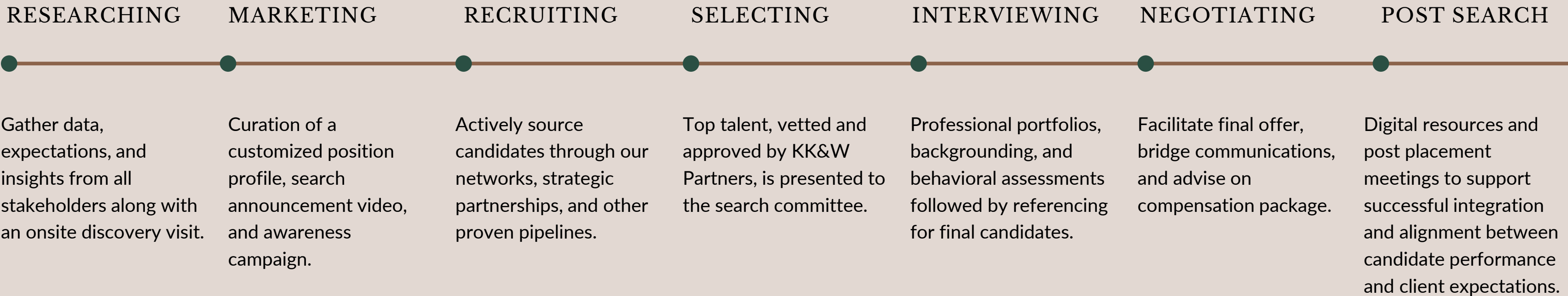
OUR GUARANTEE

We provide a two-year UNCONDITIONAL guarantee on the placement of our candidates. If a candidate is hired and should leave for any reason during that time frame, KOPPLIN KUEBLER & WALLACE will replace him/her without an additional search fee to the client.



OUR PROCESS

People Focused, Quality Driven.



SAMPLE TIMELINE

Approximately 10-12 Weeks

**Subject to adjustment based on client needs.*

Our Support & Development Team is a group of experienced professionals dedicated to the success of our Client Clubs, Candidates, Search Executives, Consultants, and Partners. As a vibrant and growing firm, we prioritize a strong infrastructure to meet the dynamic needs of our projects.



KATY ELIADES
Support & Development Specialist
[\[Contact & Bio\]](#)



NAN FISHER
Administrative Manager
[\[Contact & Bio\]](#)



ZAK KUEBLER
Support & Development Specialist
[\[Contact & Bio\]](#)



CHRISTY LATIMORE
Support & Development Specialist
[\[Contact & Bio\]](#)



PATRICIA SPRANKLE
Lead Support & Development Specialist
[\[Contact & Bio\]](#)



BETHANY TAYLOR
Support & Development Specialist
[\[Contact & Bio\]](#)



ALICE STEVENS
Support & Development Specialist
[\[Contact & Bio\]](#)



HOLLY WEISS
Support & Development Specialist
[\[Contact & Bio\]](#)

PHASE	TIMING	ACTION
Phase I: Discover & Market	Week 1-2	- Engagement Agreement - Club Culture Survey - Documents & Forms - Position Profile - Search Announcement Video - Awareness Campaign
Phase II: Recruit	Week 2-8	- Active Recruiting - Search Chair Updates - Top Candidates Vetted by KK&W Partners
Phase III: Present & Select	Week 8-9	- Present Candidates - Resumes/Cover Letters/Questionnaire - Search Exec Comments & Highlights - Narrow Down Candidates - Background Checks & Degree Verification - Behavioral Assessments
Phase IV: Initial Interviews	Week 9-10	- Electronic Interview Binder - Interview Details/Instructions/Questions - Candidate Portfolios - Behavioral Assessment Results - Onsite Interviews - Select Finalists
Phase V: Follow-Up Interviews	Week 11-12	360-Degree Reference Checks - Finalist Interviews & Meetings - Search Committee/Department Heads/Direct Reports - Employment Offer & Accepted - Membership & Staff Announcement
Phase VI: Post Search	To be confirmed	- Board Retreat - Best Practices Resources 6 month and 1 year Check-ins

EXPERIENCE & ENGAGEMENT

Dedicated to cultivating enduring relationships and partnerships, beyond executive search, across the private club and hospitality community.

- Opportunities for continued connection and collaboration
- Ongoing thought leadership and development initiatives
- Awareness, knowledge sharing, and stewardship
- Post-assignment client and candidate continuity



HANNAH EANES, PCM, CDMP

Brand & Operations Lead

[\[Contact & Bio\]](#)



ROXANNE FILBY

Engagement & Relations Specialist

[\[Contact & Bio\]](#)



JACLYN MCCURDY

Marketing & Graphic Design Specialist

[\[Contact & Bio\]](#)



COMMUNICATIONS

Our team can assist by offering templates for stakeholder communications throughout the executive search process...

At the beginning of the search, we can help communicate to the membership that KOPPLIN KUEBLER & WALLACE has been retained, along with a general overview of the executive search process.

During the search, we can support updates to stakeholders regarding the progress of the executive search.

After the candidate employment agreement is signed, we can work with the client to design an announcement of the new hire for the membership and prepare a press release.



BACKGROUNDING, REFERENCING, & BEHAVIORAL ASSESSMENTS

Conducted by professional investigators in addition to the industry reference work done by the KK&W Team.

☑ BACKGROUND CHECKS

- Federal/State/County Criminal History
- County Civil History
- Driving Record
- Registered Sex Offender Check
- Degree/Certification Verification
- Open Source Social Media Search

☑ 360 DEGREE REFERENCE CHECKS

- Interview supervisors
- Interview subordinates
- Interview colleagues

☑ BEHAVIORAL ASSESSMENTS

- Each candidate chosen to interview completes a behavioral assessment as another overall contributing factor to the ultimate hire:
 - ProfileXT Summary Report
 - IQ, Behavioral and Occupational Alignment outcomes are identified
 - KK&W has established significant industry and role benchmarks for comparison



