

University Park Recreation District

3501 Quadrangle Blvd., Suite 270, Orlando, FL 32817

Phone: 407-723-5900 Fax: 407-723-5901

<http://universityparkrd.com/>

The Special Meeting of the **Board of Supervisors of the University Park Recreation District** will be held on **Tuesday, July 28, 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 (2:00-2:10PM)

- 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 (2:10-2:20PM)

1. Open Remarks Chairperson
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
 - a. Management Discussion & Analysis Report
7. Committee Reports
 - a. Finance
 - b. Strategic Planning

New Business Matters..... (2:30-2:50PM)

8. Consideration of Proposals for General Manager/Chief Operating Officer Search
 - a. Overview of General Manager Role
 - b. Kopplin Kuebler & Wallace
 - c. Strategic Club Solutions
9. Consideration of Revision to Ameris Bank Account Signers
10. Nominations / Appointment of Strategic Planning Committee Member

Old Business Matters..... (2:50-2:55PM)

11. Consideration of **Resolution 2026-19, Assigning Current Members of the Finance Committee to Designated Seats**

Date	Meeting Type	Time	Location
August 4, 2026	Special Board of Supervisors' Meeting & Attorney/Client Session	9:00 AM	Laurie Evans Conference Room
August 4, 2026	Special Board of Supervisors Meeting	2:00 PM	University Park Business Offices
August 11, 2026	Board of Supervisors' Rescheduled Meeting	2:00 PM	University Park Business Offices
August 24, 2026	Special Board of Supervisors' Meeting	2:00 PM	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

12. Supervisor Comments & Future Agenda Items(2:55-3:00PM)

Adjournment



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	7.28.26
607	Total of Files Released	7.28.26



University Park Recreation District

Correspondence Summary List

Correspondence Summary List (as of 7/28/2026)

Name	Date Received	Topic
Dean Matt	7/2/2026	Important information from PBM Board
Richard Carroll	7/13/2026	Moving Forward
Dean Matt	7/16/2026	Re: On the subject of Special benefits
Dean Matt	7/16/2026	Greenberg Traurig proposed invoice
Dean Matt	7/16/2026	Strat Planning meeting comment
Dean Matt	7/17/2026	Re: Greenberg Traurig proposed invoice
Elaine Kulbako	7/22/2026	Resignations
Wolfgang Armbruster	7/22/2026	BAN (2024 Note) Question
Dale Otterman	7/26/2026	Communications



University Park Recreation District

Management Discussion & Analysis Report

University Park Recreation District
Management Discussion & Analysis Report
As of June 30, 2026

Member Experience/Dining

Given the time of year our attendance at dining activities remained solid.

June events and activities included: Pasta Buffet (6/10), Bingo (6/11), Wine Dinner (6/16), Trivia (6/18), Father's Day Brunch (6/21), Prime Rib Night (6/24), 9 Dine & Wine (6/28). We served over 1,000 members and guests at these events in addition to our regular dining.

F&B financial results through June 2026 are \$105k favorable to budget.

Thank you to the Team for this tremendous effort!

Golf Operations

Golf Revenue is currently \$245k favorable to budget through June. While merchandise sales have slowed, they remain in line with the June budget and continue to be favorable for the fiscal year overall.

Summer slowdown is in full swing, no pun intended, but we are still seeing anywhere from 100 to 180 players per day. Staffing levels have been adjusted and are at good levels for this time of year.

Racquets Operations

Racquets, like the golf course and dining operations, were also busy with high participation!

During our regular season we hosted more than 30 events, all of which reached full capacity. Since our May "Cinco-De-Mayo" event we hosted a "First Friday" for both Tennis and Pickleball", in addition to Tropical Paradise summer Pickleball and tennis events. We added an advanced plus pickleball program which has attracted a higher level of player base to UPCC.

Wellness & Fitness

Overall usage across group fitness, personal training, and the gym has declined since May as our snowbirds have departed and full-time residents travel. Lower facility volume has encouraged a steady flow of new and returning local members, taking advantage of increased class and fitness equipment availability.

Our team consists of 5 personal trainers and 3 group fitness instructors, and 2 trainers are already fully booked for the upcoming September – May season.

