

Summerfield Homeowners Association



ANNUAL UPDATE
2020

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Board Members



- Tom Halfaker - President
- Kim Caterina - VP & Architectural Committee Chair
- Brad Phillips – Secretary & Communications
- Michael Spring– Treasurer
- Bob McCleary – Special Projects

State of the Association



- **Review of 2019 – 2020**

- The past year for the SHOA was uneventful until the arrival of Covid-19. Minor upgrades have been made to some of the common areas (see Special Projects Report). Due to health restrictions in place, all board meetings are now held via Zoom and the community pool will remain closed until it can be opened safely and in compliance with county restrictions.

- **Financial Status**

- See Financial Report for full details. The financial position of the Association continues to be healthy. The board had planned to raise annual homeowner dues this year, but decided against this given current economic conditions.

State of the Association



- **Goals for 2020 - 2021 Fiscal Year**
 - The primary goal for the upcoming year will be to get the community pool open. We have two major constraints:
 1. We must follow county regulations for pool opening and operating under Covid-19 restrictions
 2. As an Association, we are not setup to have continuous pool supervision if this is mandated under new operating rules
 - The other major goal will be to explore having the community pool re-plastered during the off-season at the end of this calendar year.
 - We will also continue to recruit new volunteers to serve on the board.

Architectural Committee Team Members



- Kim Caterina (Chair)
- Dana Giampietro
- Sarah Orr
- Amanda Boruff
- Shelby Thomas
- Aerial Anger**
- Diane Mendoza**
- Francean Williams**
- Kenny Malone**
- Michael Spring**

* new in the past year

** departed in the past year

Architectural Committee 2019-2020 Highlights



- Approved 59 Applications for Improvement (8 paint, 15 landscaping/hardscaping, 11 solar, 5 fence, 6 roof, 1 mailbox, 2 window, 1 patio cover, 1 gutter, 6 front door, 1 garage door, 2 window)
- Had 145 'perfect' homes throughout the year.
- Held **2** Violation Meetings
- Approval of most applications can be done via email
- Approved a few new exterior paint colors
- Reminder: Watch those weeds and garbage/recycle bins. Make sure to send in an architectural request form before any work is done to your yard/house.

Examples of Recent Improvement Projects



Beautiful hardscaping



Amazing landscaping



Great landscaping/hardscaping design



Nice Looking Vinyl Fence

New Exterior Paint Approved



Amazing Front Door Color



Treasurer's Report



- 2019-2020 YTD Financial Summary
- 2020-2021 Budget & Dues

2019-2020 YTD Financial Summary

Summerfield Homeowner's Association

BUDGET VS. ACTUALS: FY_2019_2020 - FY20 P&L

July 1, 2019 - May 21, 2020

- The statement below reflects the HOA's account summary as of May 21, 2020.
- The statement on the right reflects the financial statement for the 209-2020 fiscal year.

Summerfield Homeowner's Association

STATEMENT OF FINANCIAL POSITION

As of May 21, 2020

| | TOTAL |
|--------------------------------|---------------------|
| ▼ ASSETS | |
| ▼ Current Assets | |
| ▼ Bank Accounts | |
| Funds Clearing | 0.00 |
| Pacific Western - Checking | 46,665.60 |
| Pacific Western - MM | 3,474.16 |
| Pacific Western - Reserve Acct | 97,099.57 |
| Total Bank Accounts | \$147,239.33 |
| ▶ Accounts Receivable | \$0.00 |
| ▶ Other Current Assets | \$195.00 |
| Total Current Assets | \$147,434.33 |
| ▶ Fixed Assets | \$122.90 |
| TOTAL ASSETS | \$147,557.23 |
| ▶ LIABILITIES AND EQUITY | \$147,557.23 |

