



CANDIDATE STATEMENT FOR HERITAGE RANCH OWNERS ASSOCIATION BOARD OF DIRECTORS

My name is Marc D. Coons, and I am excited to announce my candidacy for the Heritage Ranch Owners Association Board. As a resident of Heritage Ranch for 12 years, I have grown to deeply appreciate the unique charm, and the quality of life Heritage Ranch offers. I am passionate about ensuring that our community remains a wonderful place to live, and I am eager to contribute my skills and experience to the board.

PROFESSIONAL BACKGROUND:

I bring to the table a background in finance and management. As a mortgage lender, I have extensive experience in managing complex financial structuring. This role has equipped me with critical skills in budgeting, strategic planning, and conflict resolution. These skills will be invaluable in addressing the challenges and opportunities facing our community.

HROA INVOLVEMENT:

Although I am new to the political arena of Heritage Ranch, I believe this fresh perspective will bring innovative ideas and approaches to the board. My enthusiasm and commitment to our community drive me to make meaningful contributions and advocate effectively for all residents.

VISION FOR HERITAGE RANCH:

- 1. ENHANCED COMMUNICATION:** I believe in fostering open lines of communication between the board and residents. I will work towards creating more opportunities for community feedback and ensuring that residents are well-informed about board decisions and community events. Transparency is key, and I am committed to providing regular updates on active and future projects, so residents are always aware of what is happening and what to expect in our community.
- 2. FINANCIAL RESPONSIBILITY:** Maintaining our community's financial health is a top priority. I will advocate for prudent budgeting, cost-effective solutions, and long-term financial planning to ensure that our resources are used wisely and sustainably. A key aspect of this is addressing our dwindling reserves. I will prioritize strategies to replenish our reserves, ensuring that we have the necessary funds to manage unexpected expenses and invest in future projects that enhance our community.
- 3. AMENITIES AND INFRASTRUCTURE:** I am committed to preserving and maintaining our shared amenities and infrastructure. While regular maintenance is essential to ensure these amenities remain safe and enjoyable, I will advocate for upgrades only when financially prudent. This careful approach will ensure that we enhance our community amenities without compromising our financial stability.

WHY VOTE FOR ME:

I am dedicated, approachable, and driven by a genuine desire to serve our community. My background equips me with the knowledge and skills to make thoughtful, informed decisions that will benefit all residents. I am committed to representing your interests and working collaboratively to make Heritage Ranch an even better place to call home. Thank you for considering my candidacy. I look forward to the opportunity to serve you and to work together for the continued success and prosperity of Heritage Ranch.

Sincerely,
Marc. D. Coons

A large, stylized handwritten signature in red ink that reads "Marc D. Coons".





2024 Candidate Submission

Name: Scott Keller

Property Address: 9681 Nacimiento Lake Drive

Lot/Tract: 25/20

Account / Member #: 1311M

Brief biography:

I am a retired CPA, with a bachelor's and master's degree in accounting. I started my career working for a national accounting firm in Orange County before moving on to run several multi-million-dollar companies as well as owning my own business. I have served on several types of boards including the HOA for my previous home in Southern California. I currently sit on the board of a 100-million-dollar company in LA and successfully navigated them through the economic downturn due to the pandemic. Additionally, I have been the General manager of Le Vigne Winery here in Paso Robles for the past 7 years. I have had property in Heritage Ranch since 1983, becoming a full-timer 20 years ago. My kids grew up in this piece of paradise and now my grandkids are here too.



Candidate Information Statement:

My name is Scott Keller, and I am running for the HROA board because we are in danger of losing our community unless we can turn around the dire financial situation that has been brewing in our Association for years.

I believe it will take at least one person with an extensive background in business and accounting to help educate and facilitate our board, management and our community to a healthy and successful budget and reserve account.

I believe I am that person, and I can make a difference. Let me first tell you about myself.

I have had property in Heritage Ranch since 1983, becoming a full-timer 20 years ago. My kids grew up in this piece of paradise and now my grandkids are here too. I am a retired CPA, with a bachelor's and master's degree in accounting. I started my career working for a national accounting firm in Orange County before moving on to run several multi-million-dollar companies. I have served on several types of boards including the HOA for my previous home in Southern California. I currently sit on the board of a 100-million-dollar company in LA and successfully navigated them through the economic downturn due to the pandemic.