UNIVERSITY PARK COUNTRY CLUB STATEMENT OF OPERATIONS

YTD OPERATING RESULTS, 9 MONTHS THROUGH 6/30/26	Actual Results of UPCC Operations	Budget	\$ Variance	% Change	COMMENTS
Total Revenues	\$11,576	\$11,287	\$289	2.6%	
Less: Outside Golf Capital Allocation	(244)	(220)	(23)	10.6%	10% of Outside Golf Allocated to Capital
Total Revenues, Less Capital Allocation	11,332	11,067	266	2.4%	
Total Expenses	10,124	10,181	57	0.6%	
Net Operating Surplus (Deficit)	1,208	886	322	36.4%	Net Operating impact
Revenues and Expenses, Details	Actual	Budget	\$ Variance	% Change	
Dues revenue	\$4,898	\$4,964	(\$ 66)	(1.3%)	
Golf operations revenue	3,453	3,202	251	7.8%	Outside rounds exceeded the budget by 1,916 rounds. Merchandise sales \$57K favorable to budget.
Dining operations revenue	2,731	2,716	15	0.6%	
Racquets/Fitness/Other operations revenue	251	185	65	35.3%	
Subtotal, Revenues	11,332	11,067	266	2.4%	
Golf operations	1,459	1,431	(29)	(2.0%)	
Golf maintenance	2,725	2,675	(50)	(1.9%)	Projects that were budgeted for later in the year completed early
Dining operations	3,488	3,578	90	2.5%	Food COGS 65k, Linens 29k, waste and supplies
Racquets & Fitness operations	545	503	(43)	(8.5%)	
General & Adm	1,906	1,995	89	4.4%	Payroll 68k, Insurance 15k, CC Fees 15k
Subtotal, Expenses	10,124	10,181	57	0.6%	
Net Operating Surplus (Deficit), net of \$244k outside golf capital allocation	\$1,208	\$ 886	\$ 322	36.4%	Variance is \$322k, 36.4% from budget

UNIVERSITY PARK COUNTRY CLUB COMPARATIVE BALANCE SHEET AS OF JUNE 30, 2026 AND 2025

Assets	UPCC Operating Fund		Capital Irrigation Fund		Comments & Assumptions
	Unaudited 6/30/26	Unaudited 6/30/25	Unaudited 6/30/26	Unaudited 6/30/25	
Operating Cash & Short-Term Investments	\$3,327	\$2,375			
Accounts Receivable	527	390			
Inventory	302	329			
Deposits & Prepaids	470	336			
Future Assessments based on BAN or Long-Term Bonds					FY26 - Prepaid Insurance & Prepaid Cart Lease, software, sales tax etc. Amounts drawn from BAN, \$4,140 + 65k Accrued Interest + Amounts borrowed from UPCC Capital Reserves, \$1,835
Subtotal, operating assets	4,626	3,430	6,040	5,826	
Board Designated Cash & Investments & Receivable from Irrigation Fund:					
Operating Reserves	400	400			BOS designated for future use.
Capital Reserves & Short-Term Investments	1,477	871			
Capital Reserves Used for Irrigation Project--Due from Capital Irrigation Fund	1,835	1,835			Portion of irrigation project paid out of UPCC reserve funds
Sub total, Board Designated Cash, Capital Reserves & Capital Irrigation Fund Receivable	3,712	3,106	-	-	
Property and Equipment - Net	26,371	25,087			
Property and Equipment - CIP	414	684	-	-	
Total Assets	\$35,123	\$32,306	\$6,040	\$5,826	
Liabilities & Net Position:					
Accounts Payable					
Operations Related	\$321	\$226			
Accrued Liabilities & Other Payables	305	256	65	-	
Gift Cards & Store Credits	135	121			
Subtotal, operating liabilities	761	604	65	-	
Deferred Revenue	3,142	2,928			
Capital Lease Obligations	2,009	418			New cart lease and GCM Equipment
Capital Projects Payable	14	177			
Due to UPCC Operating Fund			\$1,835	\$1,835	
BAN Payable to Bank			4,140	3,991	
Total Liabilities	5,926	4,127	6,040	5,826	
Beginning Balance, Purchase of UPCC assets in 2019	16,750	16,750	-	-	
Due From Capital Irrigation Fund	1,835	1,835			
Prior Years' Operating Surplus	9,868	7,281			
Current Period Non-Operating Surplus (Deficit)	-464	1,639			
Current Period Operating Surplus	1,208	675			
Net Position	29,197	28,180	-	-	
Total Liabilities & Net Position	\$35,123	\$32,306	\$6,040	\$5,826	

