



THE 2022-23 BOARD OF DIRECTORS

Tom Christopher, *President*
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Peggy Lowndes, *Director*
Lars Lundholm, *Director*



Annual Report

2022



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From the President



Dear Residents and Homeowners:

For all of us, 2022 was an extremely challenging year. We continued to make notable improvements in the community in the face of considerable distractions. These included the various Covid precautions that frequently changed, having FPL suddenly appear and proceed with the installation of a new high voltage power line and towers project that damaged the community and neighborhood landscaping, and finally enduring a hurricane with the resultant complicated loss of power and recovery cleanup process.

We began with a yearlong effort to completely rewrite the legal rules for the overall administrative policies and practices in the Park (Covenants, Conditions and Restrictions or CCR's) as required by the State of Florida statutes. The rewriting and legal and resident reviews involved an extensive dialogue associated with the details of the documents. We project now that this momentous effort will be completed in the first half of 2023.

Over \$1.5 M in upgrades in the lift stations, manholes and emergency gates, were completed including a complete entry gate upgrade program. We began a significant landscape upgrade program, completed a new website and now utilize it to better communicate everything that is happening in our community.

Our committees' efforts and the volunteer residents that form them are key to our progress. Our work in all these areas required substantial efforts by over a hundred residents who formed the basis of our key committees on a volunteer basis. These committees take their direction from the board and lead our initiatives in all of these areas. The committees are organized to focus on the fundamental requirements necessary for long term success in communities. Their accomplishments towards these requirements during this year have been impressive:

1. Robust infrastructure systems
2. Resident safety and security
3. Community Outreach & Fund-raising
4. Residence and community architectural standards

The list of the committee members are on the final pages. They are your neighbors and are using the skills gained during their working lives to accomplish significant achievements in our community on a part-time basis. Our continued success in the future will always rely on an ongoing supply of new volunteer residents to join us and gladly welcome new homeowners to join us in these areas

A handwritten signature in black ink that reads "Thomas A. Christopher".

Tom Christopher
President UPCA



Finance Committee

Your Finance Committee consisting of 8 of your friends and neighbors, has been highly active again this year in the establishment of and monitoring UPCA financials to make sure they are stated conservatively, totally transparent to the everyone who lives in University Park, are productive and, spread evenly so all residents (homeowners) benefit equally.

THERE ARE 66 DIFFERENT BUDGETS

(33 Operations budgets and 33 Reserve budgets).

The Community Operations budget encompasses all land not in neighborhoods plus Comcast, lift stations, gazebo, access gates, PBM salaries, gate house expense +++. In addition, the Finance and Infrastructure Committees collectively develop a Reserve Schedule that contains replacement cost and useful life of all capital assets and are funded to full replacement cost at the end of each asset's useful life.

Here are the 2022 preliminary financial results that will become final after the audit is completed during 2023. The community and each neighborhood has two budgets: Operations and Reserves.

ON THE OPERATIONAL SIDE

Community revenue was \$3,714,902. This was 0.034% less than what we projected. Community expenses were \$3,667,795 or 3.03% less than what we projected. This favorable experience will be added to the operations surplus after the audit is completed.

ON THE RESERVE SIDE

Consolidated expenditures were \$877,428. This is close, in total, to what we expected to spend.

ON A MACRO BASIS

We had some negative surprises and some positive results that balanced out and made for a favorable year.

- 1.** Hurricane Ian clean-up is placing a tremendous burden on our budgets. It is anticipated that Community expenses alone will be over \$100,000.
- 2.** With the assistance of the Finance Committee, the neighborhood Chairs have done a spectacular job in 'stepping up' to play a very active and educated role in developing and managing each neighborhood's budgets both on the income statement and expense control side, and balance sheet management.
- 3.** The Finance Committee members want to recognize Beverly Latine, UPCA Controller for her remarkable work in coordinating all 66 budgets and financial statements each month during the year.