PLOTKINGGROUP

CLIENT HISTORY SNAPSHOT

MASTER LIST PROVIDED UPON REQUEST

Admirals Cove Jupiter, FL	Club Pelican Bay Naples, FL	Grosse Pointe Yacht Club Grosse Pointe Shores, MI	Old Westbury Golf & Country Club Old Westbury, NY	The Country Club of Virginia Richmond, VA
Addison Reserve Country Club Delray Beach, FL	Colleton River Club Bluffton, SC	Haig Point Daufuskie Island, SC	Paradise Valley Country Club Paradise Valley, AZ	The Ford Field & River Club Richmond Hill, GA
American Club Hong Kong Hong Kong, China	Collier's Reserve Country Club Naples, FL	Hideaway Golf Club La Quinta, CA	Philadelphia Country Club Philadelphia, PA	The Forest Country Club Fort Myers, FL
American Yacht Club Rye, NY	Colonial Country Club Fort Worth, TX	High Hampton Cashiers, NC	Pine Tree Golf Club Boynton Beach, FL	The Honors Course Chattanooga, TN
Annapolis Yacht Club Annapolis, MD	Congressional Country Club Bethesda, MD	Hobe Sound Golf Club Hobe Sound, FL	Piping Rock Club Locust Valley, NY	The Kittansett Club Marion, MA
Atlanta Athletic Club Johns Creek, GA	Cosmos Club Washington, D.C.	Hudson National Golf Club Croton-on-Hudson, NY	Port Royal Club Naples, FL	The Landings Club Savannah, GA
Augusta Country Club Augusta, GA	Country Club of Buffalo Williamsville, NY	Hunters Run Country Club Boynton Beach, FL	Quail Ridge Country Club Boynton Beach, FL	The Los Angeles Country Club Los Angeles, CA
Augusta National Golf Club Augusta, GA	Country Club of Rochester Rochester, NY	Hyannisport Club Hyannis Port, MA	Quail West Golf & Country Club Naples, FL	The Loxahatchee Club Jupiter, FL
Badminton and Racquet Club of Toronto Ontario, Canada	Cove Club Cabo San Lucas, Mexico	Idle Hour Club Macon, GA	Roaring Gap Club Roaring Gap, NC	The Olympic Club San Francisco, CA
Bakers Bay Golf & Ocean Club The Bahamas	Congressional Country Club Bethesda, MD	Interlachen Country Club Edina, MN	Rolling Rock Club Ligonier, PA	The Point Saranac Lake, NY
Baltimore Country Club Baltimore, MD	Cosmos Club Washington, D.C.	John's Island Club Indian River Shores, FL	Round Hill Club Greenwich, CT	The Quarry at La Quinta La Quinta, CA
Baltusrol Golf Club Springfield, NJ	Country Club of Buffalo Williamsville, NY	Jupiter Hills Club Tequesta, FL	Royal Auckland and Grange Golf Club Auckland, NZ	The Quechee Club Quechee, VT
Beach Point Club Mamaroneck, NY	Country Club of Rochester Rochester, NY	Jupiter Island Club Hobe Sound, FL	Royal Oaks Country Club Houston, TX	The Reserve Indian Wells, CA
Bel-Air Bay Club Pacific Palisades, CA	Dallas National Golf Club Dallas, TX	Kansas City Country Club Mission Hills, KS	Royal Palm Yacht & Country Club Boca Raton, FL	The Santaluz Club San Diego, CA
Belfair Property Owners' Association Bluffton, SC	Dallas Petroleum Club Dallas, TX	Kiawah Island Community Association Johns Island, SC	Sailfish Point Hutchinson Island, FL	The Tryall Club Montego Bay, Jamaica
Belle Meade Country Club Nashville, TN	Denver Country Club Denver, CO	Lakeside Country Club Houston, TX	San Francisco Yacht Club Belvedere, CA	The University Club of Washington D.C. Washington D.C.
Berkeley Hall Club Bluffton, SC	Des Moines Golf & Country Club Des Moines, IA	Lancaster Country Club Lancaster, PA	Sarasota Yacht Club Sarasota, FL	The Yale Club of New York City New York, NY
Big Canyon Country Club Newport Beach, CA	Desert Highlands Association Scottsdale, AZ	Lost Tree Club North Palm Beach, FL	Saucon Valley Country Club Bethlehem, PA	Thunderbird Country Club Rancho Mirage, CA
Biltmore Forest Country Club Asheville, NC	Desert Mountain Club Scottsdale, AZ	Marrakesh Country Club & Community Palm Desert, CA	Sawgrass Country Club Ponte Verde Beach, FL	The Toronto Lawn Tennis Club Ontario, Canada
Blowing Rock Country Club Blowing Rock, NC	Detroit Golf Club Detroit, MI	Martis Camp Club Truckee, CA	Scioto Country Club Columbus, OH	TPC Sawgrass Ponte Vedra Beach, FL
Blue Ridge Mountain Club POA Blowing Rock, NC	Dorado Beach Puerto Rico	Maui Country Club Paia, HI	Seabrook Island Club Seabrook Island, SC	Tradition Golf Club La Quinta, CA
Boca West Country Club Boca Raton, FL	Dunes Golf & Beach Club Myrtle Beach, FL	Meadow Club Fairfax, CA	Shady Canyon Golf Club Irvine, CA	Trout National - The Reserve Vineland, NJ
Bohemian Club San Francisco, CA	East Lake Golf Club Atlanta, GA	Medinah Country Club Medinah, IL	Shorehaven Golf Club Norwalk, CT	Union Club of the City of New York New York, NY
Bonita Bay Club Bonita Springs, FL	El Dorado Golf & Beach Club San Jose del Cabo, Mexico	Mediterra Community Association Naples, FL	Skokie Country Club Glencoe, IL	University Club of Chicago Chicago, IL
Boston Golf Club Hingham, MA	Eldorado Country Club Indian Wells, CA	Menlo Country Club Woodside, CA	Snowmass Club Snowmass Village, CO	Wade Hampton Golf Club Cashiers, NC
Brae Burn Country Club Purchase, NY	Estancia Club Scottsdale, AZ	Merion Golf Club Ardmore, PA	Southern Hills Country Club Tulsa, OK	Waialae Country Club Honolulu, HI
Broken Sound Club Boca Raton, FL	Exmoor Country Club Highland Park, IL	Monterey Peninsula Country Club Pebble Beach, CA	St. Andrews Country Club Boca Raton, FL	Washington Golf & Country Club Arlington, VA
Brook Hollow Golf Club Dallas, TX	Farmington Country Club Charlottesville, VA	Multnomah Athletic Club Portland, OR	St Andrews Links Trust St Andrews, Scotland	Waverley Country Club Portland, OR
Capilano Golf and Country Club Vancouver, BC	Fiddlesticks Country Club Fort Myers, FL	Myers Park Country Club Charlotte, NC	St. Francis Yacht Club San Francisco, CA	Wee Burn Country Club Darien, CT
Carmel Country Club Charlotte, NC	Fisher Island Club Fisher Island, FL	Myopia Hunt Club Hamilton, MA	St. George's Golf & Country Club Etobicoke, Ontario	Westchester Country Club Rye, NY
Castle Pines Golf Club Castle Rock, CO	Frenchman's Creek Golf & Beach Club Palm Beach Gardens, FL	Nanea Kailua-Kona, HI	The Apawamis Club Rye, NY	West Side Tennis Club Forest Hills, NY
Cat Cay Yacht Club Bimini Islands, Bahamas	Fresh Meadow Country Club Lake Success, NY	NCR Country Club Dayton, OH	The Bridges at Rancho Santa Fe Rancho Santa Fe, CA	Wianno Club Osterville, MA
Charlotte Country Club Charlotte, NC	Glen Oak Country Club Glen Ellyn, IL	Oakland Hills Country Club Bloomfield Hills, MI	The Century Association New York, NY	Willow Oaks Country Club Richmond, VA
Cherokee Country Club Knoxville, TN	Glen View Club Golf, IL	Oakmont Country Club Pittsburgh, PA	The Chicago Club Chicago, IL	Windstar on Naples Bay Naples, FL
Cherokee Town & Country Club Atlanta, GA	Golf Club of Avon Avon, CT	Ocean Forest Golf Club Sea Island, GA	The Club at Las Campanas Santa Fe, NM	
Cherokee Plantation Yemassee, SC	Governors Club Chapel Hill, NC	Ohoopee Match Club Cobbtown, GA	The Club at Morningside Rancho Mirage, CA	
Chevy Chase Club Chevy Chase, MD	Greenwich Country Club Greenwich, CT	Old Palm Golf Club Palm Beach Gardens, FL	The Club at Quail Ridge Boynton Beach, FL	
Chileno Bay Golf & Beach Club Cabo San Lucas, MX	Grey Oaks Naples, FL	Old Sandwich Golf Club Plymouth, MA	The Country Club Pepper Pike, OH	

RECENTLY CLOSED SEARCHES

DISPLAYING Q4 2025 SUCCESS

Austin Country Club | General Manager/COO
Basingstoke Golf Club | Course Manager
Bent Creek Country Club | General Manager
Birchwood Country Club | Director of Racquets
Blythefield Country Club | General Manager/COO
Boulder Country Club | Director of Racquets
Boulder Country Club | General Manager/COO
Caldy Golf Club | General Manager
Chapel Hill Country Club | Director of Finance & Accounting
Chapel Hill Country Club | General Manager/COO
Colorado Golf Club | General Manager/COO
Columbia Country Club | Director of Racquets
Desert Mountain Club | Clubhouse Manager - Apache Clubhouse
Desert Mountain Club | Director of Fitness
Fiddler's Creek Foundation | General Manager
Framingham Country Club | Director of Club Operations
Frenchman's Reserve Country Club | General Manager/COO
Glen Oaks Club | General Manager/COO
Hardscrabble Country Club | Executive Chef
Hideaway Golf Club | Director of Agronomy
Hideaway Golf Club | General Manager/COO
Hobe Sound Golf Club | Clubhouse Manager
Huntington Crescent Club | Director of Finance & Accounting
Kuki'o Golf and Beach Club | Executive Chef
Lake Waramaug Country Club | General Manager
Laredo Country Club | Head Racquets Professional

New Golf Club Development in St Andrews Golf Course | Equipment Manager
New Golf Club Development in St Andrews | Head of Facilities A&M Fife
New Golf Club Development in St Andrews | Head of Finance A&M Fife
North Ridge Country Club | Assistant General Manager
Oceana Key Biscayne Condominium Association | General Manager
Parkstone Golf Club | Golf Operations Manager
Pensacola Country Club | General Manager/COO
Philadelphia Country Club | Chief Financial Officer
Premier Club in Continental Europe | Director of Agronomy
Prestwick Golf Club | Clubhouse Operations Manager
River Hills Club | General Manager
Riverton Country Club | Executive Chef
Rose Hill Plantation Property Owners' Association | General Manager
Royal Dornoch Golf Club | Head of Golf
Royal Oaks Country Club | Executive Chef
Scioto Country Club | Assistant General Manager
Sharon Heights Golf & Country Club | Clubhouse Manager
South Hills Country Club | General Manager/COO
St Enodoc Golf Club | Director of Golf
St. Andrews Country Club | Director of Facilities & Engineering
The Country Club of Jackson | Director of Finance & Accounting
The Executive Branch | General Manager
The Forest Club | Director of Facilities
Westwood Country Club | Director of Golf
Wexford HOA | Clubhouse Manager
Wilderness Country Club | Executive Chef
WindRiver Lakefront & Golf Community | General Manager

ACTIVE SEARCHES

*The most trusted name in
Executive Search and Consulting.*

Click the play button to the left to browse our active searches.

We focus on executive search and consulting projects in the United States and Internationally, primarily in the United Kingdom, Ireland, Canada, Mainland Europe, the Middle East, Asia, Africa, Australia, and New Zealand.

TESTIMONIALS

CRYSTAL DOWNS COUNTRY CLUB | GENERAL MANAGER

“When the Board of Governors decided to hire our Club’s first General Manager in its 100-year history, we turned to KOPPLIN KUEBLER & WALLACE for help with the search. As a highly ranked club located in a remote part of the country, we face unique hiring and cultural challenges. I was impressed by how thoroughly KK&W listened to us and took the time to understand our specific needs, ultimately presenting several exceptionally qualified candidates who fit our requirements. Unlike many search firms I’ve worked with in my career, KK&W never pushed a particular candidate--they remained focused on what was best for our club.”

CLUB PRESIDENT | MICHIGAN

TORONTO LAWN TENNIS CLUB | GENERAL MANAGER/COO

“On behalf of the Toronto Lawn Tennis Club, one of Canada’s oldest and most prestigious private clubs, we acknowledge the exceptional services provided by KOPPLIN KUEBLER & WALLACE in our search for a General Manager/Chief Operating Officer. Our Recruitment Task Force requested a broad range of candidates, from within the club industry to the hospitality sector, including experienced assistant GMs. The candidates were outstanding, reflecting KK&W’s depth of understanding of our needs and the broader market. What truly set them apart was the organized, thoughtful approach they took in managing the search. Thanks to KK&W’s wisdom, guidance, and expertise, we are confident that the future of TLTC is bright.”

CLUB PRESIDENT | ONTARIO

WOODLAND GOLF CLUB | GENERAL MANAGER

“I wanted to reach out to let you know how impressed I was with the level of professionalism you and KK&W provided throughout the entire search process. Being three weeks into my presidency, I was not prepared to dive into a full-blown GM search. Partnering with KK&W provided a level of visibility into the field of qualified candidates that we could never have attained on our own. Your willingness to take the time to learn about our culture, values and vision brought a high level of comfort to the relationship. From signing on with KK&W to signing a great new GM, everything was perfectly managed.”

CLUB PRESIDENT | MASSACHUSETTS

BIRMINGHAM ATHLETIC CLUB | GENERAL MANAGER

As we are entering a new year, I wanted to reach out to express my appreciation for your firm’s work over the past year in successfully placing our new General Manager/COO. Your professional approach and commitment to our organization’s success have been truly remarkable. We are confident this placement brings stability and continued excellence to our organization. Your firm’s dedication to our success speaks volumes about your professional standards and commitment to client satisfaction.”

