

BQLC Questionnaire

1.) How would you improve communications throughout Bridlewood?

I would improve communications in our neighborhood by promoting on the Board the importance of sharing information with residents, expanding the types of communications shared, improving the current forms of communication, and introducing new methods of communicating.

Sharing Information with Residents/Types of Communications Shared

In order to be effective, the Board must be willing to share information with the residents. Understandably, there is some confidential information that cannot be released to the general public (e.g., detail about delinquent membership dues, release of members' personal information, etc.). As residents, we expect the Board to maintain our privacy and not disclose it. There is, however, a great deal of information that should be made readily available: HOA governing documents, to include Bylaws, CC&Rs, Rules and Guidelines; Board meeting minutes; financial reports and updates; specifics about ongoing issues confronting the Association; discussions with outside parties that are interested in doing business in the community; particulars about various subcommittee activities; etc. If elected, I would stress the need to communicate clearly and openly with the residents. This would help address concerns about lack of transparency and invite, not shut out, resident opinions. **Open communications is essential to successful Association governance.**

Methods of Communication

Even if information is available the perception is that it is not always easily accessible. To help with this, I would work to continue, improve and expand existing methods of communication as well as find new ways to share information.

The recently introduced Bridlewood Board Briefs and regular email blasts should be continued. They effectively provide short updates about Board happenings and upcoming events.

Our website should be improved so that it contains more information—such as static links to HOA governing documents, current and archived minutes, monthly budget report (including variances), updated map of the community and city, school information/news and links, direct links to club/organization points of contact, utility and local city links, etc.—is more responsive to residents (by providing a direct link to a general Board email address [“Ask a Board Member” link] and creating an open forum for online resident discussions [“Bridlewood Message Board”]), and supportive of residents (by offering links to resident business websites, information about homes for sale in the neighborhood, online bulletin board listing “for sale” items, recommendations, referrals, etc.).

Finally, the Board should reach out for resident input and tap into resident expertise to find new ways to deliver information. What about publishing a monthly, versus a quarterly or seasonal, newsletter? Can we get a dedicated column in the local newspapers? Is a local cable network a viable option? Some ideas may be possible, others unrealistic. Still, we live in one of the premier communities in the DFW area. By working together with interested residents, we can establish quality communications throughout our neighborhood.

2.) What is your opinion about creating an interactive web site that residents can access to actively communicate with each other and with directors?

I am wholly in favor of the creation of an interactive website for our residents. As I note above, the use of message boards/resident forums as well as direct links to the Board can help the Board be more responsive to resident needs and inquiries. The key to making these features effective is continual maintenance (e.g., Board members should respond in a timely—within one week, if possible—fashion to questions) and moderator supervision.

3.) Why do you think that less than ½ of the residents voted in the last vote? What will you do to increase the voting turnout?

Increasing voter turnout is a goal in every type of election. In the last Association vote and with the recent survey, the reason for poor resident participation may involve a number of factors: Busy schedules, did not know about the vote, could not vote in the time allotted, did not care or no interest in voting, etc. There could be a myriad of other explanations, and I think one way of addressing the concern is to ask residents themselves why. Understanding the causes of low voter turnout would provide solutions to the issue and focus on ways to improve the way votes are taken in the future.

Some of the ways I would increase voter turnout include the following: Opening up the timeframe, the window, to vote; allowing multiple and easier methods to vote (e.g., secure online voting, quick-response faxing, making proxies accessible and available online, etc.); communicating more information more often and in different ways (e.g., do not rely merely on mailings or emails, walk the streets, utilize block captains and/or neighborhood leaders to talk directly with residents); and finally, as mentioned above, continually soliciting feedback from residents (to keep them engaged in the goings on with the Association and to understand what worked, what did not work, and how things could be done better in the future).

4.) Do you support posting the HOA Board meeting minutes on the website? Please elaborate why or why not.

I am a huge advocate of posting HOA Board meeting minutes on the website. Again, as I noted above, effective communications is essential to successful Association governance. Minutes should be taken of every HOA Board meeting and they should be easily accessible for all residents. Moreover, an email summarizing what occurred at each meeting should be sent, with a direct link to the HOA website and detailed meeting minutes.