BILL LOCKHORN
CHAIR

Infrastructure Committee

2022 was a very busy year for the Infrastructure Committee. It began with the overhaul and new liner for the Wilton Crescent Lift Station and the repair of the last 23 manholes whose 2020 visual examination had identified the need for a major repair within two years. The entry gates evaluation program took six months and ended with the decision to proceed with a major upgrade of the three gates starting in December. The sidewalk evaluation program resulted in the decision to repair all sidewalk gaps greater than ¼ inches and costs and budget planning for the common area and neighborhoods were produced.

The potable water system evaluation was completed following meetings with Manatee County, critical valves were identified and marked, and a long-term testing and repair program identified. Following equipment failures at a number of irrigation pumping stations, a detailed evaluation of the currently recommended standard stations design is currently underway and will likely lead to significant changes next year.

Finally, the observation dock and pergola had major repairs performed and repainted while the Gazebo has been delayed due to a shortage of qualified contractors.

TOM CHRISTOPHER
CHAIR



WILTON CRESCENT: Test of new Bypass Pumper



OPERATION HEADLIGHT: Affixing RFID decals—a critical component of the upgrade to our Gates system



OBSERVATION DECK: Major repairs were made including repainting of the structure



UPCAI Governing Documents—CCR Covenants, Conditions and Restrictions

Chair Council and Neighborhood Committee

This is the third year of the new UPCA Chair Council after UPAC was disbanded in 2019 when turnover occurred. It's comprised of the elected Chair of each of our 32 neighborhoods supported by a minimum of two neighborhood committee members. It has its own set of Board-approved bylaws and makes recommendations to the Board. Its mission is to be the communication focal point between the residents and the board on major issues and initiatives and management of neighborhood budgets.

This group of dedicated neighborhood leaders is essential as the link between residents and the UPCA Board. The Board relies upon their collective views and input as we make decisions for the entire community. Our Chairs work hard to get information out to their neighborhoods and take their responses and comments back to the Board for their consideration.

In 2022 they successfully performed their role as the chair of their neighborhood committee in the following efforts:

- Developed and conducted more speaker-focused efficient monthly meetings
- Updated the annual Chair Council Manual and supplied training to new Chairs
- Actively participated in the draft process of revising CCR and SD's
- Provided a forum for discussion of proposed Infrastructure projects prior to formal Finance and Infrastructure Committee final reviews
- Supplied input and oversight of neighborhood specific projects including the sidewalk repair program initiative and the storm drain boxes repair programs
- Maintained oversight and control of the neighborhood specific financial budgets including operational and reserve expenditures throughout the year

The "UPCAI governing documents" include the Articles of Incorporation, Bylaws, the Declaration of Covenants, Conditions, and Restrictions (CCR), and the Supplemental Declarations (SD) applicable to the 32 neighborhoods. These documents provide the governance framework for the management of UPCA through the elected Board, and as applicable to Park Boulevard Management (PBM), Neighborhood Chairs and Committees, Board-appointed Committees, Lot Owners, residents, and tenants.

In anticipation of turnover, a group of 5 Neighborhood Chairs was formed in late 2018 to review and then write the first draft of our CCR's to reflect control of University Park homeowners and association members. The draft was completed in December 2019 when the project was turned over to the first elected Board of Directors and the process continued as the 2020 Edit Team's cumulative work was turned over to our General Counsel.

After additional edits were accepted by the Board in late 2021, the first step in the approval process of the governing documents was the voting of the revised SD by the 32 UPCA Neighborhoods.

The second step is now underway with a review of the scope of the proposed amendments to the Declaration (CCR) first to Chairs then to Lot Owners in August with draft documents included on our website. The approval of the proposed amendments to the Declaration under the existing governing documents will require the approval of the Voting Members representing at least 2/3 of the Members,

The draft CCR was divided into four groups to facilitate the review process. The review with Voting Members has been ongoing for three months. The suggestions that have been received to date are being reviewed, and if any further edits are appropriate the draft documents on the website will be updated with the changes listed and described. After further opportunity for the Voting Members to review, the Board will convene a special meeting of the Association for the sole purpose of considering the approval of the proposed amendments to the CCR, which again under the existing governing documents will require the approval of the Voting Members representing at least 2/3 of the Members.

