

Suissevale Survey

Good Stewardship

Background and Method:

For one week in April 2020 Suissevale owners took an online survey asking them how they would rate the stewardship of the current Board of Directors of Suissevale (BOD). The survey was distributed online via a website, Facebook home page and by email to an estimated 300-320 potential respondents. There were 89 responses compiled. The survey was anonymous, and the 14 current board members could take the survey.

Good Stewardship:

Good stewardship is defined as exemplifying the following characteristics: being responsible and accountable, building value for members and into the future, practicing inclusiveness, welcoming new ideas and fresh perspectives, being team players and working with all members, seeking advice and feedback and being transparent.

Overall Findings:

Nearly 70% of respondents rated the BOD as Fair to Poor on being good stewards with only 20% rating them as Very Good or Excellent. Most respondents did not feel the Board is transparent, nor are they inclusive or welcoming. It was felt that in general the board does not communicate well with owners and they are not open to new ideas. Members felt the current dues stability is good. Clearly, most respondents were unaware of the large number of lots owned by POASI or of the value of this land. Nearly 70% of respondents felt Suissevale should have a professional audit and they felt the Board not hiring a CPA to do this undermines owners' confidence in Suissevale's financial status.

In comments, many owners seemed outraged that the BOD cut off input by attendees at a recent meeting which discussed the 5-year plan. This tendency of the BOD to stifle feedback from owners with no explanation came through in several questions. Over 65% of respondents felt owners should have access to voter and financial records. This lack of transparency was particularly disliked when the owner had gone through the proper channels (i.e. filling out the board's form for asking questions.) Over 70% of the respondents wanted to have the water issue resolved with some requesting professional help and others saying no additional money should be spent on research without consulting the members. The question on removal of a board member seemed to draw the most ire with 75% of the respondents saying it was not justified. Much like the financial and voter records most respondents felt the board should release a copy of the Insurance Policy to any member who requests it.

Rating the current BOD on stewardship:

Thinking of the POASI Board of Directors, how would you rate them on being **good stewards** for the Suissevale community? Excellent, Very Good, Fair, Not so Good, Poor

Nearly 70% of respondents rated the BOD as Fair to Poor with only 20% rating them as Very Good or Excellent.

Detailed Stewardship Comments are on the next page:

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The following is a proportional sample of some of the nearly 50 positive and negative comments:

Comments from those rating Fair to Poor:

"I do not feel they are transparent at all and when asked a question they don't like; they get defensive and at times are bullies."

"one example – there is a committee list on their website – they have asked members to volunteer which some have but as of today their names have not been added to the Committee list and never heard back from the chair of the committee."

"They are not accountable for their actions. They change the rules to fit their needs."

"Zero transparency, acting in a way to serve their own needs before those of the community."

"They are not inclusive, they don't want to work with anyone outside the BOD, and don't want to share info with the members who pay the bills of the Association."

"Too many lawsuits; mismanagement of water issues"

"They bend the rules for themselves."

"They seem to keep too many things from the members."

"No information provided to out of state owners."

"They do not meet the definition of the term: good stewardship"

"I don't appreciate that every request for our information results in petty bickering. All information should be readily available."

"Do not communicate, are not transparent nor inclusive."

"They are corrupt and dishonest."

"They don't listen to new ideas; in fact, they discourage input. They go into closed session to

discuss topics they don't want membership to hear. They send out financial reports and minutes very late. They do not allow videotaping mtgs..."

"The BOD has not been inclusive with members. I have tried to volunteer and that has been discouraged. They are not transparent, and they do not respond to requests for information in a timely manner, if at all."

"They are in their own click and do not even consider anyone's input. I also have a gut feeling they are cheating the system and crooked dealings are taking place."

Comments from those rating Excellent/Very Good:

"The improvements that have been made in Suissevale over the past 35 years have definitely build value. This is a very hard-working group of people that volunteer their time and efforts and to make Suissevale a wonderful place to live."

"They are active in the community."

"I've been on several HOA boards. It isn't easy, but I believe they are following the bylaws."

"Have the best interest of majority of owners, Spend countless hours each week making sure association is running as it should provide appropriate information to members while keeping confidential information private."

