

## **BRUCE BONCZYK'S PLATFORM POINTS EXPLAINED**

### ***A. Provide the utmost in member experience through improved services and provide staff with the capabilities and resources to meet this goal.***

Let's break this up into three sections:

#### **1. What services could be improved?**

- a. Food and Beverage was recently targeted by some of the Lakes Village board members. This is an extremely important AMENITY. As has been discussed, operation of a private club dining facility is worlds apart from a public restaurant. By satisfaction metrics, most members feel the dining service has improved in both the quality of the food and the service level from staff. Our current satisfaction level for F&B is over 82, and Culinary Operations around 78, both improved over the starting point in 2023. That doesn't mean we should be satisfied - continuous improvement is good for both clubs and businesses, as members are more likely to return.
- b. We should listen to consultants and experts in the Food and Beverage Operations at private clubs. Why? The same reason you go to a podiatrist for foot problems, or a civil engineer for analysis of pavements. You want the experience with those who know the field.
- c. By attending House, Finance and Budget meetings, you will learn that based on the new golf amenity, projections are up, which increases costs
- d. My opponent wants to implement "changes to Food and Beverage to reduce member burden"
  - i. What changes??
  - ii. To my knowledge there is only one board member who has any restaurant operational experience
  - iii. What experience does the other Lakes candidate have in Food and Beverage - is he going to seek changes in a field where he is not an expert? What if his changes are damaging?
- e. I've spent time researching this area - Club Benchmarking, other trade publications, white papers
  - i. MW Executive Coach - "The F&B Trap" - "clubs that obsess over losing less in F&B often struggle overall as a business organization because of lower dues revenue, lack of members, poor facilities and dated environments, and a lackluster member experience."
- f. I'm all for Food and Beverage Cost Control measures
  - i. Challenging staff and management on cost control should occur in the committee process. (Reading statements into board meeting minutes

- is simply non-productive.)
- ii. In order to fully understand the challenges of Food and Beverage, directors should take the time to meet with management, understand any limitations, and work together to see where costs may be controlled. Spend a day in the kitchen with Chef and his staff.
  - g. I firmly believe increasing attendance is a method to controlling costs, as there are certain overhead costs that exist which are recoverable at a better rate with higher meal counts.
    - i. There are many ideas that could be explored, and many have been tested. I have heard many good ideas, and have a list of my own.....
    - ii. BUT, the House Committee is where we start
    - iii. Boards make policy - Management implements the policy through operations
  - h. Having served as Facilities chair for several years, I am familiar with the other chairpersons - having a good working relationship goes a long way to being heard on issues
  - i. Example of Improvement - Delivery to home of take out meals - this to me is a great member enhancement that could be called the proverbial “low hanging fruit” - simple to implement with a great benefit to members.

**2. Provide staff with the capabilities and resources to meet the goal of improving member experience.**

- a. Facilities Improvement - Management does a good job of maintaining the club’s facilities. However, as the club gets older, more projects will arise. Budgets and reserves are critical, and Colonial has a very detailed reserve system. But updating is a must. Facilities improvement is absolutely tied to member experience. Here are some examples where I have been DIRECTLY involved as Facilities Committee chairperson:
  - i. Reverse Osmosis Water Treatment - the club gets its water from the City of Fort Myers. As many of us know, the taste of the water is not the greatest, and in the past, many service interruptions were encountered. A Reverse Osmosis Water Treatment system was installed at the clubhouse. Not only did it improve the taste of the water, the system has the capability to store treated water, which allows limited clubhouse operation in boil order situations, rather than just shutting down.
  - ii. Treeline Entrance Gates - What can improve member experience better than not being trapped at the Treeline Entrance? The up-front design work and bidding has been completed, and this project is being started in early January. It will be using improved products which have a good

- track record.
- iii. The list goes on and on: boardwalk replacement with extremely low maintenance product; pool deck replacement; new efficient irrigation pumps, etc.
- b. There are many similar improvements which make staff more efficient, ranging from kitchen equipment, racquet sport improvements, golf operations, irrigation systems, and more all across the club. By upgrading to best practices, manpower becomes more efficient and we get more production per dollar. A perfect example is the computer controlled irrigation system that agronomy staff can control off their smart phones. These improvements are raised by either board committees or management, and analyzed for the best rate of return or improved member experience. It is simply unfair to members and staff to not provide what is needed for continuous member experience improvement. Remember, if it is more efficient to perform their work, employees are happier, which means better member experience.

