



**Southern Village Homeowners Association
Manager's Report
April 30, 2018**

Financials

The March Financials were reviewed on Thursday, April 26th by Jerry, Tara & Tony. They have since been posted on the HOA website. Additionally, the 2017 HOA tax return is finished, has been reviewed (with Jerry) & has been filed with the IRS. As a reminder, John Chung is the tax preparer for the HOA.

Next, a master budget & reserve file has been created by Berkeley. It has been shared with Jerry for next steps. Also, on Thursday, April 26th it was reviewed (at a high level) with Jerry, Steve & Tony. Next step is for Jerry to present the file to the Board at the May meeting & then formally kick-off the FY19 Budget in late summer (so most likely Aug/Sep). The goal is to close the budget by early December.

Last, the audit of the 2017 financials has formally begun. Requests for information started flowing from Berkeley to the auditors on Tuesday, April 24th. As of today, all requests have been completed. As a rule, Berkeley will respond to all audit requests within 16 business hours.

Work Orders

Since the last report 13 work orders were opened & 10 work orders were closed. As always, if any HOA member (include the Board) wants to see the work orders they are available in the Berkeley office. Also, as part of a new process, Berkeley is including some information on work order as part of this report.

Landscaping, Street Trees & Ponds

Ruppert is now doing all landscaping for SVHOA. This change as effective April 1st. At present they have an approved contract ending on 12/31/18. The contract is for all SVHOA common areas, including the recycling centers and dog waste stations. The contract is also for TH1, TH2, Westend, Highgrove & Courtyard. The contract is for basic landscape services & annual mulching. As of this report, Ruppert is now servicing the property on a weekly basis, weather permitting. Weekly reports are shared with Berkeley staff (specifically Patsy). Upon request we are very happy to share those reports. Additionally, Berkeley staff personally walk the property weekly to follow up to ensure Ruppert is doing a good job.

Bartlett continues to service all street trees for the HOA. In April Bartlett did not do a lot of work, other than clean up from recent storm. Whenever Bartlett does work they send a service report to Berkeley (Patsy). Starting in June, Bartlett will be treating for insects and other pests that are affecting some of the street trees. Of note, Patsy did ask Bartlett to monitor some new trees planted on Hillspring Lane.

Dragonfly Pond Works has completed the remediation project (which was finalized last quarter). They continue to service the property monthly. They provide month reports to Berkeley (again Patsy), which we post on the community website for all to see. All 2018 reports are posted now.



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ARB

All approvals and denials of ARB submissions are posted on the community website. Additionally, formal communication goes out from the ARB chair, as well as Berkeley, about all applications. Finally, for anyone looking for a complete history of ARB approvals please know the community website has information, by month, going back to early 2010.

Michelle continues to serve as the primary contact for Gregg (ARB chair) on a daily (or weekly) basis.

Special Projects

Courtyard Homes interactions has become a huge special project for Berkeley in 2018. As a reminder, several hours of work went into a resident meeting in February to discuss all things Courtyards. At the time, two Board members (Steve & John) also assisted in the preparation & running of the February meeting. Information was posted on the website about this meeting both before and after it happened. The best thing that came out of the meeting was that one person would volunteer to represent all Courtyards to both the Board & Berkeley going forward. Unfortunately, after about six weeks, that person changed their mind & stepped away from the role. Fortunately, Dianne Yardley immediately stepped into that role. At the same time all the work invested by all the stakeholders had to be redone so that Dianne could get up-to-speed on all issues. Tony has personally spent 10+ hours helping to education Dianne. Patsy & Ruppert staff have also been involved in discusses & one face-to-face meeting. As of this writing, it does appear Dianne is fully up-to-speed on all things Courtyards.

One other note on Courtyard Homes & landscaping services, it does appear that some (not sure if it is a majority yet) are not 100% convinced they are getting a good value for their dollars as it relates to the weekly mow, edge, blow & go services. Tony was asked to do some research on what basic landscape services would cost for a de-attached home in Southern Village. During the month of April, Tony got several quotes & spoke to several Southern Village residents (asking them what they are paying). The general range of pricing was \$30 to \$45 per week for basic services (meaning weed control, pruning, mulch, etc. would be extra). Most yards in Southern Village need service at least 40 weeks per year. Thus, the annualized rate is between \$1200 & \$1800 per home (again before any extras are included). Tony did get one firm quote for "all in" services, which was \$225 per month or \$2700. As a compare point, present Courtyard Homes dues are \$500 per home per year for "all in" services.