CLUB PAST PRESIDENT | MICHIGAN

[CLICK HERE FOR ADDITIONAL CLIENT REFERENCES](#)

CLUB LEADERSHIP ALLIANCE

The Core Values of the Club Leadership Alliance will serve as a framework for the proven best practices that create relevant and enduring clubs: Informed Leadership, Strategic Stewardship, Empowered Management and Team, and Compelling Member Experience.



☑ WHO WE ARE

Kopplin Kuebler & Wallace, McMahon Group, and Club Benchmarking, three of the most highly respected firms serving private clubs, have established the Club Leaders Alliance. After more than ten years of working together independently, the firms felt it was essential to work more closely to more effectively serve clubs in all their operational, financial, staffing, strategic and facility aspects.

☑ WHAT WE DO

Whether it is management search, understanding club finances, strategic planning or facility planning; the Alliance member firms have the unequalled expertise and skills to resolve any club challenge.

☑ HOW WE CAN HELP

The Alliance partners are available individually or together as a team to assist you and your club in any way needed to solve your club's most challenging issues.

GIVING BACK: *Our Commitment In Action*

We believe a stronger, more informed, and more connected industry benefits everyone; our clients, our candidates, and the generations of talent to come. This is why we intentionally reinvest our time, resources, and expertise into initiatives that elevate our profession.

- As a team, we have collectively donated countless hours to industry-wide education endeavors. Additionally, we provide significant financial support to The Club Foundation, Awards/Recognition Programs, and Professional Association Programming.
- KK&W is a proud and long-time donor to Tee It Up for the Troops. Their mission is to honor, remember, respect and support all those who serve in the armed forces. The organization has donated over \$10,000,000 to more than 335 veterans organizations that support all those who serve(d) in the armed forces.



FIVE PILLARS OF HOSPITALITY

A full or half-day customizable workshop offered at a reduced cost, designed for member-facing managers and teams.

Provide team members with a foundational working toolkit of skills to deliver natural, engaging hospitality to your members and their guests. Areas of focus include:

- Luxury Service
- Teamwork
- Active Listening
- Problem Solving
- Handling Complaints



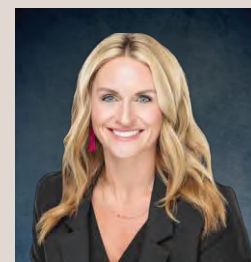
INTERIM CLUB MANAGEMENT SOLUTIONS

Bringing in an interim manager empowers a club's board with the ability to address critical opportunities to strengthen operations prior to the arrival of the incoming leader. Clubs searching for new team members to fill critical roles face pressure to "complete the search," but with an interim manager it's possible instead to "strengthen the search."

An experienced interim manager provides tremendous opportunity to ensure the continuance of quality, day-to-day operations and advance club operations in an expert and expeditious manner.



ZACHARY PLATEK, CCM, CCE
Interim Management Director
zach@kkandw.com
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CHRISTY LATIMORE
Support & Development
christy@kkandw.com
(785) 410-2004

- ✓ General Managers/Chief Operating Officers
- ✓ Chief Executive Officers
- ✓ Clubhouse Managers
- ✓ Golf Course Superintendents
- ✓ Directors of Golf
- ✓ Fractional CFOs

ADDITIONAL CONSULTING & TRAINING OPPORTUNITIES

CLICK THE TILES BELOW FOR MORE INFORMATION



INDUSTRY PARTNERSHIPS & AFFILIATIONS



THANK YOU FOR YOUR CONSIDERATION!

We will be your trusted partners in the club industry and we take a long-term approach to everything we do. We join your team the day you hire us, and our relationship will evolve in perpetuity as together we make your club the best it can be!

We are committed to the success of our clients, the professionals that we place, and the industry we love. We improve the well-being of our clients, advance the careers of our candidates, and have fun every day.

Sincerely, The KOPPLIN KUEBLER & WALLACE Team

Dick Kopplin | Partner
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dick@kkandw.com

Kurt Kuebler | Partner
561-747-5213
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Tom Wallace | Partner
412-670-2021
tom@kkandw.com



KOPPLIN KUEBLER & WALLACE

THE MOST TRUSTED NAME IN EXECUTIVE SEARCH AND CONSULTING

THIS IS NOT AN OFFICIAL AGREEMENT. THE OFFICIAL AGREEMENT WILL BE SENT VIA ADOBE SIGN ONCE KK&W HAS BEEN CHOSEN AS YOUR EXECUTIVE SEARCH FIRM.

Executive Search Agreement For University Park Country Club General Manager/Chief Operating Officer Search

Preamble: KOPPLIN KUEBLER & WALLACE, LLC (The Search Executive or KK&W), will discuss with Steve Heitzner, Chairman, Board of Supervisors of **University Park Country Club (UPCC)**, (the Client), the Board of Directors, and others as the Client designates, the type of candidate desired and how the search would be conducted.

Position Description: The Search Executive will write a position profile, which defines the specific requirements the client desires in this position. He will then present this position profile to the Client for agreement and approval. Sam Lindsley is the lead search executive on this assignment. KK&W reserves the right to assign a company Search Executive of their choice to assist in overseeing the search efforts.

Review process: The Search Executive will focus on recruiting appropriate candidates who are successfully employed in similar club environments or hospitality environments. Additionally, he will review the KK&W database of resumes for prospective candidates who match the position profile.

Candidate discovery: The Search Executive will conduct numerous interviews, using personal and professional contacts, to evaluate the best possible candidates. Personal interviews of each candidate will be completed with a focus on competence, integrity, and compatibility with the approved profile and specifications, and will seek out prospective candidates.

Candidate interviews: The Search Executive will recommend to the Client the final slate of candidates for a personal interview. The Search Executive will provide the Client results of initial interviews, reference checking, and any relevant data leading to the list of recommended candidates.

Employment offer and negotiations: After the Client has selected the final candidate the Search Executive will provide assistance with the compensation package as requested. He will also provide industry averages and a typical agreement letter, which may be modified for use by the Client. The Search Executive will not make any commitments nor bind the client to any employment terms.

Executive search and placement fee: The fee for this service is \$42,500.00 with a \$21,250.00 deposit due at the signing of the search agreement. This pricing is valid for sixty (60) days from the date of this presentation. The balance is due when the candidate agrees to employment with the Client.

Travel, interview, and advertising expenses: The Client will pay all reasonable travel, search, and interview-related expenses for prospective candidates and the Search Executive. These expenses will be billed within the month incurred with all accounts to be remitted within thirty days of billing. (Note: Typically, Search Executive generated expenses for a search of this type will run between \$4,000 and \$6,000, plus reimbursements to candidates for their travel expenses, if any). When applicable, the Client will also pay industry-related position advertising expenses and the Behavioral/Skills assessment fees.

Board Dynamic & Team Development Seminars: KK&W agrees to conduct the Board Dynamics seminar for the Board of Directors and the new General Manager/Chief Operating Officer at **UPCC**. The fee for this service is included in the initial search fee. KK&W also agrees to conduct the Team Development seminar for the new General Manager/Chief Operating Officer and Team members at a specially reduced client rate. KK&W will provide these two services for **UPCC** within one year of the General Manager/Chief Operating Officer's placement, at the discretion of the club. The client will pay all reasonable travel expenses associated with these programs.

Confidentiality Acknowledgement: By signing this agreement, you agree to recognize that all of our Search materials and processes are considered proprietary information. This information is intended to be shared only with the members of the Search Committee and Officers of the club involved with the search process. Any use of information and materials without expressed written consent is prohibited.

Termination of Search Agreement: The Client may terminate this agreement at will up until thirty (30) days after signing the agreement by notifying the Search Executive in writing of the intent to do so. The Client agrees to pay all reasonable expenses incurred by the Search Executive up to the time of the termination of the agreement. After the thirty (30) day period the Client agrees to forfeit the entire deposit paid to the Search Executive and to pay all reasonable expenses incurred by the Search Executive up to the time of the termination of the agreement. The Search Executive may terminate this agreement at any time by notifying the Client in writing of the intent to do so. Any deposit paid would be returned to the Client, minus reasonable expenses incurred by the Search Executive up to the time of the termination of the agreement.

Arizona law: This agreement will be construed in accordance with the laws of the State of Arizona.

Recovery of legal fees: In the event of any dispute between the parties concerning this agreement the prevailing party will be entitled to reasonable attorney fees and costs.

Candidate replacement: The Search Executive agrees to replace the General Manager/Chief Operating Officer candidate within two years of the date of this search agreement if the candidate is released from the Client's employment for cause or lack of performance. The Search Executive also agrees to replace the General Manager/Chief Operating Officer candidate within two years of the date of this search agreement if the candidate leaves the employment of the club of his/her own accord for any reason. There is no fee for this replacement but the Client would pay reasonable expenses for the Search Executive.

Non-Recruitment: For over thirty years, KK&W, as one of its core values, has refrained from recruiting any candidates they place unless they have permission from the club.

Initiation of search assignment: The Search Executive will initiate the search for the Client when the signed Executive Search Agreement and the deposit check have been received. KK&W will not initiate or commence a search engagement for a position currently held by an incumbent unless the incumbent's resignation or termination has been formally effected, or the incumbent has been formally notified in writing of such impending change. This restriction does not apply if the incumbent has already resigned or if the position is newly created.

Agreement: If this agreement is acceptable to you please sign and return the enclosed copy of this agreement. This agreement is effective as of the date of the last signature.

Agreed to by:

Thomas B. Wallace, III CCM, CCE, ECM
Partner
KOPPLIN KUEBLER & WALLACE, LLC.

Steve Heitzner
Chairman, Board of Supervisors
University Park Country Club

Dated _____

Dated _____



Request For Proposal

Prepared For:

University Park Country Club
7671 The Park Boulevard
University Park, FL 34201

Prepared By:

Fokus Forward LLC
dba Strategic Club Solutions
10556 N Port Washington Road
Suite 202
Mequon, WI 53092
P: 262-661-2582

Ryan Doerr, President



STRATEGIC CLUB SOLUTIONS



How We Can Help

Finding the right General Manager/Chief Operating Officer is one of the most consequential decisions a Board will make. At Strategic Club Solutions, we have built our entire firm around getting that decision right. Our national presence, deep industry relationships, and a proprietary process refined across hundreds of placements have produced the strongest placement success rate in the industry at 98.2%. We know what great club leaders look like, where to find them, and how to determine whether they are the right fit for University Park Country Club before you ever meet them.