UNIVERSITY PARK COUNTRY CLUB CAPITAL SOURCES AND USES AS OF JUNE 30, 2026

Sources		Notes
2019, Construction Fund after UPCC club purchase	\$4,157	
2021, Loan Forgiveness	856	
2024-5, Bond Anticipation Note for Irrigation Project		\$1,835 was paid out of Operating Cash and needs to be repaid from either BAN assessment or 2024 Bond funds when available.
	3,757	
Sub total, Bond Proceeds and Loan Forgiveness	8,769	Bonds & Loan Forgiveness
FY 2021 -2025 Initiation Fees	3,554	
FY 2021-2025 10% Outside Golf	1,530	
FY 2023-2025 Capital Dues	872	
FY 2026 Interest on Investments	13	
FY 2026 Initiation Fees	890	
FY 2026 10% Outside Golf	244	
FY 2026 Capital Dues	413	
Sub total, Init Fees, Capital Dues & 10% Outside Golf	7,516	Capital raised through Operations
Total Sources of Capital	16,286	
Uses		
2022, Parking Lot - Asphalt	136	
2021-2025, Golf Course Improvement & Irrigation	7,412	
2023, Tennis/Pickleball Courts	810	
2022-2023, Buildings - Renovations, A/C and Upgrades	291	
2023-2025, Range Picker, Bag Drop/Pro Shop FF&E	123	
2022-2024, Grille - Kitchen Equipment	289	
2023, Golf Course Maintenance Equipment	459	
2023, IT Equipment - Computers, Server etc	91	
2023-2024, Racquets And Fitness Equipmet	89	
2021-2023, Indoor Dining Renovation	1,066	
2023-2024, Outdoor Dining (Cafe) Renovation	2,326	
Subtotal, Uses	13,092	
FY2026 Uses		
2026, Golf Course Maintenance Equipment	36	
2026, Back 9 Renovation	1,164	
2026, Buildings, Varsity Club, Admin & Locker Room Renovation, Cart Barn Garage Doors	87	
2026, Golf Club Rentals	12	
2026, Grille - Kitchen Equipment	26	
2026, Admin Furniture	3	
2026, Security Cameras	13	
Subtotal, FY2026 Uses	1,341	
Construction In Progress		
2020, Master Plan Project	182	
Front 9 Project	202	
Boardwalk Project	4	
Subtotal, CIP	389	
Total Uses	14,822	
Remaining Capital Reserves	1,464	Capital Account Balance at 6/30/2026
Due to operating capital from BAN or Bond	1,835	
Total Capital Reserves	3,299	Balance with Irrigation Project repayment

MTD & YTD STATEMENT OF CASH FLOWS, 9 MONTHS THROUGH 6/30/26		
	June	
	MTD	YTD
Cash Flows From Operating Activities:		
Cash Receipts From Members & Guests	\$ 716	\$ 12,886
Cash Payments To Vendors & Suppliers	(427)	(5,043)
Cash Payments To PBM Staff Serving UPCC & UPRD	(543)	(5,501)
Net Cash Provided (Used) By Operating Activities	(255)	2,342
Cash Flows From Capital, Financing, And Other Non-Operating Activities:		
Initiation Fees	\$ 32	\$ 898
Capital Dues	11	413
Purchase Of Equipment & Capital Projects	(150)	(620)
FEMA Proceeds	-	8
Transfer to General Fund		(237)
Interest From Investments	9	23
Net Cash Provided (Used) By Capital And Other Non-Operating Activities	(98)	485
Net Increase (Decrease) In Cash	(352)	2,827
Cash At Beginning Of Period	5,557	2,377
Cash At End Of Period	\$ 5,204	\$ 5,204

University Park Recreation District
FY2026 General Fund Actual & Budget

	Actual Through 06/30/2026	Anticipated Jul. - Sept.	Anticipated FY 2026 Total	FY 2026 Adopted Budget
<u>Revenues</u>				
PrYr Surplus	-	-	-	9,088
Inter-Fund Transfers - Debt Service to O&M	75,486	-	75,486	70,000
Inter-Fund Transfers - Country Club to O&M	237,412	35,587	272,999	220,912
	\$312,898	\$35,587	\$348,485	\$300,000
<u>General & Administrative Expenses</u>				
Assessment Administration	10,000	-	10,000	10,000
Audit	36,392	-	36,392	35,000
Bank Fees	140	20	160	500
Bond Administration Fee	6,687	-	6,687	7,500
Contingency	540	180	720	15,000
Dissemination Agent	5,000	-	5,000	5,000
District Counsel	133,358	39,000	172,358	110,000
Dues, Licenses, and Fees	1,075	-	1,075	2,500
Election Costs	10,621	-	10,621	10,000
Insurance	21,569	-	21,569	17,500
Legal Advertising	6,776	900	7,676	5,000
Management	52,500	17,500	70,000	70,000
Meeting Set Up	-	-	-	5,000
Office Supplies	-	-	-	1,000
Postage & Shipping	128	100	228	1,000
Professional Services, Other	-	-	-	-
Travel and Per Diem	-	-	-	-
Web Site Maintenance	4,500	1,500	6,000	5,000
Total General & Administrative Expenses	\$289,285	\$59,200	\$348,485	\$300,000

UNIVERSITY PARK COUNTRY CLUB
KEY PERFORMANCE INDICATORS
FY 2025 Q3 FY 2026

[illegible]



University Park Recreation District

Consideration of Proposals for General Manager/Chief Operating Officer 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)

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PEOPLE FOCUSED, QUALITY DRIVEN