Since my recent retirement, I started attending our HROA meetings. They really started to get my full attention when this year's budget and fees came into focus. Our reserves funds are meant to repair or replace long-term assets (i.e. Rec Barn, Roads, culverts, etc.) A reserve audit determines the useful life of our assets and estimates the cost to replace them at the end of their life. The estimated replacement costs is the fully funded balance. After a little research I found our Reserves in June of 2022 were 40% funded with a fully funded balance of \$4,810,377. In June of 2023 our fully funded balance went to \$10,848,972 and we were only 20.9% funded. At the board meeting on 5/30 we were notified the HROA is now only close to 17% funded. It is obvious we are going in the wrong direction, and this is not something that happened overnight. It has been a long history of poor monetary policy and finance control. Without righting this ship Heritage Ranch could be taken over by the state and we would loose everything we love about this place

I have a daughter with a young family that also lives in Heritage Ranch, and I am very concerned about this place being affordable for them as well as the future generations of many homeowners in Heritage Ranch.

We are not the government so we cannot print money. Like any for-profit business we need to live within our means and adequately plan for the future. Businesses need a number of skill sets and finance is one of the most important ones. I believe I bring those skills to the to get this association back on track. I have made the tough and unpopular decisions before, and I will make them again. But in the end the HROA will be on track to becoming a viable organization again.

I stand for honesty, transparency, and informed decisions. I will help prioritize and implement our projects. I believe with my education and experience I can make a difference.



2024 Candidate Submission

Name: Lisa Ptaszenski

Property Address: 5027 Northfork Place, Paso Robles, Ca

Lot/Tract: 55/693

Account / Member #: 1260M

Brief biography:

Candidate Information Statement:

My name is Lisa Ptaszenski

I would appreciate being considered as a Candidate for Heritage Ranch Owner's Association Board of Directors.

We have owned property in Heritage Ranch since 1999. We have lived here full time since 2011. My husband (Jim) and I raised our family in Westlake Village, CA. We have two sons Sean (lives at Heritage Ranch) and Ryan (lives in Thailand).

- I worked for a large new home developer in Newport Beach for 11 years before becoming a mom. I worked in offsite construction (sewer, storm drains, as well as processing all utility development and permits for the new developments), I have many, many years of construction experience.
- I worked in property management for The Emmons Company for 10 years.
- I was the Chairman of our Architectural Committee for 10 years while living in First Neighborhood, Westlake Village.
- I went back to school and got my Interior Design Degree in 2000. I worked for Bagwell Construction in Moorpark as a construction/design consultant. I was the person responsible for all design, bidding, contracts and overseeing of new construction builds for them.
- We have owned and worked in our own produce company in downtown Los Angeles since 1989.
- I stopped working for Bagwell to help Jim with our produce company. I handled all HR, payrolls, licensing, accounting staff etc.
- We sold our produce company in 2012 and built CP Farms (a lavender and olive farm) on one of the 20 acre parcels in Heritage Ranch. I'm sure I met many of you at the farm! We built that farm from the bottom up from scratch, sold it in 2021 and live inside the ranch (proper now). We love owning less land!

Why I am running for the board: In my opinion, one of the biggest negative issues here are the rumors and mistruths that are spread around like wildfire. One of my goals would be to help improve communication between the board and members. I believe we all should know all the facts as members. We cannot make informed decisions without facts.

I have already heard the untrue rumors about me, stating that I am only running for the Board because I'm a Pickle-ball player. The truth is, I am a Pickle-ball player, however the Pickle-ball courts are just one of the amenities that has not been maintained properly. We should all care about all of our amenities whether we choose to use them or not. Maintenance for all amenities is a must. Pools, tennis courts, basketball courts, pickle-ball courts, roads as well as all other association maintained amenities must be maintained in a timely manner to save the association money and keep the values up for highest resale values possible.

We all are aware that we have financial problems at HROA. Ignoring this will not help Heritage Ranch nor any of us with our property values or the existing amenities on the ranch being maintained in a timely manner for optimal life span. The longer we are in a state of disrepair on our amenities, the more they cost to repair.

Most of us consider our properties to be our biggest asset. I hope to help to improve our values by maintaining the ranch in its entirety. In my 25 years here, I have seen much on the ranch. I have lived inside and outside the gates and have experienced the differences there. I am now 100% retired and would like to give my time to help Heritage Ranch and all of our members to feel positive about where we live. Thank you for your consideration.





2024 Candidate Submission

Name: Keith Roberts
Property Address: 9990 Flyrod Drive
Lot/Tract: 78/1910
Account / Member #: 2289M
Brief biography:
Keith Roberts
9990 Flyrod Drive
Paso Robles, CA 93446

My name is Keith Roberts, and I am running for the 2024 ABC HOA Board of Directors. Working as a team, we can accomplish everything that makes Heritage Ranch the place we want to be. It takes a village to make it happen.