5.) Do you support posting monthly, quarterly, biannually, yearly, or not at all, treasurer reports on the website? Please elaborate.

Again, as noted above and for purposes of transparency, I strongly support making available all non-confidential HOA treasurer reports on the website. Furthermore, I would include not only the annual budget but variance-to-budget reports with detailed explanations for the variances. The bottom line: Residents are entitled to know how annual membership dues are being spent.

A word about the HOA budget and Association dues. First, in addition to making treasurer reports available for resident review, the Board could be more responsive by seeking input from residents to better understand the community priorities as determined by a majority of the residents. Second, the person charged with keeping the books should have financial training, experience, and expertise. Finally, the HOA is a million-dollar business, and to that end, it should be managed and treated like one. If elected I would push to make the budget available for residents through forums like the website, involve residents in the budgetary process, and vote for an experienced person to serve as the HOA Treasurer.

6.) How do you feel about committees being created to assist with the various needs of Bridlewood such as Quality of Life, Real Estate Values, Communication, Safety, etc.? And if you support forming committees, what would the first committees be and why?

In general, I believe it very important for residents to be included in the way Bridlewood is run. The Association has many willing, interested, talented, and experienced persons who can significantly and positively contribute to the community. Consequently, I am in favor of establishing various committees, as needed, to serve as adjuncts to the Board.

A few notes: Budgetary control is still the responsibility of the Board. And in cases where funds are required (e.g., to pay for mailings, info brochures, etc.), a formal process should be established to finance projects not included in the budget. Also, it is important to distinguish standing committees from shorter-term, specific-issue (or ad-hoc) committees. Standing committees, like the Landscape Committee, involve ongoing projects and serve as necessary advisors to the Board. Ad-hoc committees, like a Website Update or Communications Committee, may not be needed once a particular project is completed.

The initial committees, in my opinion, should address immediate resident needs and concerns. With feedback from residents to validate the community priorities, I would form the following:

- Quality of Life Committee, which would, among other things, focus on the issue of gas drilling and work to establish a protocol for action in the future;
- Communications Committee which would, due to recent concerns over how information is disseminated, review the way we currently share information and work to improve communications through an updated website (since this is project-oriented, I would establish a firm target completion date);
- Real Estate Enhancement Committee which would look at various ways to boost the value of our homes and the neighborhood (again, I would set a completion date for this committee); and
- Social Committee which would focus on ways to forge a stronger community among the residents.

Other committees could also be valuable. I would encourage the formation of these panels as needs arise but would ensure that we are not duplicating efforts or diffusing the ultimate responsibility of the Board to make decisions on behalf of the residents.

7.) Do you support or not support reviewing our Bylaws, CCRs and related documents?

a.) If yes: Would the board perform the review or would you support a committee to perform the review? How would you define your/their duties...i.e.: make suggestions to clarify, change, delete any needed line items, and/or ready a document for a vote by the Bridlewood HOA Members, etc.?

b. If no: please explain why you don't support a review.

As in the case of our local, state, and federal laws and statutes, I think it is healthy to periodically review the documents that govern the way we live. This is no less the case with our Association bylaws, CC&Rs, and rules and guidelines. So, in general, yes, I would support review of these and related documents.

Before embarking on this endeavor, however, I would ensure a few questions are first addressed. At a minimum, I would want to know the following:

-- Who will pay for the review? Will it come from the Association treasury? If so, have we properly budgeted for the project? Is the proposed allocation of funds worthwhile considering the priorities of the residents, i.e., are the residents in favor of spending their monies here rather than in other areas?

-- What is the scope of the review (all documents, just the bylaws or CC&Rs, or just specific articles contained within these documents)?

-- Who will conduct the review (all residents who are interested in participating, just "qualified" residents, who determines qualifications, do we use outside attorneys)?

-- If changes are proposed, how will the vote be conducted to ensure all residents are adequately informed of the proposals, understand them, and have the opportunity to vote on them?

-- And, finally, if changes are passed, how do we disseminate the results and ensure they are likewise understood and properly adopted?

Clearly, before a review is undertaken, given the resources involved, magnitude of the task, and competing interests and priorities, a majority of the residents must believe in its necessity and the above-mentioned questions should be adequately addressed.