Roofwerks is finishing roof inspections at Townhome I. Per their inspection the roofs need to be replaced within the next 12 months. Berkeley has an estimate for such & will bring to the May Board meeting. Additionally, the budget/reserve worksheet (v1.5) already has this information added to it. Additionally, as of this writing Roofwerks is looking at the roofs at Townhome II. Once we have their formal recommendation it will be shared with all interested parties. Finally, Roofwerks inspected the roofs for both Highgrove Townhomes and Westend Townhomes and deemed they will easily last another 5 years. This is good news and has been communicated to Susana, Jerry & Steve.



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Special Projects (continued)

As previously mentioned, 3 new dog waste stations have been installed around Southern Village. Ruppert is collecting waste from them on a weekly basis at no charge to the HOA. Berkeley has received nothing but positive comments on these new stations. In fact, most residents are asking for even more to be installed as budgets allow. Adding a new one near Market Park would be ideal for residents.

Pond improvements is a new special project that will be discussed in more detail at the next Board meeting. Right now, Susana is leading that effort, with support from some residents. Additionally, Dragonfly staff will be attending the May Board meeting to speak directly with Board members on their thoughts on how best to proceed. One other note on ponds, as of today there is a no mow rule in effect for all vendors working around the Southern Village ponds. Specially, this means Ruppert will not mow within 4-6 feet of any existing pond. Additionally, Dragonfly has been asked to not mow at all.

Asphalt Enterprises has completed all work associated with their spring report on needed repairs on SVHOA owned alleys. The work was approved at the March Board meeting. The actual work was done in the month of April (note, it spread out a bit because of the rain). As of today, all work is done.

A special e-mail account has been setup for SVHOA Board President(s). The e-mail will be passed down from President to President to use as they see fit. Address is: president@southernvillage.org.

New Board member, Susanna T. (not to be confused with Susana D.) was trained at a recent work session at the Berkeley office. Additionally, Susanna T. has stopped by the office to pick up some important handouts that she requested. Good news is Susanna T. will be ready for the May meeting.

Complaints

Since December 2017, 15 formal complaints have been logged by Berkeley staff. Of those, 3 remain open pending resident action. Please know Tony shares the complaint report once per month with Susana D. via e-mail. Additionally, he will bring a printed copy for all Board members to the May meeting. As always, Berkeley closely watches the open complaint list & follows up aggressively on all issues (so they are completed in a timely manner). Not that Berkeley ever wants to fine a resident, but it is good to note that if a person ignores letters from the HOA to make corrections to their property the HOA is well within its rights to (1) fine \$75 per day until resolved or (2) fix & then bill the resident.

Action Items

Since the last Board meeting (late March) 50 action items have been formally logged between Tony & Susana D. to keep track of (so that nothing is lost between Board meetings). As of today, 33 items are now closed, with 17 remaining open. Anything that is open by the May Board meeting will be discussed with all Board members. Note, some action items are long term in nature (ex, creating & rolling out a new community website) & thus cannot be closed in a short period of time.



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Website

The current website continues to be maintained by Berkeley for a flat fee of \$180 per month. Additionally, Susana D. has kicked off a project to create a new and better website. Berkeley is 100% supportive of this effort and looks forward to helping more as it comes on line.

Additionally, monthly Berkeley sends out 2-4 e-mail "blasts" (or more properly called electronic newsletters). They are sent to anyone that has signed up for e-mails from SVHOA. The current subscriber list is over 3000 e-mails. Of which all are vetted as confirmed & in active use. What is interesting, whenever an e-mail is sent out only 10% of those receiving it actual click on the e-mail.

Insurance

Luke, Jerry & Tony are already discussing the SVHOA insurance renewal. The policy is up for renewal in July, so the plan is to start working together in June on a formal renewal plan. As was the case last year, Luke will shop around for the best rates & then make a recommendation to Jerry. At that point Jerry will guide us all on next steps. Note, early indications are that rates will be up less than 5% from 2017.

Roles & Responsibilities

Berkeley staff have updated the document concerning roles & responsibilities for SVHOA & Berkeley staff. This update document is now posted on the community website. Also, it has been shared via e-mail with all Board members. Of note, it has also been shared with the financial auditor.

Next Board Meeting

The next HOA board meeting is scheduled for Monday, May 14, 2018 at 6:30pm. It will be held in the conference room at 101 Market Street. The meeting agenda will be send out via e-mail 7 days prior.



Work Orders Opened Since March 22, 2018

<u>Address</u>	<u>Item</u>
Market Park	replace 3 swings
900 and 1000 Highgrove riser rooms	necessary repairs after inspection
Highgrove Townhomes	gutter repairs
202 Brookgreen	replace drain pipe
204 Greenview	loose drain pipe
107 Westside	rotten handrail
Market Park	replace gate latch
Edgewater and Highgrove Parks	sand and seal benches
Calderon Park	add lock to water faucet
Scroggs Pond	replace gate
531 Copperline	roof leak
208 Brookgreen	rotten wood
Near Edgewater Park	tree down