"They represent everything mentioned as being good stewards. The time and energy they put into making Suissevale a great community is vastly underrated."

"One can always do better. Our board does a fine job. They are volunteers driving to meet the vision and mission of Suissevale."

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A series of specific questions was asked of each respondent. They rated each question on importance and then provided comments. The questions and responses are reported below:

1. Dues:

Suissevale annual dues have been kept to a minimum over the past five years. The respondents were asked how important this was to them. Over **76% of the respondent** rated this as **very important**.

The following are examples of **comments made about dues**:

"until they can show me what our money is being spent on I don't feel comfortable having an increase."

"I'd like to have a better understanding of where our money was being applied and I would like it if we had a say in what is a priority."

"Membership not knowing financials and price adjustments through sales/purchases of properties for increased assets."

"I don't mind paying my fair share, but it would be good to have a say in how the money is spent."

"I don't want to pay more till the marinas start getting a turnover and the rest of us get a chance to use them."

"Great job BOD."

"Living on a fixed income."

"I feel we have overpaid for past mistakes of the Board like aborted water well field."

"I don't get much for my dues. We don't have a slip and have no chance of getting one. We don't use the beach as the clique has not been particularly welcoming."

"I think dues could be reduced if Suissevale was better managed and the marina was more fairly managed."

2. Association owned lots:

The association owns about 44 lots (Not widely known what the value of the lots are) and they are not listed as a POASI asset. Respondents were asked to rate how important it was to list this asset. There were **65% of respondents** who felt this was **very important**. (Note: POASI recently released a **list of owned lots shown [here](#)**. They were valued at \$1.7 million in 2019.)

The following were some of the **comments** made about **association-owned lots**:

"I would like to see the list of lots that Suissevale owns but they have not provided it."

"This is a large amount of parcels and amount of possible value which I was never made aware of."

"That is a bullshit question that it is not listed in financial statements. Look at what was provided at the last Annual meeting. How about asking truthful questions."

"When we asked, we were told they do not have a current list with appraisals by BOD."

"This is a major asset. It seems to be used as a way to balance the budget. Makes for lazy budgeting if lots can be sold to cover projects not budgeted."

"They are not transparent and sell lots when they need money. It's like their private slush fund."

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“Should be a balance sheet asset, so where is it and what is the explanation for its placement?”

3. Professional Audit:

The BOD has not undertaken an outside Professional Audit in at least the past 7 years and maybe ever. Respondents were asked how important it is to have a periodic Professional Audit. **Nearly 70 % felt having a professional audit was very important.**

The following are just some of the **comments** given about **having a professional audit**:

“We have to make sure everything is being done correctly and an outside audit could keep everything on the up and up. And make sure every member is paying their fair share and the spending is justified.”

“Transparency, transparency, transparency!!! I cannot state this enough. We who pay our dues are owed the right to know where our money is being spent.”

“Periodic professional audits are important for POASI. My experience is that they would take place every 8-10 years.”

“Audits are a professional part of business Checks and Balances.”

“Members should have confidence in the financial condition of the POASI. An audit would provide that confidence by getting an opinion from a professional CPA.”

“All smart businesses have audits to make sure there are no issues with those handling our finances whether institutions that serve us or inside POASI,

also to assess overall health and to insure that regulations of BOD members as they relate to non-profits are adhered to and BOD members have not been paid or profited in any way either directly or indirectly through family members, only an open and transparent auditing process can assure that. Also, to insure everyone who is benefitting from the amenities offered at Suissevale are indeed paying. We also want to make sure we have appropriate measures and procedures for selecting vendors and measuring their effectiveness etc. “

“An outside professional audit is very important as a safeguard for all of us.”

“HOA and rental fees should be able to cover those costs. Don’t see why this is not done on a regular basis.”

“That’s the government’s job, if they don’t like the tax return.

“We see the financial statements monthly. We don’t need to spend that kind of money.”

4. Five-Year Plan-Importance of community input:

Respondent were asked the importance of their being able to give **input on a Five-Year Plan**. **73% felt this was very important.**

The following are some of the **comments** made about **input on the Five-Year Plan**:

“It’s important for us to know what the BOD is looking to do with our money over the next 5 years”

“Why would our thoughts not be considered? Is this a dictatorship or is this our association? When is the board going to realize this is our Suissevale, everyone’s Suissevale, not the BOD’s Suissevale.”