Some firms rely on the same pool of candidates, frequently cycling them through new roles to collect fees. Some prioritize candidates' interests over the property's needs, creating a conflict of interest. At SCS, we work exclusively for you, ensuring alignment with your goals and long-term success. We never recruit away our placements, and our Flat Rate TruFit Search offers a predictable investment, an industry-leading approach, and the highest placement success rate. Our model is cost-effective, allowing clubs and communities to allocate more resources toward attracting the right talent. We partner with the board to facilitate a seamless transition and conduct scheduled check-ins throughout the first year to ensure ongoing success and address any challenges.

Your Search Team

This search will be led by Rob Schlingmann, CCM, CCE, CAM, supported by Ryan Doerr (President), Michelle Cocita, Erica Martin, and Christina Watson, CCM, with the full resources of the Strategic Club Solutions national network behind every phase of the search.

SCS commits to never recruiting away a successfully placed candidate. Once we place a leader at your Club, that relationship is protected. To learn more about our team and our work, visit www.strategicclubsolutions.com.

We Use a Different Lens

One of the keys to the success of our TruFit process is that we are constantly working with clubs and communities in the boardroom, on the course, in the dining room, and in the trenches of the operations. We understand the operational expectations required to execute in today's environment in a variety of club types and situations. We also know what great managers look like (and what they don't). As consultants and professional problem solvers, we ask the right questions to understand the club and community's culture and expectations. This understanding is critical to our TruFit process. You shouldn't have to wonder if this new leader will be the right one.

Beyond the Resumé

Resumés can be deceiving; hiring based solely on a resumé will surely fail. With our TruFit process, we go well beyond the resumé, evaluating experience, hard and soft skills, and professional references (listed and unlisted), and researching the candidate's reputation and credibility. While experience and a proven track record are important, understanding the candidate's perspective, goals, objectives, and TruFit to the personality and brand experience of the club and community is critical to a successful placement.

Every finalist in our process also completes the DISC Workplace Insights assessment, giving us a validated behavioral and cognitive portrait of each candidate that a resumé cannot provide.

Our TruFit Process

Discovery, Goals, and Defining Success

- Conduct an on-site visit to experience the Club firsthand and meet with the Board and/or Search Committee.
- Facilitate structured discussions with key stakeholders to clearly define what success looks like in the role.
- Identify required leadership competencies, technical expertise, and cultural attributes necessary for long-term alignment.
- Develop an ideal candidate “avatar” profile outlining hard skills, soft skills, leadership style, and alignment with the Club’s strategic objectives and member experience standards.

Develop the Position Marketing Document

SCS will use the University Park Country Club’s job description and the insights from defining the ideal candidate to create a “Position Marketing Document.” If a job description is not available, SCS will help develop one.

University Park Country Club and SCS will establish the ideal candidate’s desired outcomes, goals, and objectives. We will cover Club history, key metrics, and future vision for the Club, and define compensation and benefits to attract and clarify with candidates.

Active TruFit Search Process: Search, Qualify, and Present

We reach out to our Regional and National Network of Top Talent nationwide, identifying candidates that fit the TruFit avatar profile for University Park Country Club. Every candidate is individually qualified by our team before being presented to the Search Committee, ensuring the slate you receive represents only those who meet the standard, not just those who applied.

- SCS presents the finalist slate to the Search Committee via virtual meeting, with a full briefing from our team on each candidate.

- We conduct an initial Zoom introduction call with leading candidates for the first round of virtual interviews.
- Reference checks are initiated in parallel with virtual interviews.
- Each finalist is accompanied by a comprehensive Candidate Summary.

The Candidate Summary goes well beyond a resume package. For each finalist, it includes a narrative career overview, compensation expectations, motivation for the role, and a structured alignment analysis mapped directly to University Park Country Club's leadership priorities and strategic objectives. Assessment results are translated into a practical behavioral portrait covering communication style, decision-making tendencies, and performance under pressure, with specific implications for how that candidate will lead the operation, engage with the Board, and fit University Park Country Club's culture.

Reference Development

SCS conducts reference checks with listed and unlisted references through a secure digital survey platform, followed by direct follow-up from our search consultant to explore any findings that warrant a deeper conversation. Unlisted references are particularly valuable: these are peers, subordinates, and industry contacts identified through our network who can speak candidly about a candidate's leadership reputation without the filter of a prepared endorsement.

The structured survey, combined with consultant follow-up, is designed to give the Search Committee a consistent, documented view of each finalist's leadership reputation and how they are experienced by the people around them. Findings are incorporated into the overall candidate assessment and inform the targeted questions SCS brings into the onsite interview, ensuring nothing significant goes unexplored before a hiring decision is made.

Vet Finalists with our TruFit Pre-Hire Assessment Tool

Resumés and interviews tell part of the story. Our TruFit assessment process gives the Search Committee a deeper, comparative view of how each finalist is wired to lead, communicate, and perform, mapped directly against University Park Country Club's culture, membership expectations, and leadership demands.

SCS administers the DISC Workplace Insights assessment for each leading candidate. This tool combines two powerful evaluation frameworks:

Core Workplace Strengths: Based on Dr. Robert S. Hartman's critical thinking research, this component evaluates four factors essential to leadership performance: the ability to work effectively with others, to get things done under pressure, to prioritize the right activities, and to take personal responsibility and accountability. Each factor is scored, producing an overall Satisfactory or Cautionary indicator that tells the Search Committee how a candidate is likely to apply their experience and credentials on the job.

DISC Behavioral and Communication Style: This component reveals how each candidate is naturally wired to lead, communicate, delegate, and respond under pressure. Rather than

evaluating DISC in isolation, we map each finalist's behavioral profile against the specific demands of University Park Country Club's environment and culture, giving the Search Committee a clear picture of fit before anyone sets foot in the building.

Together, these two components give the Search Committee a cognitive and behavioral portrait of each finalist, not just what they have done, but how they are likely to lead, make decisions, and engage with the Board, members, and staff at University Park Country Club.

Onsite Interview Day

SCS coordinates and facilitates in-person interview days for the top two to three GM/COO finalists at University Park Country Club. On-site interviews are typically four to six hours per candidate, providing meaningful time for structured evaluation, informal engagement, and a thorough read of each finalist. Having an SCS representative on-site ensures the process is structured, consistent, and defensible across all candidates.

Our onsite role includes:

- Designing a competency-based interview framework tailored to University Park Country Club's leadership priorities, culture, and strategic objectives identified during the discovery phase.
- Briefing the Search Committee and key stakeholders in advance so everyone enters the room aligned on what they are evaluating and why.
- Facilitating and participating in structured interviews that go beyond rehearsed answers, using behavioral and situational questioning informed by each candidate's assessment results and reference findings.
- Guiding candidate interactions with key staff and member-facing stakeholders to observe how finalists engage outside the formal interview setting.
- Leading a structured debrief with the Search Committee following each interview day to synthesize observations, surface concerns, and move toward a confident decision.

Upon completion of the interview process, SCS leads offer development and negotiation in coordination with University Park Country Club's Board and legal counsel, ensuring the final terms reflect the Club's interests and position you competitively to close the right candidate. Second-round interviews may be scheduled as needed, and SCS will conduct a criminal background check on the selected finalist before extending an offer.

Post-Placement Partnership

Placing the right leader is only the beginning. SCS remains an active partner throughout the first year and beyond, providing structured support for the General Manager/Chief Operating Officer, the Board President, and Club leadership to ensure a successful transition and long-term alignment.

- 7-day, 30-day, 60-day, 90-day, 6-month, 9-month, and 12-month check-ins with the General Manager/Chief Operating Officer and Club during the first year of placement.

- 30-day, 60-day, 90-day, 6-month, 9-month, and 12-month check-ins with the Board President to ensure alignment and ongoing governance support.
- Ongoing support for the General Manager/Chief Operating Officer and Board throughout the first year.
- 24-month placement guarantee.

Board Alignment Retreat and Annual Evaluation

Our partnership with University Park Country Club does not begin at day one of the new GM/COO's tenure; it begins before they walk in the door. The Board Alignment Retreat is the first formal step in that ongoing relationship, bringing the Board and incoming General Manager/Chief Operating Officer together around shared priorities and a unified vision before the work begins.

Following placement, SCS will facilitate a structured Board Retreat to strengthen governance alignment, clarify priorities, and reinforce the Board's role in guiding University Park Country Club's long-term success. Participants typically include the Board of Directors, the incoming General Manager/Chief Operating Officer, and other key leaders as determined by the Club. This session is designed to produce actionable governance clarity, not simply conversation.

The Annual Board Evaluation builds on that foundation. Conducted each year, it establishes a baseline in year one and tracks meaningful progress over time, giving the Board a consistent, structured tool to assess leadership, governance, and Club performance year over year. Together, the retreat and the evaluation reflect SCS's commitment to your Club's success long after the search concludes.

Investment

Strategic Club Solutions is committed to delivering an exceptional search experience and an outstanding outcome for University Park Country Club. Because of our genuine interest in partnering with the Club and our confidence in the value our TruFit process delivers, we are pleased to offer a competitive fee structure for this engagement.

Service	Standard Fee	Partnership Fee
Full Executive Search (GM/COO)	\$44,000	\$36,000

Effective upon signing. This rate is offered because of our genuine interest in continuing our partnership with University Park Country Club and is valid for sixty (60) days from the date of this proposal.

What's Included

Our Flat Rate TruFit Search includes up to 6 pre-hire assessments, one criminal background check, job posting, the Board Alignment Retreat, and the first Annual Board Evaluation. There are no percentage-of-salary calculations, no surprise invoices, and no incentive on our end to inflate the offer. The investment you see is the investment.