250+

club visits per year



1000+

successful placements

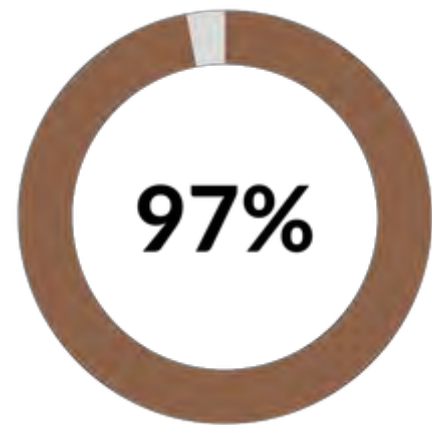
Working with us, you can expect an experience that will be centered around the well-being of our clients, the candidates we place, and the industry as a whole. Our process has been perfected since 1996 and involves merging more than 500 years of combined expertise with a comprehensive understanding of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

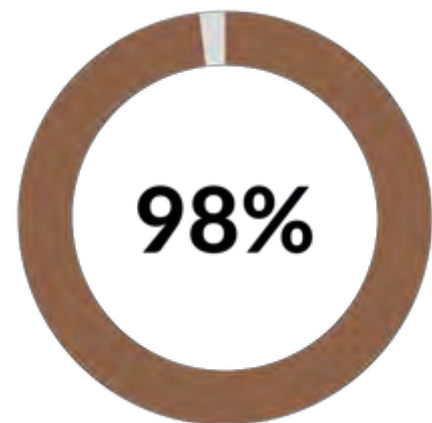


SATISFACTION RATING



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.



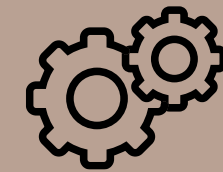
EDUCATION & TRAINING

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

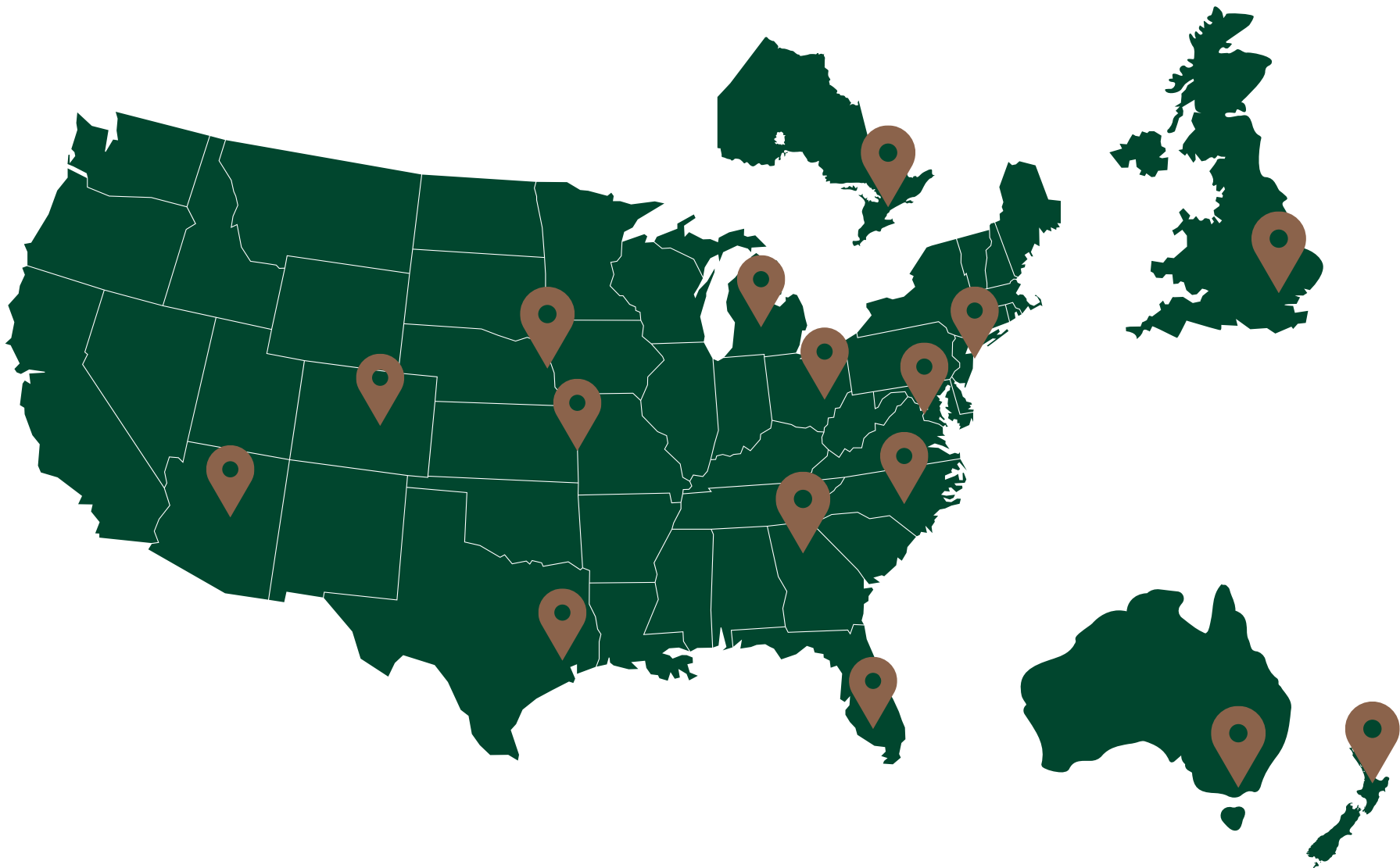


THOMAS B. WALLACE III, CCM, CCE, ECM

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 WHITTLE, 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.