For my part, if a review is conducted, I would not be in favor of open receipt of comments from the entire community—this would be too cumbersome to assimilate and cause problems outside of the actual conduct of the review. I would, however, back the formation of a specific legislative committee made up of interested and qualified residents, as determined by the Board. (Within our community, we have people who have experience with interpreting and drafting laws, e.g., lawyers, ordinance drafters, etc., and I believe they are the ones who should be involved with this process.) Duties should include separate review of each document as well as consideration of resident priorities. Finally, because these documents are essential to the running of the Association—in fact, they govern how we live in the community—I believe this is one area where we should consider consulting with legal experts.

8.) What is your position on gas drilling and what action, if any should the board take regarding gas drilling?

I am personally against gas drilling of any kind and if elected to the Board, I would fight to keep gas companies out of our neighborhood. There is enough in the literature that I've read to be concerned about its adverse affects on the health of ourselves and our children, our property values, and our general quality of life. Moreover, the survey results and the sheer number of residents attending the June Special Meeting make it clear that a majority of the residents feel the same way. Most are also against gas drilling and want something to be done about it **now**. I believe that the Board, as our representatives, has the responsibility to lead the fight. Part of the reason for my wanting to serve on the Board is to ensure that this already-apparent mandate is carried out.

How should the Board carry out this charge? I think it could do a lot of things: Get the community involved by establishing a task force of volunteer residents, go into talks with prospective gas companies with the Board/Association already positioned against gas drilling, be in the know with what is taking place in the city by attending local city meetings and working with other neighboring HOAs, influence lawmakers and local representatives.... In general, I believe that the goal would be to make Bridlewood an undesirable place for gas developers. If we make it clear that we are against gas drilling and will go to extensive lengths to keep it out of our neighborhood, gas companies will find somewhere else to go. And, why wait? It is prudent to develop a protocol now before any further talks with gas companies resume.

A general word about fiduciary responsibility.... I think that it goes beyond merely gathering opinions through one-time surveys. On gas drilling and other issues, I believe the Board needs to **educate** (by providing reliable, unbiased points of view), **communicate** the status and extent of our ongoing situation/discussions with outside parties, **encourage continual feedback** from residents as circumstances change, and then **take action** to carry out the wishes of the majority of residents. After all is said and done, and it is clear what a majority of the residents want, there should be no holding back. If the Board has done their job to inform, educate, and involve the residents, there should be no need to question survey results or wait for buy-in by those holding the minority view. All of these things are reasonable and could be done with minimal cost to the residents.

9.) Please describe one strength that you **have** and **how it would benefit the Board and why?**

My greatest strength—**leadership**—is embodied in what every soldier understands as the “Army Core Values”: Loyalty, Duty, Respect, Selfless Service, Honor, Integrity, and Personal Courage. These are lofty terms but they are what guide my decision-making and influence my approach to leadership. I always strive to act in the best interests of others. I respect my fellow leaders and those working with and for me. I give my best effort in all that I undertake. Even when the situation or considered move may not be looked upon as favorable, but necessary, I will step forward and let my support or concern be known. And, in all things, I try to ensure that integrity is a part of every decision.

My leadership style, honed after years as a military officer, business manager, and non-profit board member of peers, is collaborative and participatory. I do not micro-manage, but I lead, allowing those charged with specific duties to do their job and succeed on their own merits. My greatest successes, in fact, are when those who work for or with me are recognized by others for their efforts.

I will often offer guidance and reasoned, rational, and logical feedback to ensure the team maintains its focus and is not duplicating efforts or working at cross-purposes. I am systematic in my decision-making and believe it leads to sound judgment. Finally, my focus is on working as a team. In no way do I believe I act alone or as a single entity. I have a healthy, realistic view of myself and abilities and recognize that I am only as effective as those with whom I am serving. As a leader, I strive to emphasize the importance of working together so that individual team members embody the same belief.

So, with this leadership style, I believe I can help bring a new attitude to the Board. I believe that if the Board adopts this spirit of collaboration with the residents it will do much to improve general relations with them, allow buy-in and shore up support for actions that are taken, and lead to (perhaps) better, more efficient and creative solutions to the problems that challenge our current quality of life.