**3. Budget Control and Affordability - This is tied to both the member experience and providing staff the ability to perform.**

- a. Everyone is experiencing inflationary pressures, and sometimes many are hurricane driven here in Florida.
  - i. My local COA just in the past five years has experienced a 43% increase in common area expenses.
- b. Budget review is extremely important and takes place with management and the board. It is a months long process, usually starting in July, where many decisions evolve. I will be involved and attend these meetings.
  - i. Unfortunately, none of the Lakes directors attended the budget workshop. Pricing could have been negotiated.
  - ii. The candidate who is running against me, actually missed 40% of the regular and special board meetings in his short 10 month tenure.
  - iii. The candidate who is running against me, only attended one meeting of the cable transition committee, and never submitted the written review he promised of the testing of the final two vendors.
- c. Affordability is considered at the committee level and works it way up.
- d. Creation of budget priorities takes place in committees.
  - i. New ideas can be introduced there.
  - ii. For example, should all amenities be fee based?
  - iii. I have a good working relationship with most committee chairs based on my experience as a committee chair.
- e. Board members (and residents) should raise issues in the committee structure.
  - i. Stop filing all these document requests which cost thousands of dollars for responses.

- ii. The candidate who is running against me has filed at least 13 document requests, more than the number of board meetings he has attended.
- iii. We are roughly \$100,000 over budget in legal fees based on complaints filed by certain directors and residents.
- f. How did I save Colonial money with my volunteerism??
  - i. Numerous contract reviews before sending to Colonial counsel (Brightview, A/E, Contractors, Vendors, Comcast)
  - ii. Negotiated contract terms
  - iii. With Facilities Committee members, performed plan and specification reviews
  - iv. Local Rec Board - scope and bidding documents for pool work
  - v. Local HOA - roof replacement oversight
  - vi. Other CCC committees

***B. Facilitate cooperation among Lakes and Golf Village board members, as well as the residents of both Villages.***

The division in this community has to stop. Period. I get it that some people are upset over the fact the entire project was not voted upon. The fact is, these events are in the past. I believe the discord that occurred has been recognized and will be considered in future decision making. I know I will definitely take it into account.

We should live in recognition of how fortunate we are to be in Colonial, and strive to enjoy this beautiful club. We need to get back on an even keel so our time is spent on the pleasure that is afforded to us.

A director who recently resigned said he wanted to be elected because “I am committed to collaborating with all members of the Master Board and our membership to move Colonial Country Club forward - maintaining and modernizing amenities, ensuring fiscal responsibility, and upholding the standards that make our community special.” I do not think in any way that last campaign promise has been realized. In fact, the opposite appears to be the case based on recent disclosures from various law enforcement and administrative agencies.

We have directors who call for transparency. You know what the opposite of transparency is? Not reaching out to the community for anyone interested in open Board positions. We had two board member appointments where neither appointed person had participated in any standing or ad hoc committees in Colonial. Learning on the job as a director is simply not realistic - that has already been proven unsuccessful.

I believe in an open process - if any director appointments are needed in the future, there should be a notice of the openings, submittal of applications and interviews before any

selections are made.