PAT THOMPSON
AD HOC COMMITTEE CHAIR

Architecture & Landscape Committee

The ALC meets weekly via Zoom to review residents' applications for changes they want made to their homes' exteriors or to their landscaping. Committee members total five UP residents representing 5 different neighborhoods. The meetings are every Friday at 10AM. Residents are encouraged to tune in to see what the committee reviews and approves or denies and the reasons why. It's a great learning experience.

2022 hit an all-time high in applications received – 600. The greatest number of requests was for tree removal (150) followed by 85 new roofing jobs, and 85 new painting requests. Over 20 new generators were resident-installed in University Park this year, and they were needed!



HERE'S WHAT WE ACCOMPLISHED:

- The Architecture and Landscape Committee (ALC) met 48 times this year in regular meetings and several more times in workshops where we updated and revised the current ALC Regulations.

1. Approved new synthetic roofing material.
2. Approved new black or bronze window frames.
3. Condensed four separate application forms down to one comprehensive form.

- The application procedure was streamlined by changing the weekly application deadline to Tuesday from Wednesday. Now all photos will be accepted in jpeg format to save hours in converting emailed photos into one compatible format.

- The committee chair began presenting a 3-minute refresher on ALC regulations for the Chair Council at each of its monthly meetings.

- Several committee members wrote timely monthly articles for **"UPtoDATE,"** the UPCA resident e-newsletter.

- The ALC members worked with the Landscape Master Plan group to edit the new University Park Tree Policy which will be released shortly.

- Each week a committee member visited selected homes that have more complicated or unclear applications, often engaging with the homeowner to gain an understanding of what is being requested. This involves plans/problems with landscaping, drainage, roofing, painting, and many other topics.

We will continue to stay in contact with our residents and work toward solutions to the many varied requests that crop up in a vibrant community such as ours.

KATHY BONDUR
CHAIR

Outreach Committee

Supporting locally operated non-profit organizations is an important part of University Park’s philanthropic culture and long history of outpouring of charitable giving and support. We have always strived to be a socially responsible community.

In 2006 UPCA created a thriving Outreach Committee to endorse and support hand-selected charities under the University Park community’s name. The mission was and still is to be a reliable, long-term advocate and partner vetted charities by focusing on a small number of organizations where resident support can be realized and makes a significant difference. The Committee thinks local and acts local. It works to improve the health and wellness in the Bradenton/Sarasota area by improving food access for the hungry (including seniors) and educational amenities for needy children.

Here are the four charities that comprise the Annual UPCA Outreach Calendar:

1. F.E.E.L.T Feeding Empty Little Tummys
2. Food Bank of Manatee Meals on Wheels Plus
3. Huggs and Smiles
4. Mayors’ Feed the Hungry Program

LINDA VERSLUIS
CHAIR



Huggs and Smiles: Donation Turnover

University Park Women’s Club

Established in 2001, UPWC is a not-for-profit independent social organization that offers year-round activities and promotes friendships and shared interests among women residents and Country Club members of University Park.

UPWC is a vibrant, active organization that has grown from a first-year membership of 89 to over 400 members in 2022. The UPWC Board conducts four yearly luncheons (October, December, April, and June), a February Fashion Show, a Charity Event and activities that 75 volunteers plan and organize to keep its members engaged.

Over 20 special interest groups, provide opportunities for its members to improve the welfare of others through community service activities.