Additional expenses that may be incurred and billed at cost:

- Paid advertising, if requested by the Club.
- Additional pre-hire assessments at \$199 each.
- Additional background checks at \$499 each (covers county criminal, global watchlist, national criminal, sex offender search, SSN trace, and motor vehicle). Please note that background checks generally take 7 to 10 days, depending on where a candidate has lived and worked.
- Travel expenses for SCS will be billed at cost. All expenses will be agreed to and confirmed in advance via email.
- Final candidates' travel exceeding 30 miles will be reimbursed directly by University Park Country Club to the candidate.

Payment Schedule

Billing is split into four payments. The initial payment is due upon signing. Additional payments are billed monthly, with the balance due at the time the final offer is presented to the candidate.

Compensation Context

Based on our understanding of the role, the ideal candidate for University Park Country Club will be in the competitive salary target range of \$240,000 to \$270,000 base salary plus bonus, commensurate with experience, and a benefits package including medical, dental, vision, 401(k), and other benefits consistent with the Club's benefit plan. Additional considerations for continuing education, conferences, phone, vehicle, uniforms/attire, and parking will be clarified with the Club. Relocation assistance and other considerations may be added to secure the right candidate. University Park Country Club will approve all terms before anything is extended beyond what is originally determined.

Search Timeline

The following timeline assumes prompt approval of position documents, reasonable schedule flexibility from candidates, and timely decision-making from the Club.

- Phone/video interviews with top candidates presented to the Search Committee: 4–8 weeks from launch.
- In-person interviews at the Club: 6–10 weeks from launch.
- Offer in hand: 7–10 weeks from launch, provided agreement on the right candidate.

Agreement Terms

This is an exclusive search agreement. In the event the Club decides to hire through another firm, or independently after this agreement is signed, the full fee remains due. All inbound candidates who apply directly to the Club should be directed to SCS for vetting to ensure consistent, effective selection criteria throughout the process.

Weekly progress reports will be sent to the designated Club contact following the initial search launch, with a full breakdown of activity and pipeline status.

Placement Guarantee: If the placed candidate does not perform to expectations within the first 24 months, Strategic Club Solutions will complete the replacement search at no fee. Only hard costs (travel, assessments, and background checks) would be passed to the Club during a replacement search.

Our Commitment to University Park Country Club

Strategic Club Solutions brings its full resources, network, and expertise to this search. We are confident in our process, committed to your success, and honored to be considered as your search partner.

This proposal reflects our genuine interest in University Park Country Club and our belief that the right leader, placed through a rigorous and intentional process, will make a lasting difference for your members, your team, and your Club.

Confidentiality: All search materials, candidate information, and processes developed in connection with this engagement are the proprietary information of Strategic Club Solutions. This information is intended to be shared only with members of the Search Committee and Officers of the Club involved in the search process. Both parties agree to maintain all such information in strict confidence. Any use or reproduction of search materials without the express written consent of SCS is prohibited.

Authorized by:

Ryan Doerr

President, Strategic Club Solutions

Date: _____



STRATEGIC CLUB SOLUTIONS



10556 N Port Washington Rd, Ste 202
Mequon, WI 53092 | 262.661.CLUB
Results@StrategicClubSolutions.com
www.StrategicClubSolutions.com



University Park Recreation District

Nominations / Appointment of Strategic Planning Committee Member

From: [Vivian Carvalho](#)
To: ["Steve Ferrara"](#)
Cc: [Kwame Jackson](#); [Sydney Johnson](#); [Ronni Loundy](#)
Subject: RE: UPRD Strategic Committee Interest – [Your Name]
Date: Monday, July 20, 2026 2:17:00 PM
Attachments: [2026 Ferrara Board Bio Final .pdf](#)

Good afternoon, Mr. Ferrara,

Thank you for your email and your interest in serving on the open position of the University Park Recreation District's Strategic Planning Committee.

Please let this email confirm that we received your email and bio prior to the deadline of July 17, 2026, at noon. Your information will be provided to the Board accordingly.

Additionally, Ronni Loundy, the Chair of the Strategic Planning Committee, has been copied on this email for awareness of your interest.

We appreciate you putting your name forward for consideration. The Board will be reviewing all resumes and bios at the upcoming Board of Supervisors meeting scheduled for July 28, 2026.

If you have any questions in the meantime, please do not hesitate to reach out.

Regards,

Vivian Carvalho
Senior District Manager

—
PFM Management Services LLC

carvalhov@pfm.com | **phone & text 407.723-5945** | **web** pfmmanagement.com [Home](#)
3501 Quadrangle Boulevard | Suite 270 | Orlando, Florida 32817



From: Steve Ferrara <steveferrara@outlook.com>
Sent: Saturday, July 11, 2026 12:18 PM
To: Vivian Carvalho <carvalhov@pfm.com>
Subject: UPRD Strategic Committee Interest – [Your Name]

ALERT: This message is from an external source. **BE CAUTIOUS** before clicking any link or attachment

Dear Vivian,

I am writing to express my interest in serving on the Strategic Planning Committee.

Below is a brief summary of my relevant background and experience:

Background & Experience:

I spent 40+ years in the accounting profession with many operational leadership roles, serving for my last 12 years as the COO of a large accounting firm. During my tenure I oversaw the development and implementation of our strategic plan, which resulted in us growing the firm from \$600 million to \$3 billion in revenues I was also responsible for our finance and IT functions amongst other things which provided me with experience in balancing priorities to best serve our firm.

I also have a strong background in corporate governance, having served on a number of Boards throughout my career.

I feel that my background is a good fit for the skills needed to participate on a strategic planning committee.

Why I'm interested:

My wife Diana and I recently purchased a home in University Park and we are both excited to get actively involved in the community.

I have previously worked with Dick Crouch who I believe can provide you input on my qualifications. My biography is enclosed for your review.

I look forward to the opportunity to contribute to the UPRD.

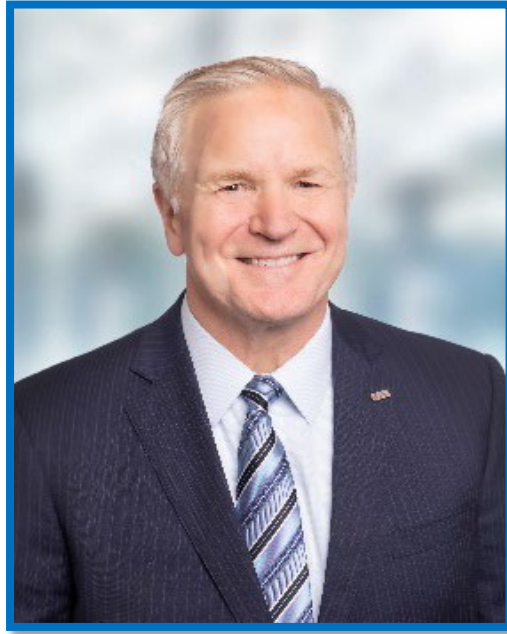
I'd be happy to answer any questions you might have. Thank you for your consideration.

Sincerely,

Steve Ferrara

Cell - (312) 286-9897

steveferrara@outlook.com



STEPHEN R. FERRARA
Board Advisor
Strategic Consultant

steveferrara@outlook.com

Mobile: 312-286-9897

Stephen R. Ferrara
Board Advisor
Strategic Consultant

EXPERIENCE SUMMARY

As an experienced Board Advisor, Steve specializes in guiding organizations through transformative change & strategic growth. Steve leverages his over 40 years of diversified business experience to provide insights that drive innovation, enhance operational efficiency, and maximize profitability, including his experience working at BDO USA PC (BDO) from 1991-2024.

His background includes facilitating growth and innovation, while implementing strategies to maximize profitability. Steve is focused on collaborating with executive teams to develop actionable strategies that align with business objectives.

Key Areas of Expertise:

- Strategic Planning & Execution
- Profit Enhancement
- Governance and Compliance
- Mergers & Acquisitions Strategy and integration
- Financial Oversight and Risk Management
- Market Analysis & Competitive Assessment
- Leadership Development & Succession Planning

Steve was BDO's COO from 2012 through June 2024, when he retired. During his tenure as the COO, BDO grew from \$600 million to \$3 billion in revenue. As the Firm's COO, Steve had overseen every aspect of the Firm's business and was a member of the Firm's Executive management team, where he helped develop strategy and set the direction for the Firm's future sustainability, growth, and profitability.

Steve was responsible for executing the Firm's mergers & acquisitions (M&A) strategy, applying his extensive experience and knowledge to form new ideas, concepts, and methods to help drive the Firm forward. He provided leadership by directing and coordinating all aspects of the M&A process. In his role Steve oversaw the acquisition and integration of over 80 businesses.

Steve oversaw many of the Firm's operational business units, including Finance, IT, People, Business Development, Marketing and Administrative Operations. He also directed the development and implementation of the Firm's national strategies and initiatives related to the Firm's Alliance, Innovation and Industry programs. In addition, Steve oversaw the Firm's International Liaison program and participated on the BDO network's Global Board Advisory Group to help set strategy and direction for the BDO Global Network.

Steve also envisioned and led the conversion of the Firm to an ESOP company in 2023, making BDO one of the largest employee-owned companies in America. He oversaw all aspects of the transaction, including conversion of the Firm from a partnership to a corporate entity, due diligence, valuation, developing a communication plan for partners and employees of the Firm and negotiating with lenders & the ESOP trustee.

Steve was a member of BDO's Board of Directors prior to becoming the Firm's COO. Upon becoming COO Steve was an ex-officio Board member, participating in all Board and Committee meetings from 2012-2024.

From 1997-2012 Steve had approximately 15 years of increasing management responsibility at BDO as both an office and regional managing partner where he was responsible for strategy, growth, profitability & people development, in addition to overseeing numerous client relationships. Steve used this experience to help him in executing his responsibilities as the firm's COO.

In addition to his leadership roles, Steve's experience included working with a variety of public and privately held clients, ranging from emerging businesses to international conglomerates, and coordinating relationships and annual audit, tax and SEC compliance services for entrepreneurial businesses in varying industries.