Those that know me know I am a 18 year resident recently retired from a 48 year career in the vineyard/wine industry. I am married to Laurinda who worked at Cappy Culver with many of you or your children for many years. We have been together since 1978. We have three children, Jason, Joshua & finally, Annie. Retirement has been great, learning how to play new sports together has been incredible, traveling to new parts of the world has been marvelous, and catching up on projects around the house is simply the best. Meeting new friends and visiting the old is precious.

Back to my career and background. What makes you consider me a quality person to vote for in this election? I have created and managed budgets of multi-millions hitting targets within 5%. This includes work, agriculture organizations, and as a public state appointed grape rootstock commissioner. I am also trained and certified in Six-Sigma, a LEAN manufacturing practice of problem solving with root cause analysis and finding ways to be better. Here is a summary of what I did in my years prior to retirement:

- 1974-2023 Wente Vineyards California, supervisor, manager, Sr. manager, Director of Vineyards, and Viticulture.
- President of Ag Task Force
- President of Grape Growers Ass. Monterey County
- President of IGA
- President and Chairman of SVWC
- Commissioner on Grape Rootstock Improvement Board

The goals of our community should be sustainable. They should be from the heart of the customer, owners of this community. My only goal is to make our community a place we all want to live in. Getting there requires understanding how things are run today as well as how they were. This is the only way we can go forward sustainably. Listening to you is vital. Taking time with our workforce to understand what they do and how we can make them better helps us all make decisions that are in the best interest and aligned to the goals we as a team create. Creating a bottom up not top-down think process will assure we vote with harmony not worrying if we did the right thing. I like to pull thoughts not push them.

Thanks for your support and consideration. Please vote for me in this election. Thank you in advance!

Sincere Regards,

Keith Roberts

(831) 901-1219

keithfocusfarming@gmail.com

June 1, 2024



Candidate Information Statement:



2024 Candidate Submission

Name: Martin Rowley

Property Address: 2459 Barn Rd, Paso Robles, CA 93446

Lot/Tract: 64/1094-2

Account / Member #: 2063M

Brief biography: As a homeowner of Heritage Ranch since May of 1998 I share with each of you the desire for a wonderful peaceful place to live and to create great memories for myself and family. For 15 years I was employed and dedicated myself to Heritage Ranch in various positions such as support of the infrastructure while maintaining day to day operations including gates, computers, set up of Board meetings and security camera's running efficiently. During my employment at HROA I've shown willingness to work with all departments, its employees as well as multiple General Managers which demonstrated the dedication I have for our community. The partnership I had in 2011 with San Luis Obispo and Monterey Counties to develop and implement a working Mussel Program which is now the foundation for today's lake safety here at Heritage Ranch. I left the employment with the HROA in November of 2022. Couple this with my volunteer work in many areas including as a member of our Marina Committee to insure our work in making boating a fun and enjoyable experience as evidenced by smooth launching and a shuttle service during the busy holiday weekends. Also serving as a former member of the Heritage Ranch Water District's Board, gives me a keen insight as to what our community members expect from its elected Board Members



Candidate Information Statement: My vision for Heritage Ranch is the well-being of existing and future residents, sound future development planning and ensuring the priorities of our board are to manage our rules and regulations, coupled with common sense solutions. Those of you that know me know I don't and won't have a personal agenda of self serving decisions and will perform for you with the upmost ethical, unbiased and honest resolutions to Heritage's challenges. No false promises to individuals or groups of individuals in an effort to be the most popular Board Member. I am a proud former serviceman having served our county in the US Army from 1961 to 1964. Following my service I have taken positions with organizations such as EG&G, RCA, Fairchild Semiconductor and Intel with increasing knowledge and responsibilities in electrical engineering. It would be an honor to receive your support and be elected to your Board of Directors this upcoming election cycle, I promise to work hard to bring some civility and common sense back to our community.

PLEASE VOTE FOR TOM SWANSON FOR HROA BOARD OF DIRECTORS

Dear local Heritage Ranch Community members,

INTRODUCTION – “OPEN, HONEST, AND COMMON SENSE”

I’m Tom Swanson—Heritage Ranch resident since 1994 and current homeowner. I’m currently an Assistant Chief with CAL FIRE overseeing North County Operations and programs. I plan to retire at the end of 2024 after a 28-year career. My wife, two sons and I have no plans to move because our community provides so much of what we love and how we want to live. I hope to gain your HROA Board vote to help make smart decisions that serve residents and build upon all that makes this community what it is. A vote for me is a vote for common sense and financial accountability.