Volunteer Wall of Fame inductee: Linda Versluis

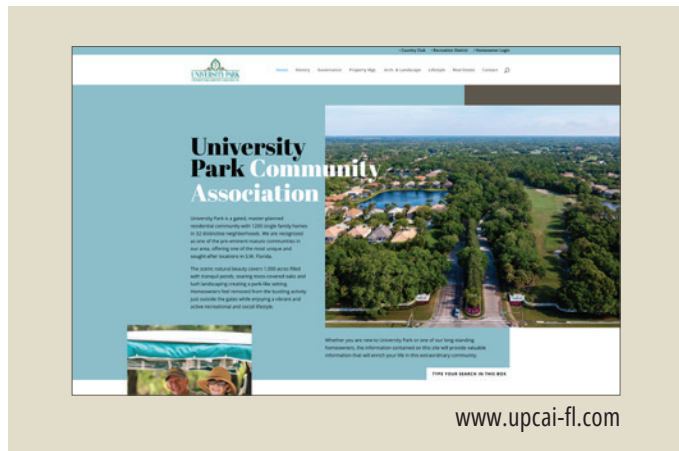
Communication

Communication is the secret to every strong relationship and is no different when it comes to homeowner’s associations and homeowners. Open communication between our HOA board directors and residents is crucial to the positive culture of our community. It helps foster trust, promote transparency, and ensure everyone in our HOA is clear about rules and expectations.

We are fortunate to have several in-house managed tools to keep our homeowners au courant on community news.

The first is our renovated UPCA website that will be a year old. It’s updated on a weekly basis, and we’ve expanded the content and usage beyond original expectations.

The total combined number of visitor and resident “hits” to our web landing page was over 60,000. We credit this achievement to the striking design, photographs, easy navigating, and relevant articles that all combined to communicate the “University Park Experience” to everyone who visited our website.



The UPCA community e-newsletter **UPtoDATE** had a total format “facelift” that makes it easier to read with larger fonts, provided a greater variety of topics and published 8 times online in addition to printed copies available in designated places. We will continue to challenge and urge our “guest editors” and residents-at-large for their contributions and keep looking for innovative new ways to talk to each other from the comfort of your home and on your screen.



Ponds Committee

2022 was the second year for the Ponds Committee. We continued to be educated by guest speakers/experts to help make the members more proficient and knowledgeable about pond management. Our guest speakers included representatives from Southwest Florida Water Management District (SWFWMD), Solitude our pond management contractor and the Audubon Society.

Our record of algacide treatments on individual ponds indicated that ponds exclusively on Golf Course property where they have established no mow zones required fewer treatments than ponds surrounded by personal properties where no mow zones are beginning to be introduced. Voluntary guidelines were set for no mow zones on personal properties asking homeowners to leave a 2–3 foot wide area along the ponds where the vegetation is allowed to grow to 8–10 inches high. First off, the no mow zones reduce the amount of nutrients from clippings and fertilizer reaching the ponds which will reduce the amount of chemicals needed to control algae. Secondly, the no mow zones attract wild birds, butterflies, and wading birds. But most importantly, the no mow zones will keep the heavy lawn mowers away from the edges of our ponds and will slow down the erosion of the sandy banks into the ponds, which will require very expensive and disruptive dredging to retain the flood control capacity of our ponds.

We have set up an “early warning system” where each Committee member is assigned specific ponds to monitor. All 50 ponds are periodically inspected by a Committee member and when an issue is found, it is reported to either PBM or Solitude to take corrective action. It was difficult for Solitude to inspect all the ponds every week, but now through Committee member’s periodic inspections and neighbor feedback to the Committee, we direct Solitude to the problem areas resulting in more effective control. Few complaints were received in 2022 from neighbors about unattractive pond algae situations in their back yards.

In 2021 we spent close to \$20,000 manually skimming algae off problem ponds. Our “early warning system” was effective resulting in no manual skimming this year. There has been a gradual expansion of a water lily called Spatterdoc in the shallow borders of our ponds. There are residents who find this an attractive and natural element on the ponds while others are concerned it may expand to become offensive. The Committee will monitor the expansion of Spatterdoc and solicit resident’s input.

The Ponds Committee objective for 2023 is to encourage more homeowners in the “non-landscape contracted” neighborhoods instruct their landscapers to leave no mow zones on the banks of the ponds. Currently about 60% of the neighbors have no mow zones. Our objective is to increase this percentage.