Steve has served as an advisor for companies on merger, acquisition, and divestiture transactions, including deal structuring, resolution of accounting issues, due diligence procedures and post transaction integration. He has also worked directly with many public companies, offering assistance with initial public offerings (including equity offerings, debt offerings, split-offs and reverse mergers into existing public companies), secondary offerings and other modes of raising capital.

PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants
Chicagoland Chamber of Commerce, Past Board member and Board Chair
Northern Illinois University Business School Advisory Board
Illinois Certified Public Accountants Society, Past Board member
Notebaert Nature Museum, Past Board Member & Past Board Chair
Young Presidents Organization Gold, Chicago Chapter, Past Board Member & Board Chair

EDUCATION

B.S., Accounting, Northern Illinois University
Licensed Certified Public Accountant, Illinois

From: [Vivian Carvalho](#)
To: ["William Mutryn"](#)
Cc: [Kwame Jackson](#); [Sydney Johnson](#); ["ronni.loundy@universityparkrd.com"](mailto:ronni.loundy@universityparkrd.com)
Subject: RE: Strategic Planning Committee Interest –Bill Mutryn
Date: Monday, July 20, 2026 2:20:00 PM

Good afternoon, Mr. Mutryn,

Thank you for your email and your interest in serving on the open position of the University Park Recreation District's Strategic Planning Committee.

Please let this email confirm that we received your email and bio prior to the deadline of July 17, 2026, at noon. Your information will be provided to the Board accordingly.

Additionally, Ronni Loundy, the Chair of the Strategic Planning Committee, has been copied on this email for awareness of your interest.

We appreciate you putting your name forward for consideration. The Board will be reviewing all resumes and bios at the upcoming Board of Supervisors meeting scheduled for July 28, 2026.

If you have any questions in the meantime, please do not hesitate to reach out.

Regards,

Vivian Carvalho
Senior District Manager

PFM Management Services LLC

carvalhov@pfm.com | **phone & text 407.723-5945** | **web** pfmmanagement.com [Home](#)
3501 Quadrangle Boulevard | Suite 270 | Orlando, Florida 32817



From: William Mutryn <wmutryn@gmail.com>
Sent: Monday, July 13, 2026 2:19 PM
To: Vivian Carvalho <carvalhov@pfm.com>
Subject: Fwd: Strategic Planning Committee Interest –Bill Mutryn

ALERT: This message is from an external source.**BE CAUTIOUS** before clicking any link or attachment

Dear Vivian,

I am writing to express my interest in serving on the Strategic Planning Committee. As you know, I applied to serve on this Committee about 6 months ago. My interest in serving has not changed. I was encouraged by Dick Crouch recently when I applied to be on the finance committee. I believe that I could contribute to the future well-being of our community and that is the reason for my interest.

Below is a brief summary of my relevant background and experience (and I have included my resume for your reference):

Background & Experience:

A short Bio is below. To summarize, I graduated and worked as an engineer for 5 years and then was an attorney in private practice for 43 years. I graduated from Case Western Reserve University in 1970 and George Washington University Law School, with high honors, in 1975. My last 25 years as a lawyer was with Holland & Knight, an international law firm and I was co-chair of its national corporate and M&A practice group. I represented parties in over 150 acquisition transactions and I was an adjunct professor at George Washington Law School for 5 years and a frequent speaker at industry events. I have extensive experience with Boards of Directors, both as a lawyer and as a member of about 10 corporate and non-profit Boards. Since 2017 I have been a partner in a Private Equity Group, Bluestone Investment Partners, during which I am a member of the Investment Committee and have been on numerous Boards of portfolio companies.

Why I'm Interested:

My wife, Cynde and I have owned a property in University Park since 2010. I have been the neighborhood Chair for Mayfair for about 5 years and an active tennis player and golfer. My wife is historian of and on the Board of the Women's club. We participate in many Club activities and use the facilities often. We go north for the summer to see family and friends and have a home in McLean Virginia also.

I believe that I have the perspective of active members of the community and know the views of many residents. I have experience in law and finance that I would bring to bear in planning decisions. We are here for the long term and desire to contribute to continue to make this community a wonderful place to live.

I look forward to the opportunity to contribute to the UPRD.

Sincerely,
William J Mutryn
240 447 7813
wmutryn@gmail.com

Bill Mutryn

Bill Mutryn is a Partner at Bluestone Investment Partners and member of the Investment Committee. Bill brings over 40 years of experience as a practicing attorney, most of which has been representing clients in merger and acquisition transactions in the aerospace, defense, government services, healthcare, consumer products, and staffing space. Prior to joining Bluestone Bill was a co-leader of Holland & Knight's Corporate and Mergers and Acquisitions Practice Group and served as a member of Holland & Knight's Directors Committee for 6 years. During the past two decades, Bill has served as lead counsel in over 150 merger and acquisition transactions. Transactions include the sale of Zeta Associates to Lockheed Martin, the sale of Scitor to Leonard Green, the sale of Digital Systems to General Dynamics, and the sale of Dynamics Research Corporation (DRC) to Engility following the acquisition by DRC of High Performance Technology.

Bill was admitted to practice law in Virginia and also has been a member of the bars of Maryland, the District of Columbia and numerous federal courts. Bill is a former president of the Association for Corporate Growth, National Capital Chapter, and he has written articles and lectured on a wide range of business law subjects. He has been named by his peers in several editions of The Best Lawyers in America for Corporate Law, Mergers & Acquisitions Law, as well as Leveraged Buyouts and Private Equity Law.

Bill also served as an adjunct professor at The George Washington University Law School, teaching "Mergers and Acquisitions of Private Entities" and is on the law school's Board of Advisors. Currently Bill was a member of the Board of Advisors of Cordia Partners and Deep Water Point Consulting, the Board of Directors of JetCars, Inc. and Minds Matter of DC, a non-profit organization. Bill has served on the Boards of

Directors of Bluestone's portfolio companies including cBeyond Data, Chesapeake Technology, Valiant, Axis Geospacial, Integral Solutions and Precise Systems.

Bill graduated with honors from the George Washington University Law School and has a B.S. in Engineering from Case Western Reserve University.

From: [Vivian Carvalho](#)
To: ["Beth Wolchock"](#)
Cc: [Kwame Jackson](#); [Sydney Johnson](#); ronni.loundy@universityparkrd.com
Subject: RE: UPRD Strategic Committee Interest – [Your Name]
Date: Monday, July 20, 2026 2:25:00 PM

Good afternoon, Ms. Wolchock,

Thank you for your email and your interest in serving on the open position of the University Park Recreation District's Strategic Planning Committee.

Please let this email confirm that we received your email and bio prior to the deadline of July 17, 2026, at noon. Your information will be provided to the Board accordingly.

Additionally, Ronni Loundy, the Chair of the Strategic Planning Committee, has been copied on this email for awareness of your interest.

We appreciate you putting your name forward for consideration. The Board will be reviewing all resumes and bios at the upcoming Board of Supervisors meeting scheduled for July 28, 2026.

If you have any questions in the meantime, please do not hesitate to reach out.

Regards,

Vivian Carvalho
Senior District Manager

PFM Management Services LLC
carvalhov@pfm.com | phone & text 407.723-5945 | web.pfmmanagement.com Home
3501 Quadrangle Boulevard | Suite 270 | Orlando, Florida 32817

-----Original Message-----

From: Beth Wolchock <bwolchock@aol.com>
Sent: Tuesday, July 14, 2026 12:20 PM
To: Vivian Carvalho <carvalhov@pfm.com>
Subject: UPRD Strategic Committee Interest – [Your Name]

ALERT: This message is from an external source.BE CAUTIOUS before clicking any link or attachment

Dear Vivian,
I am writing to express my interest in serving on the Strategic Planning Committee.
Below is a brief summary of my relevant background and experience

Background & Experience:

I've been a municipal bond underwriter for 4 decades and recently retired 2 weeks ago from Oppenheimer & Co. My work experience in finance provides me a comprehensive background about interest rate markets and all things related to business cycles.

In addition, having priced billions

of dollars of Municipal Bond New Issues for other country clubs as well as various project through the State and Country from roads, schools, water and sewer, hospitals and airports I understand the value of borrowing money vs assessments.

I also served on the Municipal Securities Rulemaking Board for 4 years as board member. Therefore, I have experience working with a group of people with differing ideas and opinions. I'm currently on the zoning board for the Village I live in NY.

Why I'm Interested:

I interested in serving on the strategic committee because of my background. I have served in leadership position at the various Broker dealers I worked for through the years. I have lived in UPCC for 12 plus years and I attend many of the recent meetings via zoom. I try to stay current on the happenings since the residents took over owning the club since 2019.

I look forward to the opportunity to contribute to the UPRD.

Sincerely,
Beth Wolchock
914-522-5294
Bwolchock@aol.com

Sent from my iPhone



University Park Recreation District

**Ratification of Payment Authorization Nos.
165 & 166**

University Park Recreation District

7/10/2026

Payment Authorization No. 165

O&M - General Fund Expenses

<u>Vendor</u>	<u>Invoice</u>	<u>Description</u>	<u>Amount</u>
McClatchy Media	130842	Notice of Public Meetings - June 2026	\$ 208.86
Vglobal Tech	8645	Quarterly ADA & WCAG Audits	\$ 300.00
Vglobal Tech	8688	ADA Website Maintenance - July 2026	\$ 400.00

O&M - General Fund Expenses Total	\$ 908.86
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Asst. Secretary/Secretary

Asst. Treasurer

 7/14/2026



McClatchy Media

The Beaufort Gazette
The Belleville News-Democrat
Bellingham Herald
Centre Daily Times
Sun Herald
Idaho Statesman
Bradenton Herald
The Charlotte Observer
The State
Ledger-Enquirer

Durham | The Herald-Sun
Fort Worth Star-Telegram
The Fresno Bee
The Island Packet
The Kansas City Star
Lexington Herald-Leader
The Telegraph - Nacon
Merced Sun-Star
Miami Herald
El Nuevo Herald

The Modesto Bee
The Sun News | Myrtle Beach
Raleigh News & Observer
Rock Hill | The Herald
The Sacramento Bee
San Luis Obispo Tribune
Tacoma | The News Tribune
Tri-City Herald
The Wichita Eagle
The Olympian

Us Weekly
Woman's World
Special Interest Publications
UsMagazine.com
WomansWorld.com

Document No. 130842
Document Date 7/1/2026
Due Date Due upon Receipt
Account No. 47872

INVOICE AND STATEMENT OF ACCOUNT

Bill-to

UNIVERSITY PARK RECREATION DISTRICT
ATTN: ACCOUNTS PAYABLE
7671 THE PARK BOULEVARD
UNIVERSITY PARK
BRADENTON, FL 34201

Please remit payment to

McClatchy Company LLC
PO Box 510150
Livonia, MI 48151

[Click Here to Pay Online](#)

Questions? advertisingaccountsreceivables@mcclatchy.com
or visit us at mcclatchy.com/mars

Aging summary

0 - 30	31 - 60	61 - 90	91 - 120	121+	Cash on Account	Total Due
208.86	0.00	0.00	0.00	0.00	0.00	\$ 208.86

Invoices can be paid via the provided portal. The user name will be your email, and the password for your initial login is your account number. You will be prompted to create a custom password. For more details, visit <https://mcc.navigahub.com/portal/client/mcc/> Recent payments may not appear in the balance shown.

