From: Steve Heitzner
To: Dale Otterman
Cc: Vivian Carvalho
Subject: Re: A Suggestion Regarding the Management Company Decision
Date: Monday, November 9, 2026 9:20:01 PM

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Dale,

With all due respect. You are listening to a narrow audience. Please listen to our meetings. Your comments reflect that you haven't heard what we have discussed nor that you have attended any of our meetings where companies have presented their plans. Be clear. The Board makes the decisions; not a management company. I can't tell you how many times I have said that we will not negotiate an agreement that incentivizes a company for generating profit; only improving the member experience. Having said that, we have made no decision as to which direction we are willing to go. We're listening, learning, and then intend to make a decision that we believe is in the best interests of the "entire" community for the long-term.

Steve Heitzner

760-799-0611(M)

On Nov 9, 2026, at 8:56 PM, Dale Otterman <daleotterman@gmail.com> wrote:

> Steve,
> I have never participated in a club governed by a management company. After speaking with many who have, I found their views strongly negative. Your background in that role shapes a different perspective than ours. I recognize a management company aims to generate profit, and I believe its choices could harm our club experience and staff. We would lose control over decisions and must accept the consequences.
>
> You raise valid points about our current projects. I would prefer hiring expertise for specific tasks rather than handing over full management.
>
> Dale

On Nov 9, 2026, at 7:39 PM, steve.heitzner@gmail.com wrote:

Dale,
You raise some valid points, and I'd like to understand your specific concerns about bringing in a management company such as Troon or Hampton Golf. Setting cost aside, what needs do you think would go unmet? What would we lose?
The Board is still weighing our options. The assumptions that guided us in 2019 deserve a fresh look given Sarasota's growth since the pandemic. In the four years I've lived here, I've seen recurring turmoil, and the problems go beyond Dean Matt. We need a management model that serves those of us who plan to age here as well as future homeowners and members.
We're about to invest millions of dollars in our amenities. Projects of that scale require experienced leadership, and we have very few residents with both the relevant experience and the time and willingness to take them on. Think back to how the outdoor dining project was handled. In my view, the PBM experience was a failure. As a board member, I'm determined to avoid a repeat.
It's our fiduciary responsibility as a board to choose a management approach that can handle these investments and serve UPCC well for years to come.
Regards,

Steve

Steve Heitzner
CEO/Founder
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From: Dale Otterman <daleotterman@gmail.com>
Sent: Monday, November 9, 2026 4:41 PM
Cc: Steve Heitzner <steve.heitzner@gmail.com>
Subject: A Suggestion Regarding the Management Company Decision

Dear Steve,

I know the board is working extremely hard to evaluate the various management company options, and I believe you

are getting close to making a final decision.

I do want to express a concern that I believe is shared by many in our community. When we were considering purchasing the club, many hours were devoted to discussing and determining a path forward. The ultimate decision was driven by our desire to maintain control of our future and determine our own direction. That vision was important to the community, and I believe it remains important today.

I recognize that, when elected, the board was entrusted with the authority to make decisions such as this. However, I feel that moving to an outside management company would represent a significant change in direction from what the majority of our community originally envisioned for the club and its staff.

With that in mind, I would like to suggest holding a town hall meeting before a final decision is made. All of the options could be presented, with the advantages and disadvantages of each clearly explained. This would give residents an opportunity to better understand the choices and ask questions.

I would also encourage the board to consider a community vote or, at a minimum, a nonbinding survey to gauge residents' feelings about the various options. While the board ultimately has the responsibility for making the decision, I believe it is important that the community feels informed, heard, and invested in the outcome.

We have experienced far too much discord within our community. If people feel that decisions are being made without adequate information or an opportunity for meaningful input, I fear that the division will only continue. Regardless of which direction is ultimately chosen, we need the community, board, and staff to feel

invested in the plan and supportive of its future.

Thank you for considering this suggestion. I genuinely want to see our community come together, and I would be more than willing to help in any way I can to make that happen.

Sincerely,

Dale Otterman