DAVID VAN BRUNT
CHAIR



Landscape Master Plan

The beauty of University Park has distinguished itself as one of the best planned communities in SW Florida with its lush natural “old Florida” landscaping and thousands of trees. The Landscape Master Plan (LMP) Team was created to define, for the coming years, the next stage of stewardship by providing direction for preserving and enhancing the community’s common land landscaping to keep UP relevant and, our home values competitive.

Our present landscaping has, over the years, not had the necessary attention and care needed to remain healthy and attractive. The LMP is addressing that while working towards reducing costs and irrigation needs.

In 2022 plans were created for the Phase 1 landscape update along University Parkway and up The Park Boulevard to the Gatehouse. Comprehensive plans were then sent to the community, initial feedback was not well received, and the Team went back to the drawing board and new, simplified plans were created and again communicated to the community via e-Blasts, **UPtoDATE** articles, Zoom and in-person meetings. Small adjustments were made after reviewing new feedback plus conducting 2 focus groups before arriving at the final plan.

Phase 1 of the Landscape update was installed using ‘Florida Friendly’ plantings. These plants will initially

require irrigation to get established, but once they are, the need for irrigation will be reduced, and in many cases, eventually not needed. The phrase “Sleep, Creep, Leap” is used among gardeners to simplify the typical growing phases of a tree or shrub. When plants are initially installed it appears they are sleeping above the ground, but below the ground the roots are growing. A well-established root system makes it easier for plants to soak up water and keep the plant healthy to withstand the summer heat. They then “creep” by slowly growing since they are still establishing a strong root system. Once established, they begin to “leap” and flourish. Landscaping takes time to get established but come spring, the plants should be established sufficiently to begin to “creep”.

During 2022, in addition to Phase 1, the LMP Team created irrigation directives for PBM to provide to our landscape vendors. PBM landscape contracts which had not been approved in quite a few years were updated with LMP assistance. The Team is currently working with the Architecture and Landscape Committee (ALC) to provide proper tree maintenance practices and create the first Tree Policy for University Park.

JANETTE GATESY
CHAIR





C.E.R.T. (Community Emergency Response Team)

2022 was a very busy year for UP-CERT! Prior to Hurricane Ian's arrival, CERT initiated the coordination of hurricane preparedness plans with PBM and UPRD. After Ian left, CERT activated by checking homes for significant damage, injuries, flooding, road conditions, etc.; coordinated with the Fire Department when they came on the scene; and maintained contact with Manatee County's Emergency Operations Center (EOC) for 5 days to periodically report in with University Park's status.

OTHER ACCOMPLISHMENTS INCLUDE:

- Assisted with creating a webpage for CERT on the UPCA website
- Continued to support CERT activities and liaison with Emergency Management of Manatee/Sarasota
- Assisted with CERT training in Manatee County
- Updated the UP-CERT Organization, Preparedness and Response Plan Manual
- In process of updating the Radio Communications Manual
- Assisted with updating the PBM Disaster Recovery Manual
- Consolidated CERT inventory in the Community Center
- Defined and purchased backup radios and antennas
- In process of having CERT members who will have radios obtain FCC General Mobile Radio (GRMS) licenses
- Conducted two Town Halls
- Positioned CERT to conduct in-house training through Train the Trainer courses
- Identified 4 new volunteers for training in 2023.

GIO CANTARELLA
CHAIR

The Spirit and Power of Volunteerism in University Park

A community with volunteerism as a core value uplifts and motivates others to do the same. Through our existing corps of resident volunteers, we're grateful and owe a considerable debt of thanks to having access to areas of knowledge and expertise that would otherwise be costly or inaccessible to our community management. Our board and committees boast legal counsel, financial planners, bankers, CPA's, marketers, infrastructure specialists and small business operators and owners for starters. The knowledge they share and advocacy they demonstrate for us makes our entire community stronger.

These talented volunteers are our friends and neighbors who together with PBM Staff, enables us to continue to lift its horizons, perhaps well-beyond other local communities.

If you are looking for ways to make your community a better place and to help set direction and manage the present and future of University Park, consider becoming a resident volunteer. We need new/additional volunteers, new people who will help diversify the board and committees and bring in new talent and ideas for improving our community.

