





SaddleBrooke One Board of Directors

Dear Jo Ann,

At the January 25th meeting of the HOA1 Board of Directors, a draft 5-Year “Strategic Plan” was revealed. It was the product of just one individual, newly elected board member Joe O’Connor. The Board approved a motion to submit it to residents for 30-day review and comment.

We have several concerns with this matter.

First, as per your admission, you assigned the development of the “plan” to Mr. O’Connor without consulting with the full Board. We consider this lack of transparency appalling.

Strategic planning is a critically important function and should be accomplished only with the full knowledge and participation of all Board members.

Second, we object to the idea that one individual, no matter how gifted, can construct a proper strategic plan for our entire community. Input from us, the residents, must be solicited early and frequently. We are offended that, on a matter of such importance, you sought our input only after the plan was almost fully developed. Do you not trust your own residents?

Third, consulting only with operational staff and past presidents and not your fellow board members shows a lack of regard for HOA “best practices.” We firmly believe that a

third-party consultant should be retained to assist the Board in the development of a strategic plan. Board members, however well-intentioned, simply do not have the skills and experience required. This is standard practice amongst HOAs.

HOA2, for example, recently hired McMahan Group to develop their strategic plan. We should consider the same since our communities are deeply intertwined. After all, HOA1 currently hires

third-party expertise in other areas such as merchandising for the golf shop, a golf architect and external attorneys to ensure success.

So far, we have commented only on process. Concerning the content of the “plan” itself, which we are now all asked to review, we find many glaring omissions:

- Why is there no mention of the threat of non-renewal of the Reciprocal Use Agreement?

- Does HOA1 honestly believe that it could survive on its own without a theater, pickleball, dog park, or adequate fitness rooms?

- Why is there no goal for cooperative efforts between the two HOAs, as mentioned in the April 2022 HOA1/HOA2 joint statement on merger, which you yourself authored?

- Why were past resident requests for hiking paths, sidewalks, a coffee shop or ice cream parlor, etc., completely ignored?

In sum, we are extraordinarily disappointed and upset by these recent developments. We are circulating this letter to the entire HOA1 community and recommending that rather than

comment on the substance of the “plan,” residents should demand the whole matter be returned to the Board for further consideration. Let’s get it done properly and transparently from the beginning.

Sincerely yours,

Board of Directors

United SaddleBrooke