Assessment: Troon "Town Hall" — October 8, 2026

WHY Residents Were Disappointed with the Troon "Town Hall"

What a Proper HOA Town Hall Should Be

A proper HOA town hall concerning the selection of a new management company should be designed as an information-gathering and member-engagement forum—not as a staged presentation intended merely to ratify a decision the Board has essentially already made. This preserves the central premise of the original document. Troon Town Hall - Board Behavior

For Sun Lakes, the process should recognize three distinct roles which are described in detail at as the final section of this document:

1. The Board explains and listens.
2. Management-company finalists inform and answer.
3. Members question and provide input.

The Board ultimately retains its governing responsibility to select and contract with management, subject to the governing documents and applicable law. **But a meaningful town hall should have occurred so member questions and input can still constructively impact the transition process and adjustments to the agreement to adequately protect Sun Lakes' members**.

What the Town Hall Should Have Accomplished

Before the meeting, the Board should have clearly articulated why a change is being considered, what services the Association needs, what selection process has been used, the criteria by which finalists are being evaluated, and what stage the process has reached. **Members should have received sufficient information beforehand to ask informed questions**.

The town hall should have addressed management company philosophy, staffing model, on-site presence, experience with large active-adult HOAs, financial controls, technology, maintenance and facilities management, covenant enforcement, customer service, emergency response, Board-management boundaries, employee transition, references, contract terms, fees, termination provisions, and transition planning.

A Management Company Selection Scorecard should be published before the town hall so members understand the criteria being considered. Price should be one factor—not the deciding factor.

Town Hall vs. Board Decision

There is an important distinction between the town hall and a Board meeting called to justify its decisions.

The town hall is primarily for education, questioning, and input. The actual Board deliberation and decision should occur through the legally appropriate Board process. If a quorum of directors attends, Sun Lakes should ensure that applicable notice, agenda, and open-meeting requirements are properly addressed.

So How Did the October 8 Town Hall Compare?

The following comparison focuses on process. It does not depend on whether a member supports or opposes Troon. **The relevant question is whether the October 8 forum provided the transparency, information, and opportunity for meaningful member participation that a town hall of this importance should provide**.

1. Advance Information:

- Expected: Members receive advance information about the proposed management relationship and enough background to prepare informed questions.
- Observed: **No advance summary information was provided** explaining what the proposed management agreement offered for the benefit of Sun Lakes' members.

2. Scope of Member Questions

- Expected: Members can ask relevant questions about the selection process, proposed services, operational impact, governance relationship, and transition.
- Observed: At the beginning of the meeting, the Board President announced that questions had to be submitted in writing and were limited to implementation and Troon corporate background. When Burkel decided to curtail further questions, he abandoned the established protocol and allowed members to come up to the podium to ask their questions. By this time many members had lost interested and left the meeting. **Burkel intervened in the questions selection process intended for Troon by partially answering or ignoring them resulting in confusion rather than clarity**.

3. Handling Member Questions

- Expected: If questions are consolidated, the process is neutral and intended primarily to eliminate duplication or keep the discussion relevant.
- Observed: **Board members Tasko and Katz screened the box of questions submitted before they were returned to General Manager Chris Mitchell. Eight of the ten questions submitted by Sun Lakers for Accountability were not among those subsequently asked**.

4. Follow-Up

- Expected: Questions that cannot be answered at the town hall are given a clear follow-up process and timeframe.
- Observed: **The Board President stated that questions regarding the selection process or the Troon agreement would be answered at another time, but no specific date, forum, or follow-up procedure was identified**.

If the purpose of a town hall is meaningful member engagement, **the exclusion of questions concerning the selection process and the proposed management relationship raises serious concerns** about transparency, accountability, and whether members were given a meaningful opportunity to evaluate one of the most consequential management decisions affecting Sun Lakes.

A Separate Governance Concern

Following the town hall a member(s) observed Director Katz removing Board-authorized "Vote YES to Recall Burkel" materials and supporting flyers from the designated location. Reportedly, Sun Lakes' video

surveillance footage confirms that Mr. Katz removed the literature. It is uncertain what consequences, if any, might follow.

Members are entitled to an explanation of what occurred and what standards the Board applies when a director interferes with member political communications permitted by the Association.

The Larger Question is not whether members agree or disagree with the selection of Troon. **The question is whether the process used to select a management company—and the manner in which that decision is presented to members—meets the standards of transparency, accountability, fiduciary responsibility, and meaningful member participation that Sun Lakes should expect from its Board**.

Members should ask themselves:

- Was sufficient information provided? Were legitimate questions permitted?
- Was member input genuinely sought before the decision was effectively complete?
- Were all viewpoints treated fairly?
- And has the Board adequately explained the basis for one of the most consequential decision it will ever make?

Every Sun Lakes member, regardless of his or her position on Troon or the current Board, has an interest in the answers.

Good governance does not require everyone to agree with the Board's decisions. It does require a process worthy of the members' trust.

Further information on how the "Town Hall" should have been conducted.

Specifically, the Board's role, Troon's role, and the Members role are clearly defined as follows:

I. Role of the Board

Board members should principally be facilitators, fiduciaries, and listeners. The Board president or a neutral moderator should explain the purpose, process, and ground rules. The Board should resist dominating the discussion or using the forum to advocate for a preferred outcome.

At the conclusion, the Board should explain exactly what happens next: what additional due diligence will occur and how member comments will be considered.

II. Role of the Management-Company Representatives

Members should hear answers to practical questions such as:

- How would you handle disagreement with the Board?
- What happens when an individual director attempts to direct staff?
- How do you advise a Board that wants to take an action management believes conflicts with governing requirements?
- How do you track Board directives?
- How do members escalate unresolved service problems?
- What financial controls prevent unauthorized expenditures?

- How will you measure your own performance?

Those questions reveal considerably more than a marketing presentation. Troon Town Hall - Board Behavior

III. Role of the Members

Members should be participants, not spectators. They should receive advance information and be encouraged to submit questions before the town hall as well as ask questions during it. Questions may reasonably be consolidated to eliminate duplication, but they should not be excluded merely because they are difficult or uncomfortable for the Board or a management-company representative.

Members should be encouraged to focus on the future management relationship rather than turning the meeting into a referendum on personalities or a grievance session about existing management.

IV. An Additional Safeguard for Sun Lakes

Before the town hall, members should receive a simple comparison sheet using the same categories for every finalist. The decision should not be reduced to quoted management fees.

For a community as operationally complex as Sun Lakes, an inexpensive management contract can become costly if it results in weak financial controls, poor project management, inadequate staffing, high turnover, poor resident service, or weak governance support.

After the selection, the Board should have published a concise Selection Rationale explaining the criteria considered, the process followed, the principal reasons for the choice, anticipated transition arrangements, and how the new management company's performance will be evaluated during its first year. Not at the end of the first year.