BOARD-APPOINTED UPCA COMMITTEES

Board Director (7)
Architecture and Landscape Committee
Ad hoc Committee(s) short or long term
CERT (Community Emergency Response Team)
Chair Council and Neighborhood Committee
Election Committee
Finance Committee
Infrastructure Committee
Landscape Master Plan
Outreach Committee
Ponds Committee

Our 100+ Volunteer Residents December 2022

ARCHITECTURE & LANDSCAPE COMMITTEE

Kathy Bondur, Chairwoman
Sara Hans, Chris Lukowitsch,
Lynda Morrison, Robert Neal, Emery Tapley

CERT

Gio Cantarella, Chair
Vice Chairs David Cohen, Jack Gatesy
John Barry, Eileen Cantarella, Janette Gatesy, Murray Kaftan
Zone leaders & Team of trained volunteers

ELECTION COMMITTEE

Joyce Giberti,
Barbara Mulvihill
Jennifer Everingham Ass't Board Secretary

FINANCE COMMITTEE

Bill Lockhorn, Chair
Jim Barrett, Steve Cerjan, Dick Crouch, John Fricke,
Lars Lundholm, Toby Morrison, Pat Thompson

INFRASTRUCTURE COMMITTEE

Tom Christopher, Chair
Werner Baumgartner, John Fricke, Tom Lordi,
Charles Marzullo, James Pearson, Henry
Resnikoff, David Van Brunt

LANDSCAPE MASTER PLAN

Janette Gatesy, Chair
Kathy Bondur
Christine Lukowitsch
John Whyte

OUTREACH COMMITTEE

Linda Versluis, Chair
Mary Barry, Re Gibson, Sandy McClure, Mary Hohler,
Paula LaPierre, Julie Moser, Dan Rex, Leslie Timme.

PONDS COMMITTEE

David Van Brunt, Chair
Doug Cassman, Glen Cooper, Bob Grady,
Joe Kotey, Carolou Marquet, Maria Meredith,
Jack Shabe

CHAIR COUNCIL

Dr. Rich Tennenbaum, Stanhope Gate, *Chair*
Robert Grady, Richmond Park, *Vice Chair*
Sondra Ettliger, Wilton Crescent, *Secretary*

Albemarle, John Bondur
Ascot, Denise Chimbos
The Boltons, Markus Kostner
Chelsea, Jeff Sebeika
Devonshire Place, Jack Gatesy
Eaton Place, Ken Burghy
Grosvenor Gardens, Joe Kotey
Hampton Green, David Van Brunt
Heathfield, David Cohen
Henley, Don Baron
Highgate, Ivan Rubin
Hyde Park, Duncan Dickson
Kenwood Park, Elaine Kulbako
Knightsbridge, Constance Bennett
Langley Park, Timothy Ryan
Lansdowne Crescent, Gio Cantarella
Lennox Gardens, Dana Balionis
Marlow, Seymour Kagan
Mayfair, Bill Mutryn
Notting Hill, Olaf Maly
Regents Park, Maria Meredith
Richmond Park, Robert Grady
St. James Park, Toby Morrison
St. John's Wood, Judith O'Donnell
Stanhope Gate, Dr. Rich Tennenbaum
Sloane Gardens, Karen Albrechtsen
Virginia Water, Greg Selep
Warwick Gardens, Steve Cerjan
Wentworth, Kris Pizzi
Whitebridge Court, Scott Aja
Wilton Crescent, Sondra Ettliger
Wimbledon, Len Goldstein
and
Members of our 32 Neighborhood Committees



UPCAI OFFICE

UNIVERSITY PARK
COMMUNITY CENTER
M-F | 8:30AM-5:00PM
941.355.3888
8301 The Park Boulevard
University Park, FL 34201
www.upcai-fl.com

We are on the right before
the Gatehouse



Gate Access Control Manager
941.355.3888 x256

dwellingLIVE
<https://community.dwellinglive.com/universitypark.aspx>

UPtoDATE Newsletter
<https://upcai-fl.com/lifestyle/>

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