From: steve heitzner <steve.heitzner@universityparkrd.com>
Sent: Monday, October 5, 2026 1:12 PM
To: BPONFS <bponfs@gmail.com>
Cc: Vivian Carvalho <carvalhov@pfm.com>; Marisa Powers <mpowers@blalockwalters.com>
Subject: Re: UPCC Management, PBM and UPCAI Relationship

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I refer you to my original response.

> On 10/05/2026 1:08 PM EDT BPONFS <bponfs@gmail.com> wrote:
>
> Steve,
>
> Bill Price.
>
> Was there an offer made to the UCPAI to which they responded?
>
> The concern "on the exploring all options" is there has been no open discussions on those options and how they are being explored.

Thanks

On Mon, Oct 5, 2026 at 12:13 PM steve heitzner <steve.heitzner@universityparkrd.com> wrote:

> Bill,
>
> First, can you identify your last name as I don't recognize your e mail address. Second, the district recently(Friday) received correspondence from UPCAI regarding the Fetsick severance issue and has not had an opportunity to review as a board. With regards to PBM, as previously stated in public board meetings, the District is exploring all options.
>
> Regards,
>
> Steve Heitzner
>
> > On 10/03/2026 6:04 PM EDT BPONFS <bponfs@gmail.com> wrote:
> >
> > Steve,
> >
> > There is growing concern regarding reports that the Board is looking to replace PBM with an outside management company and that interviews are ongoing. All that has been shared publicly in the meeting recaps is that no progress has been made in discussions with UPCAI regarding the existing PBM agreement, and that outside options or forming our own management company continue to be explored.
> >
> > Currently, it is not apparent that the full Board has been fully apprised of the specific discussions with UPCAI or what proposals have been exchanged. If there have been offers made or received regarding the PBM contract or the Fetsick issue, the Board should have been informed and voted on whether to make such an offer or accept any offer or counteroffer. However, there has been nothing so apparently there has been no negotiation nor offers. This lack of transparent Board discussion regarding the process—and what may be occurring behind the scenes—is creating significant anxiety and concern for both residents and staff.
> >
> > Many of our residents have prior experience with third-

party club management, and those experiences are rarely positive. There is an inherent conflict of interest when an outside group manages operations, as their profit motive rarely aligns with the best interests of UPRD residents and UPCC members.

UPCAI and UPRD would be best served by setting aside any past friction, aligning on a shared vision, and working through the current issues. If the Boards have not met recently, or if communications have stalled, I strongly suggest bringing in a mediator. If both Boards mutually prefer an internal facilitator to expedite the process, I would volunteer my time to mediate to resolve any outstanding issues. It benefits no one in our community for our two Boards to be in conflict.

Attached is a memorandum reviewing options for four strategic management paths available to the UPRD. I would appreciate your feedback on these frameworks, particularly the proposed next steps regarding public discussion and potential mediation.

Thanks, Bill