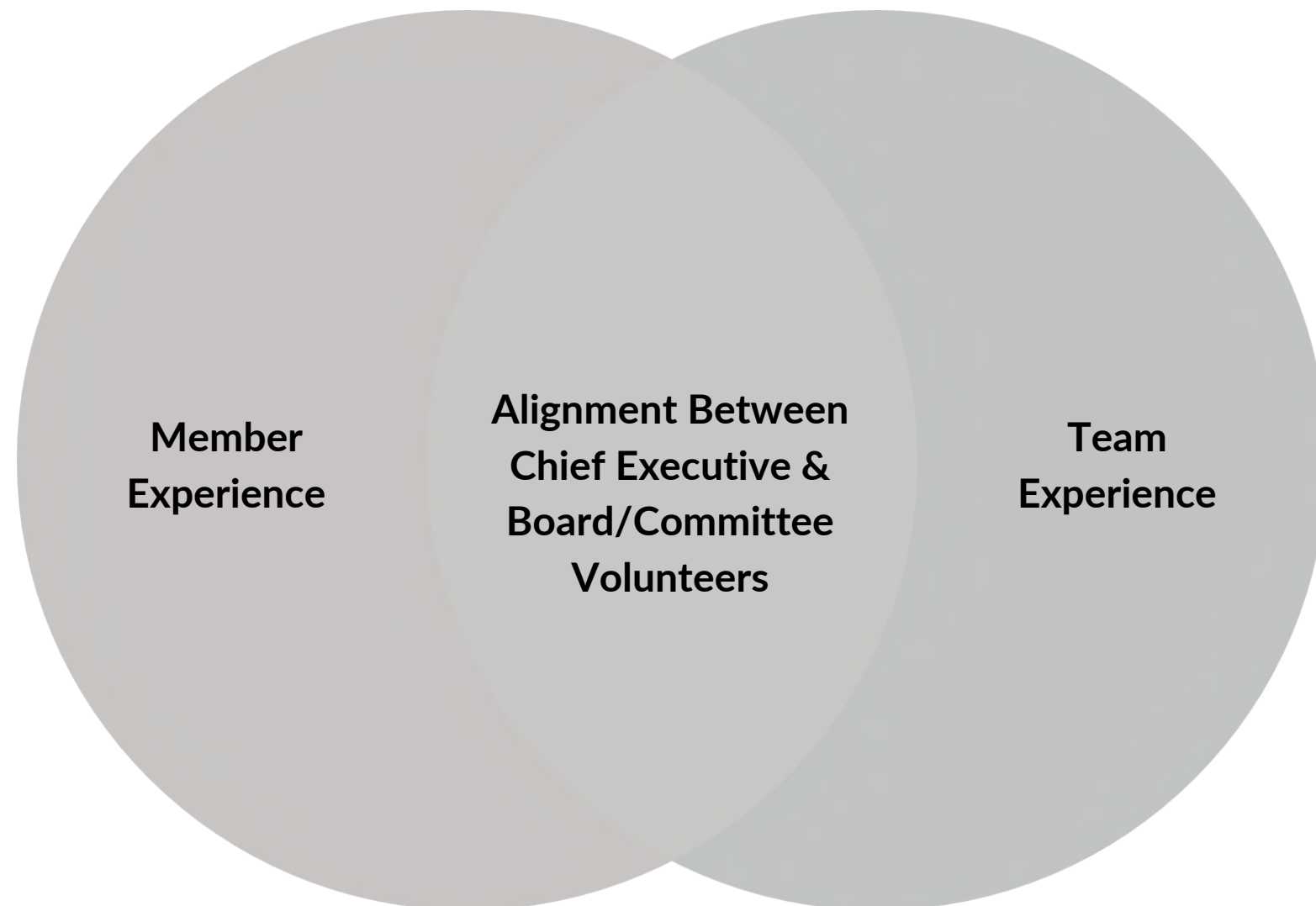
We invest time contributing expertise to several external informational resources like podcasts, webinars, and publications.

☑ 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.