| | TOTAL | | | |
|-----------------------------|--------------------|--------------------|---------------------|----------------|
| | ACTUAL | BUDGET | OVER BUDGET | % OF BUDGET |
| ▶ Revenue | \$58,030.58 | \$56,510.33 | \$1,520.25 | 102.69 % |
| GROSS PROFIT | \$58,030.58 | \$56,510.33 | \$1,520.25 | 102.69 % |
| ▼ Expenditures | | | | |
| Accounting | 993.75 | 50.00 | 943.75 | 1,987.50 % |
| Annual Homeowners Meeting | | 150.00 | -150.00 | |
| Automobile Expense | | 0.00 | 0.00 | |
| HOA Membership | | 295.00 | -295.00 | |
| Insurance | 5,780.00 | 5,885.00 | -105.00 | 98.22 % |
| ▶ Landscaping | 7,774.72 | 8,340.00 | -565.28 | 93.22 % |
| Legal Fees | 950.00 | 3,000.00 | -2,050.00 | 31.67 % |
| Meals & Entertainment | | 0.00 | 0.00 | |
| Plumbing | | 0.00 | 0.00 | |
| ▶ Pool | 4,667.88 | 7,565.00 | -2,897.12 | 61.70 % |
| ▶ Postage and Delivery | 320.04 | 350.00 | -29.96 | 91.44 % |
| Printing | | 20.00 | -20.00 | |
| Repairs & Maint. | 461.55 | 0.00 | 461.55 | |
| Reserve Study | | 0.00 | 0.00 | |
| ▶ Social Events | | 600.00 | -600.00 | |
| ▶ Supplies | 34.02 | 1,000.00 | -965.98 | 3.40 % |
| Tax Preparation/Annual Rept | 1,750.00 | 1,500.00 | 250.00 | 116.67 % |
| Taxes, Licenses & Permits | 35.00 | 275.00 | -240.00 | 12.73 % |
| Uncategorized Expense | 310.00 | | 310.00 | |
| ▶ Utilities | 6,819.81 | 8,315.00 | -1,495.19 | 82.02 % |
| Website | 204.46 | 0.00 | 204.46 | |
| Total Expenditures | \$30,101.23 | \$37,345.00 | \$ -7,243.77 | 80.60 % |
| NET OPERATING REVENUE | \$27,929.35 | \$19,165.33 | \$8,764.02 | 145.73 % |
| ▶ Other Revenue | \$0.00 | \$0.00 | \$0.00 | 0.00 % |
| ▶ Other Expenditures | \$1,318.86 | \$0.00 | \$1,318.86 | 0.00 % |
| NET OTHER REVENUE | \$ -1,318.86 | \$0.00 | \$ -1,318.86 | 0.00 % |
| NET REVENUE | \$26,610.49 | \$19,165.33 | \$7,445.16 | 138.85 % |

2020-2021 Budget & Dues

Summerfield Homeowner's Association

BUDGET OVERVIEW: SHOA FY_2020_2021 - FY21 P&L
July 2020 - June 2021

| | TOTAL |
|-----------------------------------|---------------------|
| Revenue | \$57,185.29 |
| GROSS PROFIT | \$57,185.29 |
| Expenditures | |
| Accounting | 993.75 |
| Insurance | 5,780.00 |
| Landscaping | 2,898.80 |
| General Maint | 4,875.92 |
| Total Landscaping | 7,774.72 |
| Legal Fees | 950.00 |
| Pool | 395.00 |
| Pool Area Maintenance | 348.88 |
| Pool Cleaning & Maint. | 3,575.00 |
| Pool Permit | 349.00 |
| Total Pool | 4,667.88 |
| Postage and Delivery | 157.96 |
| Postal Box Rental | 128.00 |
| Stamps/Mailing | 50.00 |
| Total Postage and Delivery | 335.96 |
| Repairs & Maint. | 461.55 |
| Supplies | |
| Office | 34.02 |
| Total Supplies | 34.02 |
| Tax Preparation/Annual Rept | 2,000.00 |
| Taxes, Licenses & Permits | 35.00 |
| Uncategorized Expense | 310.00 |
| Utilities | |
| Gas and Electric | 1,357.87 |
| Water | 5,461.94 |
| Total Utilities | 6,819.81 |
| Website | 204.46 |
| Total Expenditures | \$30,867.15 |
| NET OPERATING REVENUE | \$26,818.14 |
| Other Expenditures | \$1,318.86 |
| NET OTHER REVENUE | \$ -1,318.86 |
| NET REVENUE | \$25,499.28 |

- The statement on the left reflects our 2020-2021 Budget.
- SHOA annual dues of \$320 per property
- Invoices mailed in June & payment due by July 31st

Communications Report



- Website
 - SummerfieldPoway.com
 - Goal: simple but useful
 - Policy documents
 - Meeting minutes
 - Docs needed for escrow
 - Announcements
 - Search looks inside all policies!