Here are some ideas that I will promote to fix the division problem:

- a. Ad Hoc Civility Committee - much like the governing documents committee, I would seek an Ad Hoc Civility Committee with equal membership of Lakes and Golf volunteers. Let's get some hands on involvement from our members. Members should identify problem areas and promote solutions for the board to consider.
- b. Here is a hot topic from my discussion with Lakes Village members - the new golf fee structure for the Lakes Village. This is a missed opportunity because the new Lakes directors did not show up in the budget process. Now we have a problem that cannot really be resolved until next year, because a budget was approved using this fee structure. Changing it would mess up budget projections. The golf course is Colonial's premier amenity, and Lakes Village members have a right to use it per our governing documents. I will make this a priority for adjustment, and my good relationships with other committee chairs should insure we are heard in the committee and budget process.
- c. If we want to pit Lakes v. Golf - then let's do it as a friendly competition. Who gathered the most Toys for Tots? Which group has the most community volunteers? What about best Christmas or holiday decorations? Something that brings us together.
- d. Director One on One Informal Meetings - Let's start with all new directors, including me if elected. The new directors have a sit down with each of the existing board members - not as a group, but individually - to have an exchange of each other's priorities and concerns. Likely there will not be total agreement, but it creates a discussion. This way everyone has a general understanding and gets to know the other director.
- e. For our Social Media users - please think about what you are writing. Don't try to mix opinions and facts. Research your facts before you write. Reach out to directors with concerns - you will have my contact info. If you have an opinion, make sure it is clear it is just your opinion.

***C. Foster community trust in the Master Board through listening, understanding, open discussions, and sharing of information.***

You have seen me reach out. I want you to get to know me. I want to hear your concerns. Hopefully we will get to know each other much better.

I feel people trust me because I do listen. I adjust my actions based on valid concerns. I respect people's opinions, even if they don't agree with mine. My personal opinion is not always my Colonial position, because I have to do what is right for the good of Colonial. We

have had a lot of folks opine about issues we have dealt with in Facilities Committee and I have worked to find ways to get things done. I feel other chairpersons and directors trust me. As I explain to others, my goal as a committee chair is the get the job done - most cost effectively for members.

We have two Lakes Village Directors appointed nearly a year ago that have never reached out with any town halls or meet and greets since their appointment. Nor have they ever provided the Lakes Village residents with their positions, platforms, or even a resume in all that time. Directors work for you - we should know they have the experience and commitment to do so.

With respect to sharing of information, things are difficult right now. We have residents and board members filing requests for documents, many of which are duplicates. Unfortunately, with the multiple threats of litigation, and actual filing of complaints with law enforcement agencies, this has created a situation where now some documents can't be released or must be redacted because the parties are adverse, and such communications are between the challenged board members and staff and Colonial's legal counsel.

The community is seeing the allegations against the board, its officers and the general manager have no merit. Read the documents alleging criminal and civil actions - they contain no facts of wrongdoing - instead, they are asking all these agencies to see if they can find any sort of violation. And the agencies to date have confirmed no criminal actions exist.

I believe the following are potential solutions:

- a. Conduct Regular Town Halls - I found the town halls that prior Lake Village directors conducted to be useful question and answer sessions. Each one I attended provided me with additional information on how Colonial operated. I feel these provide residents the ability to voice their concerns, and hopefully, some acknowledgment of things we do well here at Colonial.
- b. Request that all directors disclose any social media, web or email sites they are associated with or operate from their residence. Directors should not be operating anonymously. As a director, if you have an opinion, disclose it in properly, not anonymously on social media. Your fiduciary duty lies to Colonial, not other associations. You can certainly belong to any such groups, but disclose which ones so we can watch for potential conflicts.
- c. If you have a problem with governance, bring it to me. Let's see what the issue is and whether it can be resolved with management. If it is more policy driven, then we can have a discussion. When warranted, I will bring the issue to the other directors, and keep you informed of where things may go.

- d. Promote your concerns for action. If there are issues to be addressed, I will work with one or all of you to put together a plan of action. I will then meet with other directors to explain the problem and desired solution, and promote such action through formal motions. I will then do my best to get a positive vote and outcome.
- e. Create a Leadership Development Committee to identify persons who the committee believes would make good directors, and provide educational options with respect to Colonial governance and operations. Let's provide those interested volunteers with tools for success.
- f. Promote mediation efforts with directors using professionals, if needed, to help cut through the incivility.

I would certainly appreciate your vote so that together we can continue to evolve Colonial Country Club to be a desired, top tier, fun and affordable club.