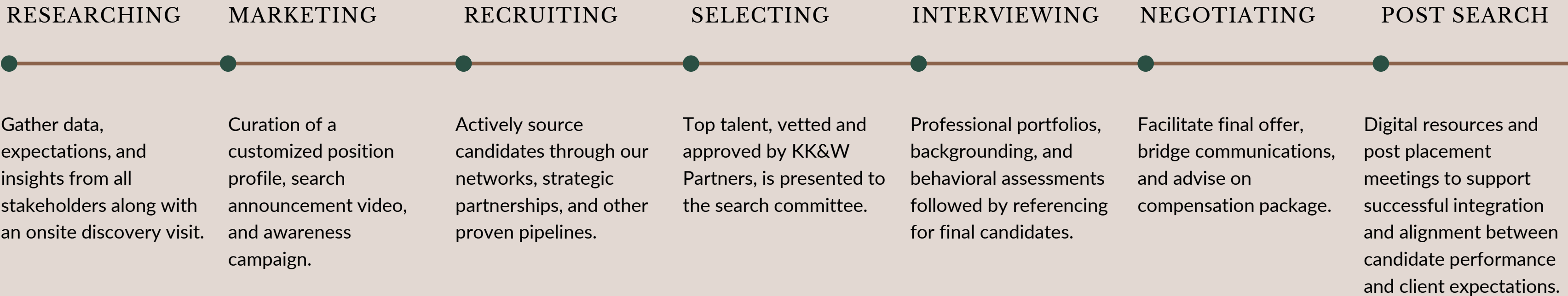
OUR GUARANTEE

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 KUEBER & 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
Addison Reserve Country Club | Delray Beach, FL
American Club Hong Kong | Hong Kong, China
American Yacht Club | Rye, NY
Annapolis Yacht Club | Annapolis, MD
Atlanta Athletic Club | Johns Creek, GA
Augusta Country Club | Augusta, GA
Augusta National Golf Club | Augusta, GA
Badminton and Racquet Club of Toronto | Ontario, Canada
Bakers Bay Golf & Ocean Club | The Bahamas
Baltimore Country Club | Baltimore, MD
Baltusrol Golf Club | Springfield, NJ
Beach Point Club | Mamaroneck, NY
Bel-Air Bay Club | Pacific Palisades, CA
Belfair Property Owners’ Association | Bluffton, SC
Belle Meade Country Club | Nashville, TN
Berkeley Hall Club | Bluffton, SC
Big Canyon Country Club | Newport Beach, CA
Biltmore Forest Country Club | Asheville, NC
Blowing Rock Country Club | Blowing Rock, NC
Blue Ridge Mountain Club POA | Blowing Rock, NC
Boca West Country Club | Boca Raton, FL
Bohemian Club | San Francisco, CA
Bonita Bay Club | Bonita Springs, FL
Boston Golf Club | Hingham, MA
Brae Burn Country Club | Purchase, NY
Broken Sound Club | Boca Raton, FL
Brook Hollow Golf Club | Dallas, TX
Capilano Golf and Country Club | Vancouver, BC
Carmel Country Club | Charlotte, NC
Castle Pines Golf Club | Castle Rock, CO
Cat Cay Yacht Club | Bimini Islands, Bahamas
Charlotte Country Club | Charlotte, NC
Cherokee Country Club | Knoxville, TN
Cherokee Town & Country Club | Atlanta, GA
Cherokee Plantation | Yemassee, SC
Chevy Chase Club | Chevy Chase, MD
Chileno Bay Golf & Beach Club |Cabo San Lucas, MX

Club Pelican Bay | Naples, FL
Colleton River Club | Bluffton, SC
Collier’s Reserve Country Club | Naples, FL
Colonial Country Club | Fort Worth, TX
Congressional Country Club | Bethesda, MD
Cosmos Club | Washington, D.C.
Country Club of Buffalo | Williamsville, NY
Country Club of Rochester | Rochester, NY
Cove Club | Cabo San Lucas, Mexico
Congressional Country Club | Bethesda, MD
Cosmos Club | Washington, D.C.
Country Club of Buffalo | Williamsville, NY
Country Club of Rochester | Rochester, NY
Dallas National Golf Club | Dallas, TX
Dallas Petroleum Club | Dallas, TX
Denver Country Club| Denver, CO
Des Moines Golf & Country Club | Des Moines, IA
Desert Highlands Association | Scottsdale, AZ
Desert Mountain Club | Scottsdale, AZ
Detroit Golf Club | Detroit, MI
Dorado Beach | Puerto Rico
Dunes Golf & Beach Club | Myrtle Beach, FL
East Lake Golf Club | Atlanta, GA
El Dorado Golf & Beach Club | San Jose del Cabo, Mexico
Eldorado Country Club | Indian Wells, CA
Estancia Club | Scottsdale, AZ
Exmoor Country Club | Highland Park, IL
Farmington Country Club | Charlottesville, VA
Fiddlesticks Country Club | Fort Myers, FL
Fisher Island Club | Fisher Island, FL
Frenchman’s Creek Golf & Beach Club | Palm Beach Gardens, FL
Fresh Meadow Country Club | Lake Success, NY
Glen Oak Country Club | Glen Ellyn, IL
Glen View Club | Golf, IL
Golf Club of Avon | Avon, CT
Governors Club | Chapel Hill, NC
Greenwich Country Club | Greenwich, CT
Grey Oaks | Naples, FL