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"Even though the Board is oversensitive to constructive criticism, participation is critical. i.e. \$100K could have been saved in the past after a water drilling project was found not to be viable."

"The 5-year planning is a very early stage process. It is premature to have members opine on this. It would be better if members would talk to people on the Board and convey what is important to them. This could then be brought up in an early planning session."

"This is OUR community, NOT the BOD. We ALL pay dues and have a right to participate in the planning of our community."

"Outside of POASI every other organization for which I have attended a board meeting has at minimum a 5-minute opportunity for Public Comment – typically at the beginning of each meeting."

"The BOD treats Suissevale as an oligarchy. We, the members, should have a say in how OUR money is spent."

"The 5-year plan should be developed over the summer when more of the community is available, BUT most of the community is not interested in

taking the time out of their valuable OFF time to participate. That is why we elect a board of directors."

"Feedback should be welcome."

"Any member that attends should have a voice."

"the members should have a voice on future financial expenditures. Planning in secret or refusing to allow questions or suggestions is not how a Homeowners Association should be operated."

"So only they get to vote on their 5-year plan? Do we know what they were discussing?"

"What is the point of having a board of directors or a meeting if they don't want feedback? How is everyone's interest being addressed?"

"It seems like a "No-brainer" to solicit 5-year planning input from the dues paying membership. The 5-year plan should not be based on a handful of what seems to be closed-minded individuals. Lack of inclusiveness."

"Input from members is critical to providing good leadership. Many members have expertise in areas that could be helpful in running Suissevale."

5. Legal Action to obtain POASI records:

Over 65% of respondents felt that community members should have access to POASI records (financial, Voter, etc.).

The following are some of the comments made about **access to POASI community records**:

"We are invested in the community and should be able to view these records. The BOD has put a process in place that we need to follow when asking for documents but most times we never receive a response. "

"Secrets breed distrust."

"These records are supposed to be available to community members. The board keeps losing these cases and it may increase the community insurance costs. This is not verifiable because...the Board will

not release the insurance policy. They cause all their own problems."

"We have a right to know why homeowners are taking legal action against the BOD. What have they done to drive members to take legal action against them? These are the people who are supposed to be looking out for the best interest of the community as a whole."

"Transparency. While there will always be a few aspects of business that require confidentiality for any board, those who commit to high levels of

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transparency will always have stronger organizations.”

“this community is run using our money. We should have access to viewing records. What are they hiding?

NOTE: Several **people incorrectly interpreted** that in recent legal action the Legal Petition was asking for a list of WHICH candidates voters had voted for. This is NOT true. The Petition asks the Board to reveal which ADDRESSES sent in completed ballots and WHICH addresses did NOT SEND IN BALLOTS at all.

No one was requesting to know which candidates voters voted for, only IF they voted or not. This information is readily available in national and state elections. Here are comments from those who seem to have misinterpreted the Petition:

“Do not want to have my vote decision public record.”

“It is private information.”

“Don’t need private personal information.”

“Voter records are private.”

6. Suissevale Water System:

This question stated that the BOD has been debating the fate of Suissevale water system for many years. It asked how important this issue was to the respondents. Not surprisingly, **70% of the respondents** felt this was **very important**.

Some of the respondent’s **comments on the water system** are as follows:

“This matter needs to be resolved ASAP.”

“The water issue is probably the biggest issue that will affect every member of this community. If the BOD has not been able to figure this out in the past 10 years, then maybe they are not qualified to make such an important decision.”

“Most pressing issue of all. We need expert advice going forward. Should be a separate committee of BOD and other not on the BOD – it is not a closed meeting subject.”

“The BOD has already spent \$130k with ZERO benefit to our community. That’s a lot of money for nothing...”

“The water situation is concerning. Somehow the current Board has decided they are in the water business. It’s difficult to have confidence that any of the current Board members know how to operate, maintain, and responsibly manage the financial aspects associated with providing the primary water

source for over 400 properties. They should not possess the ultimate authority over a primary utility.”

“Only the BOD has been working this because no one else will help.”