EXPERIENCE – “DIVERSE AND RESOURCEFUL”

I want to utilize my work experience skillset to collaborate, cooperate, and coordinate with State and County resources to enhance the safety and security for our lake community. We can work with our County Supervisor to seek Paramedic staffing at Station 33 instead of just EMT and have it paid by the County General Fund rather than a property tax assessment. As the budget allows, we should switch to RFID stickers on windshields rather than the decals to improve emergency vehicle access and harden overall security. A timelier weed abatement program is a must as homeowners’ insurance is skyrocketing. I’m very familiar with the pros and cons of Contracting services such as gate or patrol staff which is being discussed. Some contractors can even negotiate hiring of existing staff to prevent any loss of local jobs. I have worked with various city councils, CSD’s, and special districts. I’ve seen how various boards or councils navigate through strong public opinion to make hard, unpopular decisions such as budget cuts. I understand the importance of how a board can achieve success through being cohesive and decisive.

MISSION, VISION, AND VALUES – “TRANSPARENCY AND ACCOUNTABILITY”

The reserve fund needs to be properly funded to access funding for emergency repairs and prevent state involvement which would increase costs. This can be accomplished by creating a strategic plan and a replacement budget cycle to reduce unplanned spending. I will prioritize deferred maintenance of our roads to prevent costly repairs in the future. A competitive bid system must be utilized for all major projects. My goals are to maintain transparency in all decisions that influence financial and regulatory policy or guidelines in the rural lake community in which we live. As a Member of the HROA board, I will approach decisions with common sense and thoughtful financial judgment. I want to maintain the sense of freedom we enjoy as a rural north county lake community and will not endorse any further rules and regulation that do not meet the needs of us as local citizens.

COMMUNITY AND COMMUNICATION – “PRIDE AND INTEGRITY”

Open communication should be promoted between staff and the membership. Our best resource is the knowledge of the residents. Our board needs to ensure the General Manager maintains a strong relationship with Monterey County. This could produce a longer “Point” lease term for less, increased access, and approval for additional slips. Open dialogue with the Oak Shores GM and Board President could provide the intel for more cost-effective operations than trial and error. We need to embrace local organizations such as NRWMAC that work to maintain our property values and livelihood. I look forward to engaging the numerous volunteer committees for the Marina, Finance, ESC, and AEC to ensure all your concerns are addressed with a fair and consistent process. I want to support the local Youth livestock center, equestrian, church youth group and activities such as concerts in the park which can serve as a fundraising source for our community center. I would be honored to have your vote and would serve our community with pride and integrity.

Very Respectfully, Tom Swanson





2024 Candidate Submission

Name: Masen Yaffee
Property Address: 3455 Catalina Place
Lot/Tract: 211/1990
Account / Member #: 2557M

Brief biography:

My wife Barbara and I, and our kitty Henry, are residents of the Ranch for over 8 years. We love living here and want to see the Ranch run as efficiently and effectively as possible for the benefit of us all. I have been a small business owner on the central coast for over 30 years. I'm passionate about wakeboarding and enjoying the lake life. I also love mountain biking, flying small planes, and reading.



Candidate Information Statement:

As a small business owner, I have experience hiring and leading teams, which is critical to the success of any organization. I was the president of another homeowners association for over 10 years where I lead and helped complete numerous projects. I am also currently in year 2 of serving on the Heritage Ranch Community Services District board where I've helped to bring about greater collaboration and a more cost-effective wastewater treatment plant, saving ranch residents more than \$12M in fees over the next several years.

As a Heritage Ranch Owners Association board member, you can count on me to dig in and take the time to learn about the issues that need to be addressed, listen openly to all sides, communicate frankly and with the intention to create consensus, and cast my votes in a thoughtful and measured way.

While raising dues may in fact be necessary in order to fully fund our reserve and address other issues like the maintenance backlog, before we do that, we need total accountability and clarity in the Ranch's expenditures. There are too many unanswered questions about where money is going. Until we create this clarity, we won't know how much money we really need moving forward.

Another critical issue for us is staffing. We need the right people in the right seats and they need to be trained and managed to the degree that the organization runs like a well-oiled machine. We are overpaying on some of staffing and underpaying in others.

To solve these issues, I'm committed to putting systems and processes in place that enable total clarity with regard to income and expenses across all areas, and the staff accountability to ensure those systems are used. I would also be focused ensuring that our staff has the know-how to hire, train and lead people in a way that gets results. That's not only about holding people to task, it's also about creating an environment where people enjoy working and want to give their best. That means a workplace where people are given training and growth opportunities, are appreciated, are given opportunities to make a contribution, and are able to discuss issues openly and without fear of repercussion. I know how to create and lead high performing teams and I'd like to bring that know-how to our board and staff.

To me, being a board member of the HROA is essentially a volunteer, community service position. It should be undertaken with a single agenda - to give of our time and whatever skills we have for the betterment of our community. I have the time and willingness to serve and I believe I can make a positive contribution. I would appreciate your support.