Balance Forward Amount: \$ 0.00

Invoice Date	Invoice No.	PO No.	Description	Amount	Sales Tax	Balance
6/30/2026	IN164449	4P29585	Campaign: 132128 - IPL0347589	99.25	0.00	99.25
Bradenton Herald	06/10/2026-06/10/2026		IPL0347589-0-	1		92.76
Service Fee	06/10/2026-06/10/2026		IPL0347589-0-	1		6.49
6/30/2026	IN164450	Special BOS 6.23.26	Campaign: 132564 - IPL0347953	109.61	0.00	109.61
Bradenton Herald	06/14/2026-06/14/2026		IPL0347953-0-	1		102.44
Service Fee	06/14/2026-06/14/2026		IPL0347953-0-	1		7.17

document no.	account no.	document date
130842	47872	7/1/2026

PAYMENT REMITTANCE

SEND PAYMENT TO

McClatchy Company LLC

PO Box 510150
Livonia, MI 48151

PAYMENT AMOUNT ENCLOSED

**REMEMBER: DETACH AND RETURN THIS PORTION
WITH REMITTANCE FOR PROPER CREDIT**

Please Return This Portion With Your Payment (Thank You)

McClatchy Company LLC
PO Box 510150
Livonia, MI 48151

ADVERTISING INVOICE

UNIVERSITY PARK RECREATION DISTRICT
ATTN: ACCOUNTS PAYABLE
7671 THE PARK BOULEVARD
UNIVERSITY PARK
BRADENTON, FL 34201

Document No: 130842
Account No: 47872
Account Name: UNIVERSITY PARK RECREATION
DISTRICT
Amount Due: \$ 208.86

Pay online or contact the AR Team at mcclatchy.com/mars

McClatchy Company LLC
PO Box 510150
Livonia, MI 48151

47872 0000 130842 20886

VGlobalTech

636 Fanning Drive
Winter Springs, FL 32708 US
contact@vglobaltech.com
www.vglobaltech.com



INVOICE

BILL TO

University Park RD
3501 Quadrangle Boulevard,
Suite 270, Orlando, FL 32817

INVOICE # 8688**DATE** 07/01/2026**DUE DATE** 07/16/2026**TERMS** Net 15

DATE	ACTIVITY	QTY	RATE	AMOUNT
	Web Maintenance:ADA Website Maintenance Ongoing website maintenance for ADA and WCAG Compliance	1	225.00	225.00
	Email:Email Hosting & Maintenance Monthly email hosting. Up to 5 emails customized as per need with website domain address. Up to maximum 2 GB (upgrade to 10 GB) storage per inbox. Backup and archival not included. Customers will be able to take their own local backup as needed. Customers also responsible to manage the inbox overflow by deleting unwanted emails, large attachments. Spam and virus filters included and will be configured. Email forwarding service (to any email of customer choice) included. Full access through browser from any device (tablets, mobile or desktop) provided including steps to setup the client.	5	15.00	75.00
	Email:Email Hosting, Inbox Management & Maintenance 10 additional Email setup, inbox setup and maintenance. Spam filters, virus checks, archival of emails. Support for clients	10	10.00	100.00

Please make check payable to VGlobalTech.

BALANCE DUE**\$400.00**

VGlobalTech

636 Fanning Drive
Winter Springs, FL 32708 US
contact@vglobaltech.com
www.vglobaltech.com



INVOICE

BILL TO

University Park RD
3501 Quadrangle Boulevard,
Suite 270, Orlando, FL 32817

INVOICE # 8645
DATE 06/30/2026
DUE DATE 06/30/2026
TERMS Due on receipt

DATE	ACTIVITY	QTY	RATE	AMOUNT
	Audits:Quarterly ADA & WCAG Audits Quarterly ADA & WCAG Audits for all new content and document conversions for the website.	1	300.00	300.00

Invoice for Quarter 2 ADA Audit.
Please make check payable to VGlobalTech.

BALANCE DUE **\$300.00**

Ways to pay



[View and pay](#)

University Park Recreation District

7/22/2026

Payment Authorization No. 166

O&M - General Fund Expenses

<u>Vendor</u>	<u>Invoice</u>	<u>Description</u>	<u>Amount</u>
Blalock Walters	40896-033-30	21 Million Bond Validation	\$ 6,615.70
Blalock Walters	40896-034-2	\$5 Million BAN	\$ 468.80
Blalock Walters	40896-000-94	General Representation through 6/30/2026	\$ 12,198.50
PFM	DM-07-2026-72	District Management Fee: July 2026	\$ 5,833.33

O&M - General Fund Expenses Total

\$ 25,116.33

Asst. Secretary/Secretary



Asst. Treasurer

7/22/2026



WE MAKE A DIFFERENCE

802 11th Street West Bradenton, Florida 34205
ph: 941.748.0100 fx: 941.745.2093

UNIVERSITY PARK RECREATION DISTRICT
PFM FINANCIAL ADVISORS, LLC
3501 QUADRANGLE BLVD, SUITE 270
ORLANDO, FL 32817

Page: 1
June 30, 2026
Account # 40896-033
Invoice # 40896-033-30

ATTN: ACCOUNTSPAYABLE@UNIVERSITYPARK-FL.COM

\$21 MILLION BOND VALIDATION

FEM

For Professional Services Rendered Thru 06/30/2026

			HOURS	
06/02/2026	MPB	Review Bob Gang memo on use of bond funds.	0.20	58.60
06/03/2026	FEM	Review docket for update on ruling; update Mark Barnebey.	0.30	87.90
	MPB	Telephone conference with Chair regarding possible settlement issues; Review status of court case.	0.50	146.50
06/04/2026	MPB	Review issues related to possible settlement; Conference call with Chair and litigation team.	1.10	322.30
06/05/2026	MPB	Work on settlement; Conference call with Dean Matt, the Chair and K. Hennessy; Conference with Fred Moore regarding settlement; Prepare memo to the Chair.	1.60	468.80
06/08/2026	MPB	Prepare for and attend Attorney-Client meeting; Review settlement discussion.	3.30	966.90
	JA	Email to Kwame Jackson regarding notice of shade meeting.	0.20	21.60
	FEM	Prepare for and attend shade meeting.	3.10	908.30
06/12/2026	JA	Email to Liberty Court Reporting regarding Shade meeting. review and respond to email from Liberty Court Reporting.	0.30	32.40
06/18/2026	MPB	Prepare update memorandum to Fred Moore.	0.30	87.90
		TOTAL FOR THE ABOVE SERVICES	10.90	3,101.20
06/03/2026		LIBERTY COURT REPORTING 40896.033-SHADE/CODE MEETING-UNIV PARK REC DIST/21 MIL BOND		845.00
06/24/2026		LIBERTY COURT REPORTING 40896.033-REPORTING/TRANSCRIPT-UNIV PARK REC DISTRICT		917.00
06/24/2026		LIBERTY COURT REPORTING 40896.033-REPORTING/TRANSCRIPT-UNIV PARK REC DISTRICT		997.50

UNIVERSITY PARK RECREATION DISTRICT
\$21 MILLION BOND VALIDATION
FEM

Page: 2
June 30, 2026
Account # 40896-033
Invoice # 40896-033-30

	TOTAL EXPENSES	2,759.50
06/30/2026	LIBERTY COURT REPORTING 40896.033 - REPORTING/TRANSCRIPT - UNIV PARK REC DISTRICT	755.00
	TOTAL ADVANCES	755.00
	TOTAL CURRENT WORK	6,615.70
	PREVIOUS BALANCE	\$12,264.40
	<u>PAYMENTS RECEIVED</u>	
06/15/2026	Payment received on account. Thank you!	-12,264.40
	AMOUNT DUE (includes Previous Balance if shown above)	<u>\$6,615.70</u>

If you prefer to receive paperless invoices by email, please complete the
information below or email billing@blalockwalters.com.