“I see no help from the membership.”

“Our water system is sub-standard and the method of paying for our water is not fair to those members who stay in Suissevale on a part-time basis. The part-time members are subsidizing the full-time members not to mention those who have automatic irrigation systems. Why should I have to pay for someone else’s grass watering?”

“the Board has wasted significant money chasing solutions to the water issues that are totally outside their area of expertise. It’s time to for some expert oversight.”

“This may be the single most important issue that POASI faces in the next five years.”

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7. Removal of a Board Member:

The respondents were asked if they think it was justified for the BOD to remove a board member who filed a petition to the court asking for a ruling on whether the 2019 Voter List should be made available to members. The Petition asks the Board to reveal which Suissevale ADDRESSES sent in completed ballots and WHICH addresses did NOT SEND IN BALLOTS at all. It does NOT request revealing which candidates voters selected. There were an overwhelming **75% of the respondents** who felt this action was **NOT justified**.

Some **comments** about **removing a board member** were:

"We should all have the right to view the voter list. Several members have asked for this and they refuse to produce it."

"Talk about shutting up dissenting voices. Her question is what I and others want answered."

"The Property Owners voted the member in. Removing said member because of what seems to be a difference of opinion and wanting certain information, but not personal, secure or protected information seems unnecessary and shows the BOD is afraid of information getting out to membership."

"We should have access to that information."

"In a democracy, voter lists are always available. The Board creates fear in the community as a tactic to get their way to avoid transparency and sharing knowledge."

"nothing to add. It was the right action. It's unimaginable that a Board member would do such a thing, and, trying to invade the privacy of members. Just awful."

"I think the way they removed the BOD member and the false information they stated for removing this member was atrocious. They sent an email stating that this BOD member was suing our BOD, which is absolutely false. This member was asking for the voting list and the BOD in usual fashion refused to give it to her."

"They were just looking for any excuse to remove this member, justified, or not. This was not justified in anyway. Conversely, they decided to keep a BOD

member who has missed more than six meetings which goes against their own rules."

"Voter records are private. Ginny overstepped her bounds."

"They should have provided the information without a court order."

"The member was elected by the people and cannot be removed because other members don't like the questions being asked."

"You're a BOD member, act like one and work out your issues. Not take Suissevale to court and cost us money and waste time."

"Again, they believe they have more authority than they actually do. The Board has a fiduciary duty to act in the best interest of the members. "

"The request of the court to give us guidance and to once and for all settle whether we as members are entitled to review the voter list should not be an issue and don't see why POASI is even opposing it. Let the judge provide the law of the land and then adhere to it. Strange that we have voting and no voting list. Very strange that a community has gone from a standard of 30- 50 votes per election to 300? Perhaps an audit there as well?"

"The board was asked several times over several months to provide a list of information that city and town governments across the country readily provide to anyone that asks. What are they trying to hide? A sitting board member (at their own expense) was forced to ask a judge to rule on whether the board is required to provide that information."

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Insurance Policy access:

8. Despite requests, the board has refused to let any member view the Insurance Policy which they say would be adversely affected if they are legally challenged. There were **62% of respondents who felt this issue is very important.**

Here are some of their comments:

"We as members have a right to see this policy! It appears they are hiding information from the association. What gives them the right to do this. They should be representing us. The problem is they all have been on the board for too many years. They think they can do anything without membership approval. We need a new board."

"Sounds like a ruse to keep legitimate information hidden. Information not forthcoming smells of corruption."

"Are the BOD the only members paying the premium? If not, then it is everyone's policy and should be open for viewing."

"It's our insurance policy, not the BOD plain and simple. More members should be questioning why the BOD function in such secrecy."

"If you're that nosy, just call the insurance company they can probably tell you."

"Bad info, its avail (sic) in the office."

"Sounds like a corrupt BOD to me."

"Transparency shows integrity. It's difficult to have confidence in the current Board's integrity to act in the best interest of the members at large when they don't provide access to documents."

"Why do you want to see the insurance policy?"

"Members pay for the association insurance so the policy should be accessible to the members. It is merely a document, a record, and can and should be shared with any member who requests it."

"Th board have backed themselves in a corner and is now scrambling to defend a bad position at the expense of the members."