Grosse Pointe Yacht Club | Grosse Pointe Shores, MI
Haig Point | Daufuskie Island, SC
Hideaway Golf Club | La Quinta, CA
High Hampton | Cashiers, NC
Hobe Sound Golf Club | Hobe Sound, FL
Hudson National Golf Club | Croton-on-Hudson, NY
Hunters Run Country Club | Boynton Beach, FL
Hyannisport Club | Hyannis Port, MA
Idle Hour Club | Macon, GA
Interlachen Country Club | Edina, MN
John’s Island Club | Indian River Shores, FL
Jupiter Hills Club | Tequesta, FL
Jupiter Island Club | Hobe Sound, FL
Kansas City Country Club | Mission Hills, KS
Kiawah Island Community Association | Johns Island, SC
Lakeside Country Club | Houston, TX
Lancaster Country Club | Lancaster, PA
Lost Tree Club | North Palm Beach, FL
Marrakesh Country Club & Community | Palm Desert, CA
Martis Camp Club | Truckee, CA
Maui Country Club | Paia, HI
Meadow Club | Fairfax, CA
Medinah Country Club | Medinah, IL
Mediterra Community Association | Naples, FL
Menlo Country Club | Woodside, CA
Merion Golf Club | Ardmore, PA
Monterey Peninsula Country Club | Pebble Beach, CA
Multnomah Athletic Club | Portland, OR
Myers Park Country Club | Charlotte, NC
Myopia Hunt Club | Hamilton, MA
Nanea | Kailua-Kona, HI
NCR Country Club | Dayton, OH
Oakland Hills Country Club | Bloomfield Hills, MI
Oakmont Country Club | Pittsburgh, PA
Ocean Forest Golf Club | Sea Island, GA
Ohoopee Match Club | Cobbtown, GA
Old Palm Golf Club | Palm Beach Gardens, FL
Old Sandwich Golf Club | Plymouth, MA

Old Westbury Golf & Country Club | Old Westbury, NY
Paradise Valley Country Club | Paradise Valley, AZ
Philadelphia Country Club | Philadelphia, PA
Pine Tree Golf Club | Boynton Beach, FL
Piping Rock Club | Locust Valley, NY
Port Royal Club | Naples, FL
Quail Ridge Country Club | Boynton Beach, FL
Quail West Golf & Country Club | Naples, FL
Roaring Gap Club | Roaring Gap, NC
Rolling Rock Club | Ligonier, PA
Round Hill Club | Greenwich, CT
Royal Auckland and Grange Golf Club | Auckland, NZ
Royal Oaks Country Club | Houston, TX
Royal Palm Yacht & Country Club | Boca Raton, FL
Sailfish Point | Hutchinson Island, FL
San Francisco Yacht Club | Belvedere, CA
Sarasota Yacht Club | Sarasota, FL
Saucon Valley Country Club | Bethlehem, PA
Sawgrass Country Club | Ponte Verde Beach, FL
Scioto Country Club | Columbus, OH
Seabrook Island Club | Seabrook Island, SC
Shady Canyon Golf Club | Irvine, CA
Shorehaven Golf Club | Norwalk, CT
Skokie Country Club | Glencoe, IL
Snowmass Club | Snowmass Village, CO
Southern Hills Country Club | Tulsa, OK
St. Andrews Country Club | Boca Raton, FL
St Andrews Links Trust | St Andrews, Scotland
St. Francis Yacht Club | San Francisco, CA
St. George’s Golf & Country Club | Etobicoke, Ontario
The Apawamis Club | Rye, NY
The Bridges at Rancho Santa Fe | Rancho Santa Fe, CA
The Century Association | New York, NY
The Chicago Club | Chicago, IL
The Club at Las Campanas | Santa Fe, NM
The Club at Morningside | Rancho Mirage, CA
The Club at Quail Ridge | Boynton Beach, FL
The Country Club | Pepper Pike, OH