_____ Yes, I would prefer paperless billing by email.

Email Address for paperless billing purposes:

Please Provide Invoice Number With Payment to:
Blalock Walters P A 802 11th Street West Bradenton, FL 34205
Federal Tax ID # 59-1950976



WE MAKE A DIFFERENCE

802 11th Street West Bradenton, Florida 34205
ph: 941.748.0100 fx: 941.745.2093

UNIVERSITY PARK RECREATION DISTRICT
PFM FINANCIAL ADVISORS, LLC
3501 QUADRANGLE BLVD, SUITE 270
ORLANDO, FL 32817

Page: 1
June 30, 2026
Account # 40896-034
Invoice# 40896-034-2

ATTN: ACCOUNTSPAYABLE@UNIVERSITYPARK-FL.COM

\$5,000,000 BOND ANTICIPATION NOTE (BAN)

MPB

For Professional Services Rendered Thru 06/30/2026

			HOURS	
06/05/2026	MJP	Review communication from Attorney Barnebey summarizing call with Dean Matt and his attorney; review shade meeting agenda.	0.20	58.60
	MPB	Attend Teams meeting with the Chair, Kevin Hennessy and Dean Matt; prepare memo to the Chair regarding discussion points.	1.40	410.20
		TOTAL FOR THE ABOVE SERVICES	1.60	468.80
		TOTAL CURRENT WORK		468.80
		AMOUNT DUE (includes Previous Balance if shown above)		<u>\$468.80</u>

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Blalock Walters P A 802 11th Street West Bradenton, FL 34205
Federal Tax ID # 59-1950976



WE MAKE A DIFFERENCE

802 11th Street West Bradenton, Florida 34205
ph: 941.748.0100 fx: 941.745.2093

UNIVERSITY PARK RECREATION DISTRICT
PFM FINANCIAL ADVISORS, LLC
3501 QUADRANGLE BLVD, SUITE 270
ORLANDO, FL 32817

Page: 1
June 30, 2026
Account # 40896-000
Invoice# 40896-000-94

ATTN: ACCOUNTSPAYABLE@UNIVERSITYPARK-FL.COM

GENERAL REPRESENTATION

MPB

For Professional Services Rendered Thru 06/30/2026

			HOURS	
06/01/2026	MPB	Telephone conference with Telese Zuberer on changes to PBM; Review letter from Telese Zuberer; Prepare memo to the Board on changes to PBM.	1.40	373.80
02/2026	MJP	Attend Board of Supervisors meeting.	3.90	1,041.30
	MJP	Review communication from Attorney Barnebey recapping conversation with Attorney Zuberer relating to UPCA/PFM.	0.20	53.40
	MPB	Review and respond to Chair memo; Prepare for and attend Board meeting.	3.70	987.90
06/04/2026	MJP	Conference with Attorney Barnebey to discuss RFP.	0.20	53.40
	MJP	Review of various matters relating to RFP, audit, Town Hall, budget, bond, governance committee, capital improvements, and PBM.	1.80	480.60
	MJP	Prepare for meeting with Chair; participate in meeting with Chair; conference with Attorney Barnebey to discuss.	1.30	347.10
	MPB	Telephone conference with Ethics Commission staff; Review and respond to John Fetsick memo regarding possible change to the PBM operating agreement; Telephone conference with Vivian Carvalho; Review and respond to Michael Dennis memo.	0.80	213.60
06/08/2026	MJP	Review Sarasota Premier revised offer letter; revise addendum; prepare communication to Sydney Johnson.	0.30	80.10
	MPB	Prepare memo to the Board regarding PBM Operating Agreement.	0.20	53.40
	RDP	review chapters 189/141 florida statutes and begin case law research regarding raising capital fees for special assessment reimbursement	0.70	165.20
	RDP	continue case law research regarding raising capital fees for special assessment reimbursement	0.60	141.60
06/09/2026	MPB	Review draft Town Hall meeting opening comments.	0.40	106.80
	RDP	continue case law research regarding raising capital fees for special assessment reimbursement	1.40	330.40

UNIVERSITY PARK RECREATION DISTRICT
GENERAL REPRESENTATION
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			HOURS	
06/11/2026	MJP	Review of issue relating to special assessment for interest only.	0.20	53.40
	MPB	Review statutes and case law on issues related to assessment. Prepare memorandum to Chair on possible assessments.	1.40	373.80
06/15/2026	MJP	Review communication from Michael Dennis regarding RFP.	0.20	53.40
	MJP	Review communication from Paul Fey regarding RFP; prepare communication to Attorney Barnebey.	0.20	53.40
	MJP	Review communication from Kwame Jackson regarding committees.	0.20	53.40
	MPB	Telephone call with Vivian Carvalho and Kwame Jackson.	0.40	106.80
06/16/2026	MJP	Attend agenda call; conference with Attorney Barnebey to discuss agenda matters.	1.40	373.80
	MJP	Review of issue relating to Mutual Cooperation Agreement rights and obligations.	0.40	106.80
	MPB	Telephone call with John Fetsick. Attend agenda preparation meeting. Prepare draft resolution 2026-016; revise the Governance Committee Charter. Prepare memorandum to Vivian Carvalho and Kwame Jackson regarding Resolution 2026-16. Prepare memorandum to Vivian Carvalho and Kwame Jackson on Governance Committee.	4.20	1,121.40
	JA	Work on Ordinance 2026-16.	0.40	53.60
06/17/2026	MJP	Review and respond to John Fetsick regarding RFP.	0.20	53.40
	MJP	Review follow up communication from Michael Dennis regarding RFP.	0.20	53.40
06/18/2026	MPB	Review and respond to Scott Huebner memorandum.	0.40	106.80
06/21/2026	MPB	Prepare memorandum to the Board. Review Greg Selep's memorandum. Prepare memorandum to Vivian Carvalho.	1.70	453.90
06/22/2026	MJP	Review summary of UPCA revisions to Operating Agreement to the Board; review communication from Greg Selep regarding the same.	0.20	53.40
	MJP	Call with Mark Barnebey to discuss 6/23 meeting.	0.20	53.40
	MJP	Review communication from John Fetsick regarding PBM.	0.20	53.40
	MJP	Review communications by and between Chair and Attorney Barnebey regarding PBM/UPCAI.	0.20	53.40
	MJP	Review communication from Dean Matt regarding SCS meeting.	0.20	53.40
	MJP	Review updated and final agenda for 6/23 meeting.	0.20	53.40
	MJP	Review communications by and between Chair and Attorney Barnebey regarding Resolution for seat terms.	0.20	53.40
	MPB	Review Greg Selep memo; Prepare memo to the Board of Supervisors regarding PBM changes; Review draft Banking RFP; Review and respond to memos from the Chair on PBM changes; Prepare memo to Michael Dennis on the RFP for Banking services; Review and respond to John Fetsick memo on the temporary construction easement.	2.50	667.50
06/23/2026	MJP	Review various emails from Greg Selep, Scott Huebner, Chair, Kwame Jackson, and Attorney Barnebey relating to 6/23 agenda matters; prepare for meeting; conference with Attorney Barnebey.	1.20	320.40
	MJP	Attend Board of Supervisors meeting.	2.20	587.40

UNIVERSITY PARK RECREATION DISTRICT
GENERAL REPRESENTATION
MPB

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June 30, 2026
Account # 40896-000
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			HOURS	
	MJP	Prepare draft Notice of Intent to Negotiation to Attorney Zubrerer regarding revisions to UPCA's Operating Agreement.	0.60	160.20
	MJP	Review Steve Ludmerer comments to Board regarding 6/23 meeting.	0.20	53.40
	MJP	Call with Attorney Barnebey regarding 6/23 meeting summary.	0.20	53.40
	MPB	Telephone conference with Chair regarding PBM.	0.30	80.10
06/24/2026	MJP	Finalize letter to UPCA regarding Notice of Intent to Negotiate.	0.70	186.90
	MPB	Review draft letter of Intent to Negotiate.	0.30	80.10
06/25/2026	MPB	Telephone conference with Vivian Carvalho; Telephone conference with Steve Heitzner regarding PBM.	0.30	80.10
06/26/2026	MJP	Review and respond to various communications from Attorney Zuberer regarding UPCA revisions to operating agreement.	0.40	106.80
	MJP	Review and respond to Chair email regarding solicitation of contracts.	0.20	53.40
	MJP	Prepare communication to Chair regarding Attorney Zuberer's request for call relating to UPCA changes to operating agreement.	0.20	53.40
	MJP	Review communications by and between Vivian Carvalho and Janette Gatesy regarding UPCA attendance at District meeting.	0.20	53.40
	MJP	Attend conference with Attorney Barnebey and Attorney Zuberer regarding UPCA/District.	0.80	213.60
	MJP	Call with Chair, Attorney Barnebey, and Vivian Carvalho regarding 6/30 meeting; prepare communication to Attorney Zuberer regarding 6/30 meeting.	0.50	133.50
06/28/2026	MPB	Review requirements of the MCA, the PBM Agreement and the District Rules.	1.40	373.80
06/29/2026	MJP	Call with Attorney Barnebey to discuss PBM contract.	0.20	53.40
	MJP	Review and respond to Telese Zuberer regarding 7/17 meeting and proposed meeting on 7/15.	0.30	80.10
	MJP	Review communications by and between John Fetsick and Attorney Barnebey regarding 6/30 meeting.	0.20	53.40
	MPB	Review and respond to John Fetsick memo; Review and respond to Chair; Prepare for meeting on 6/30.	0.50	133.50
06/30/2026	MJP	Conference with Attorney Barnebey regarding 6/30 meeting.	0.20	53.40
	MJP	Read various communications between Chair and Attorney Barnebey regarding PBM contract.	0.40	106.80
	MJP	Prepare for 6/30 Board of Supervisors meeting; attend meeting.	2.20	587.40
	MPB	Review options related to PBM contract.	0.20	53.40
		TOTAL FOR THE ABOVE SERVICES	46.20	12,198.50
		TOTAL CURRENT WORK		12,198.50
		PREVIOUS BALANCE		\$21,015.78
<u>PAYMENTS RECEIVED</u>				
06/08/2026		Payment received on account. Thank you!		-9,954.98
06/15/2026		Payment received on account. Thank you!		-11,060.80

UNIVERSITY PARK RECREATION DISTRICT
GENERAL REPRESENTATION
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TOTAL PAYMENTS	<u>-21,015.78</u>
AMOUNT DUE (includes Previous Balance if shown above)	<u>\$12,198.50</u>

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Date	Invoice Number
July 6, 2026	DM-07-2026-72
Payment Terms	Due Date
Upon Receipt	July 6, 2026

Bill To:

University Park Recreation District
c/o PFM Management Services District Accounting
Dept.
3501 Quadrangle Blvd., Suite 270
Orlando, FL 32817
United States of America

Company Address:

PO Box 69751
Baltimore, MD 21264-9751
+1 (215) 5676100

Remittance Options:**Via Mail:**

PFM Management Services LLC
PO Box 69751
Baltimore, MD 21264-9751
United States of America

RE: District Management Fee: July 2026

Professional Fees

\$5,833.33

Total Amount Due

\$5,833.33