



**Southern Village Homeowners Association  
Manager's Report  
November 13, 2018**

Financials

Monthly financials were reviewed & approved by Jerry. Per Board instructions they are no longer posted on the community website. However, they are available by if requested by an HOA member via e-mail to [manager@southernvillage.org](mailto:manager@southernvillage.org). Additionally, earlier in October the Board reviewed the 1<sup>st</sup> pass on the 2019 budget. The Board will vote formally on the 2019 at the November meeting. Finally, Tony created long range financial plans (ex, 5 years or more) for all accounts & shared with both Susana & Jerry for review. Tony suggests that future Boards look at spring time for reserve discussions & fall time for annual budget discussions.

Work Orders

Since the last report 1 work order was opened & 1 work order was closed. As always, if any HOA member wants to see the work orders they are available in the Berkeley office. Also, Berkeley is including some basic information on work order as part of this report.

Landscaping & Ponds

Parks, Common Areas: Ruppert continues to service the property weekly for mowing, edging and blowing. The crew completed fall pruning/sheering. Additionally, fall aeration & over seeding is now complete. Additionally, the irrigation system at Central Park is turned off & winterized. Ruppert has shared their formal plan, with timeline, for the approved common area pathway improvements scheduled for late 2018 & early 2019. Additionally, an on-site meeting took place on November 8<sup>th</sup> with Susana, Berkeley & Ruppert to discuss at length all the path enhancement ideas.

Recycling Centers, Dog Waste Stations, Pathways: Ruppert continues weekly service of the 3 recycling centers and the 3 dog waste stations. Also, they installed a second set (3 total) of trash cans to the existing dog waste station. Also, Tony contacted the Chapel Hill Town Manager (note, this is the 2<sup>nd</sup> time Berkeley has contacted the Town) to see if they would be willing to service trash pick-up, at no cost to the HOA for all common areas. To date, there has been no response from the Town. Tony will continue to follow up until a formal answer is given. Also, Ruppert crews maintain the Central Park pathway weekly, with a special focus on the area that washes out during storms. Additionally, they have agreed to start to maintain the new path, with some trimming, etc. starting in November.

Courtyard Homes & Townhomes: Ruppert continues to visit weekly and mow, edge and blow when needed. The crew completed fall pruning/sheering. Also, fall aeration & over seeding is now complete. Additionally, the irrigation system at Highgrove Townhomes is turned off & winterized.



### **Manager's Report (continued)**

Trees: Bartlett has done some non-emergency work for the HOA since the last report. Other than that, Bartlett is basically done with its HOA service for the rest of 2018, as they have reached the limits of allowed spending per the budgeted agreement. As a reminder the Bartlett contract for serving street trees throughout Southern Village ends on 12/31/18.

Ponds: DragonFly visits monthly to perform maintenance and check all ponds. As always, the monthly services reports from DragonFly are on the website.

### **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.

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

### **Alleyways**

Nothing new to report this month. Note, Tony shared with Jerry a 25-year financial plan for alleys.

### **Special Projects**

Ruppert has started planning for on the approved pathways. Note, there are two projects, (1) to widen the existing pathway and (2) to add a new pathway connecting Brookgreen to Parkview Crescent. The formal timeline, with deadlines, has been approved by management. The path work will start late next month & most likely finish in very early 2019.

### **Website**

Berkeley continues to update the website as needed. We charge \$180 per month for this service. Also, per Board direction we will no longer post monthly financials to the website. Additionally, we removed from view all monthly financial reports. It is important to note the documents will be saved on the administrative side of the website, so no data (going back over 10 years) will be lost.

### **Condos**

Nothing new to report this month.



## **Manager's Report (continued)**

### Courtyard Homes

Pricing & service levels for 2019 landscape services has been approved by the Board. Of note, the pricing is for basic blow, mow & go services for 10 homes (the 100 block). Mulch, pruning, leaf removal & fall aeration & over seeding is not included as part of the 2019 contract

### Townhome 1

Per instructions from the Board, Berkeley will issue an RFP for new roofs this winter and the project itself will be done (finished) by May or June 2019. Additionally, trim painting & repairs will be done in 2019, per direction from the Board. To date, Berkeley has received no negative comments about Townhome 1 landscaping with Ruppert, which is a huge difference from the prior landscaper.

### Townhome 2

Trim painting & repairs will be done in 2019, per direction from the Board. To date, Berkeley has received no negative comments about Townhome 2 landscaping with Ruppert, which is a huge difference from the prior landscaper.

### Westend Townhomes

Trim painting & repairs will be done in 2019, per direction from the Board. To date, Berkeley has received no negative comments about Westend Townhomes landscaping with Ruppert, which is a huge difference from the prior landscaper.

On a positive note, Tony was able to successfully lower the fire system monitoring fees for 2019. All details were shared with Jerry, as part of the budget process. Services changes happen on 1/15/19.

### Highgrove Townhomes

Trim painting & repairs will be done in 2019, per direction from the Board. One resident requested to change the grass in front (to a type of Bermuda grass) of their unit. That request was approved by the ARB at a recent meeting. The resident is paying for the work on their own.

Again, Tony was able to successfully lower the fire system monitoring fees for 2019. All details were shared with Jerry, as part of the budget process. Services changes will happen on 12/15/18.



**Manager's Report (continued)**

Complaints

As always, Berkeley shares with the Board President once a month a listing of all SVHOA complaints, both opened and closed ones. Additionally, Tony shares this same list with the full Board prior to any Board meetings. At any time, any Board member can request a copy of the list from the Berkeley office. Note, we have gotten 2 complaints from residents for not immediately picking up the leaves, as they fall on the ground, especially near Townhomes. We do not treat this as a formal complaint, as leaves will fall nearly daily between now and the end of the year. The Ruppert crews will do their best to keep up, but there clearly will be days that leaves are on the ground in front of resident homes.

Reserves, Financial Planning

Tony created with help from Jerry, formal models that allow for 25-year planning on alleyways, 10-year planning on Townhomes & 6-year planning on HOA common property. Note, there was no need to make a model for Courtyard Homes. These models are meant to help future Boards to understand the financial needs (longer term) of all HOA accounts.

As part of that process Tony collected dues history for the last several years. See below for details.

<u>SVHOA:</u>	2019	\$320	<u>Alleys:</u>	2019	\$85
	2018	\$320		2018	\$85
	2017	\$310		2017	\$85
	2016	\$275		2016	\$85
	2015	\$245		2015	\$85
	2014	\$245		2014	\$85
	2013	\$230		2013	\$80
	2012	\$200		2012	\$73
	2011	\$200		2011	\$64
	2010	\$225		2010	\$56
	2009	\$245		2009	\$49

Additionally, Tony has this same information (going back to 2009) available for the Courtyard Homes and all four Townhome groups. He will gladly share it with any interested party at any time. The good news is that all of this information is already stored on the community website, meaning that at any time any person interested could easily see the history of dues throughout SVHOA.



**Work Orders Opened Since Last Report**

<u>Address</u>	<u>Item</u>
415 Copperline	Divert downspout