The Country Club of Virginia | Richmond, VA
The Ford Field & River Club | Richmond Hill, GA
The Forest Country Club | Fort Myers, FL
The Honors Course | Chattanooga, TN
The Kittansett Club | Marion, MA
The Landings Club | Savannah, GA
The Los Angeles Country Club | Los Angeles, CA
The Loxahatchee Club | Jupiter, FL
The Olympic Club | San Francisco, CA
The Point | Saranac Lake, NY
The Quarry at La Quinta | La Quinta, CA
The Quechee Club | Quechee, VT
The Reserve | Indian Wells, CA
The Santaluz Club | San Diego, CA
The Tryall Club | Montego Bay, Jamaica
The University Club of Washington D.C. | Washington D.C.
The Yale Club of New York City | New York, NY
Thunderbird Country Club | Rancho Mirage, CA
The Toronto Lawn Tennis Club | Ontario, Canada
TPC Sawgrass | Ponte Vedra Beach, FL
Tradition Golf Club | La Quinta, CA
Trout National - The Reserve | Vineland, NJ
Union Club of the City of New York | New York, NY
University Club of Chicago | Chicago, IL
Wade Hampton Golf Club | Cashiers, NC
Waialae Country Club | Honolulu, HI
Washington Golf & Country Club | Arlington, VA
Waverley Country Club | Portland, OR
Wee Burn Country Club | Darien, CT
Westchester Country Club | Rye, NY
West Side Tennis Club | Forest Hills, NY
Wianno Club | Osterville, MA
Willow Oaks Country Club | Richmond, VA
Windstar on Naples Bay | Naples, FL

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



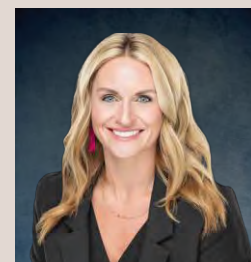
INTERIM CLUB MANAGEMENT SOLUTIONS

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
(828) 260-2308



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
480-443-9102
dick@kkandw.com

Kurt Kuebler | Partner
561-747-5213
kurt@kkandw.com

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



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Mequon, WI 53092 | 262.661.CLUB
Results@StrategicClubSolutions.com
www.StrategicClubSolutions.com



University Park Recreation District

Consideration of Revision to Ameris Bank Account Signers

We are requesting the board approve the following changes to the **UNIVERSITY PARK RECREATION DISTRICT GENERAL FUND (Public Funds Checking)** with Ameris Bank effective July 28th, 2026:

The following people should be removed as signers:

- John Fetsick
- Laurie Evans
- Curtis Nickerson

The following people should be added as signers:

- Steve Swanson
- Martin Paul Fay
- Richard Crouch

Signature



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.

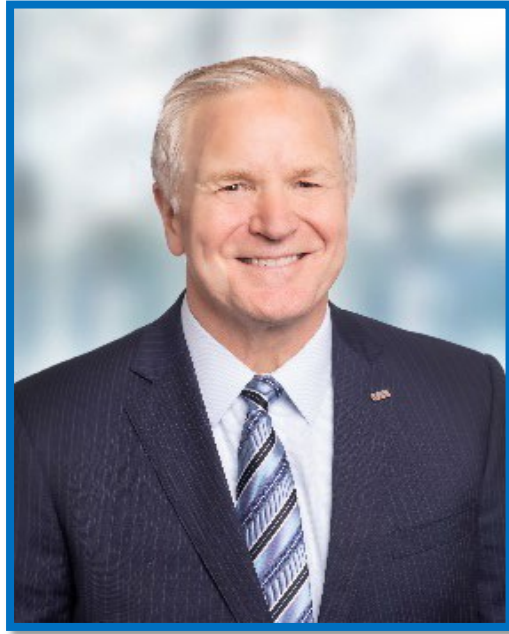
I'd be happy to answer any questions you might have. Thank you for your consideration.

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

**Consideration of Resolution 2026-19,
Assigning Current Members of the
Finance Committee to Designated Seats**

RESOLUTION 2026-19

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE UNIVERSITY PARK RECREATION DISTRICT ASSIGNING CURRENT MEMBERS OF THE FINANCE COMMITTEE TO DESIGNATED SEATS; PROVIDING AN EFFECTIVE DATE FOR TERMS; AND PROVIDING AN EFFECTIVE DATE FOR RESOLUTION.

WHEREAS, the University Park Recreation District (the “District”) is a local unit of special-purpose government located in Manatee County, and established pursuant to Manatee County Ordinance 2018-29, as amended; and

WHEREAS, in July, 2025, the Board created the Finance Committee with staggered terms for committee members being one and two years initially and two years for subsequent terms; and

WHEREAS, the Board did not initially designate terms for seats;

WHEREAS, in July, 2025, the Board approved Resolution 2026-16 designating terms for the Finance Committee; and

WHEREAS, the Board desires to assign current members of the Finance Committee to each seat.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE UNIVERSITY PARK RECREATION DISTRICT:

1. The Whereas Clauses are hereby adopted as findings of fact.
2. The Board assigns the current members of the Finance Committee to each seat as follows:

Seat 1 (2 year term): Tony Crisafio
Seat 2 (1 year term): Richard Crouch
Seat 3 (2 Year term): Craig Dwight
Seat 4 (1 year term): John Baran
Seat 5 (2 year term): Alan Port

3. The terms shall be effective as of August 1, 2025 with the current terms ending July 31, 2026.
4. This resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED THIS ____ DAY OF _____, 2026.

ATTEST:

UNIVERSITY PARK RECREATION DISTRICT

Secretary

By: _____
Steve Heitzner, Chair