



**Southern Village Homeowners Association
Manager's Report
March 31, 2019**

Financials

Monthly financials were reviewed & approved by Hurt. At present the January & February financials are finished & have been shared with the full Board. Also, the December (year-end) financials have been shared with the HOA Tax Preparer so that work can finished on the 2018 tax return.

Next, current aging reports have been thoroughly reviewed by management & Hurt, with the appropriate actions being taken to collect all monies due, including late fees. As a reminder, the current HOA collection policy is posted on the HOA website. 2019 annual assessments were due March 1st.

Next, seven long range financial plans & 1st pass of 2020 budgets have been shared with Hurt by management. He is currently reviewing & will bring forward to the full Board at a future meeting.

Last, the 2018 tax return for the HOA is complete & is ready for Hurt to sign, then submit.

Work Orders

Since the last report 9 work order were opened & 8 work orders were closed. As always, if any HOA member wants to see the work orders they are available in the management office. Also, we have included some basic information on work orders as part of this report.

Landscape, Trees & Ponds

Pathways, Parks & Common Areas: Ruppert continues to service the property as needed during the spring months. Weekly landscape service started in early March & will continue for the entire growing season. As a reminder, the current landscape contract with Ruppert expires on 12/31/19. At present, management is planning, with Board approval, to get 3-4 bids from local landscapers for 2020 service.

Recycling Centers, Dog Waste Stations: Ruppert continues weekly service of the 3 recycling centers and the 3 dog waste stations. Obviously, the dog waste stations are well used by members/residents.

Courtyard Homes & Townhomes: Ruppert started weekly landscape services in early March. As a reminder, the services for the Courtyard Homes changed on 1/1/19, with only the 100-block getting basic landscape service (ex, mow, blow & go) during the growing season only. As a reminder, the current landscape contract with Ruppert expires on 12/31/19. At present, management is planning, with Board approval, to get 3-4 bids from local landscapers for 2020 service.



Trees: Bartlett has started very limited inspections of the street trees in 1Q19 (Jan-Mar) to ensure they remain safe. The only work they did were on safety issues throughout the HOA in the past 3 months. As a reminder, Bartlett has been given a not to exceed pricing target for all of 2019, which ensures that street tree expenses are under control and tightly management by both management & HOA Treasurer.

Additionally, Davey Trees has completed the planting of 19 street trees throughout the HOA. All work was finished on time & on budget. Management visually inspected all work done by Davey Trees.

Ponds: Dragonfly Pond Management visits monthly to perform maintenance and check all ponds. As always, the monthly services reports from DragonFly are posted on the website. As a reminder, the 2019 annual inspection is due in August/September with the Town of Chapel Hill.

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. Additionally, Hurt has agreed to serve as the Board liaison with the ARB, which is a much-needed step for even better the communication between both the Board & the ARB.

Alleyways

Nothing new to report this month. Note, management shared with Hurt a long-range financial plan for alleys. As has been the case for the several years, a trusted vendor, Asphalt Enterprises, will inspect all HOA maintained alleyways in May 2019 & issue a formal report of what must be fixed, what should be fixed & what needs to be on the watch list for future inspections.

Website

Management continues to update the website as needed. There is no charge for these services.

Condos

Nothing new to report this month. As previously stated, 2019 assessments were mailed out in January.

Courtyard Homes

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Courtyard Homes (continued)

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Townhome I

Per instructions from the Board, management issued an RFP for new roofs on February 20th. All responses were due by March 20th. A total of four proposals were returned & are now being reviewed by management, Hurt, Rana & Nancy Morton (who is serving as the TH1 representative to the TH Committee). Once the final recommendation is ready it will be shared with the full Board.

Additionally, trim painting & repairs for TH1 will be delayed in 2020, per direction from the Board.

Townhome II

Trim painting & repairs for THII will be delayed in 2020, per direction from the Board.

Westend Townhomes

Per direction of the Board, management will be using an RFP for exterior painting & repairs work to be done in 2019. Management will issue an RFP for such on April 30th, with the current plan to have all painting & repairs for these 22 units done by September. Please note, 2-3 residents of Westend THs are requesting the siding color change during this cycle, clearly that will need to be discussed more.

Highgrove Townhomes

As is the case with Westend Townhomes, exterior painting & repairs will be done in 2019, per direction from the Board. Management will issue an RFP for such on April 30th, with the current plan to have all painting & repairs for these 48 units done by September.

Complaints

As per Board direction, complaints are shared monthly (end of each month) with the Board President. Additionally, a full list of all complaints is shared with the full Board prior to each Board meeting. At present, there is one open complaint, which is a resident doing exterior work to a home without ARB approval. Note, Management is already working with the resident in question to get the necessary paperwork filed with the ARB.



2019 Highlights

The following items were successfully done for the HOA in January, February & March:

- Mailed out nearly 700 notices for annual assessments
- Mailed out nearly 700 packets for the 2019 SVHOA Annual General Meeting
- 2 pathways were enhanced (improved) in January
- New & improved landscape drainage, associated with these 2 pathways, including significant cost sharing with Southern Village Club, LLC
- Ponds serviced monthly (January, February, March); with reports posted on website
- Street Trees with storm damage, from Winter Storm Diego, cleaned up by Bartlett Tree Service
- 19 replacement street trees planted by Davey Trees in March
- New Board member (for 2 new members) training happened in February
- New SVHOA Board Treasurer training happened in both February and March; including the change over of all bank signing authority at Pinnacle Bank
- 2 Board meetings, one in January and a second in February (immediately after the AGM)
- Annual meeting on February 19th
- SVHOA Collections (aging) tightly managed, with only 1 account past due over 180 days
- Issued RFP for new roofs for TH1 in February; with 4 responses come back in March; good news: range of pricing is on average below the long-range financial models (which further validates the assumptions being used for all 141 townhome groups)
- Re-established Townhome Committee, with Rana Singh serving as Chair
- Completed and approved 2018 Tax Return; of note, no monies owed; fees were part of last year's audit fees, no in effect 2018 Tax Return was done at zero cost to the HOA



Work Orders Opened
Since Last Report

<u>Address</u>	<u>Item</u>
102 Glade	Inspection: wood rot
Calderon Park	lock on water faucet
114 Westgreen	roof leak
Westend Townhomes	repairs needed after sprinkler system inspection
403 Copperline	repair gutter
512 Copperline	repair gutter, repair downspout
113 Nolen	roof leak
404 Copperline	Inspection: wood rot, repair downspouts add drain
107 Westside	roof leak