The screenshot shows the homepage of the Summerfield HOA website. At the top left is the Summerfield logo, which features a house silhouette with a sun above it and the word "Summerfield" in a green, cursive font. Below the logo is a dark navigation menu with the following items: Home, HOA Board, Newsletter, Policies & Forms, Meetings & Events, Map, FAQ, Contact Us, and Announcements. Below the menu is a search bar with a "Search" button. Underneath the search bar is a "Recent Posts" section with one entry: "Spring 2017 Newsletter Posted". On the right side of the page, there is a "Home" section with a photograph of a house. Below the photo is a welcome message: "Welcome to Summerfield—a neighborhood on the border of San Diego's Rancho Santa Fe. Summerfield has been a desirable community in San Diego County. Summerfield residents enjoy..." followed by a bulleted list of amenities: "our own neighborhood pool", "neighborhood holiday parties", "access to adjacent equestrian trails", "the convenience of nearby shopping", "close proximity to Lake Poway recreation", and "a self-managed association". At the bottom right, the contact information for Summerfield HOA is listed: "Summerfield HOA, PO Box 28143, San Diego CA 92198, summerfieldpoway@gmail.com".

New to the Neighborhood – Start here!



- Created a ‘how the neighborhood works’ intro page

Button on home page
and
Listed on menu

A green rectangular button with rounded corners, containing a white house icon and the text "New to the Neighborhood? Start Here!".

[New to the Neighborhood? Start Here!](#)



New to the Neighborhood? Start here!

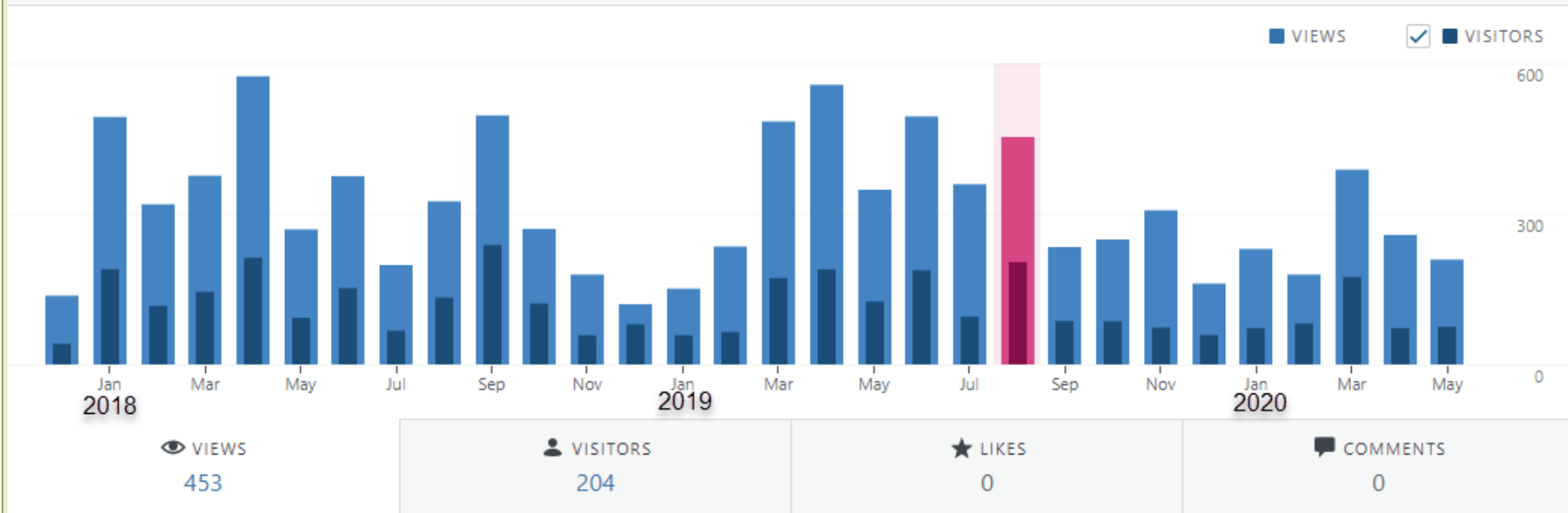
On behalf of the neighborhood, the Board of Directors of the Summerfield Homeowners Association (SHOA) welcomes you to our community. Our neighborhood HOA is governed and self-managed by a volunteer group of homeowners who are selected in annual elections to serve on the SHOA Board. We think you will enjoy the neighborhood and hope you will have a

Communications Report



- Website Views & Visitors

- Peak since July 1 was Aug 2019: Crime and Safety Update



Communications Report



- Website View Stats for 365 days ending May 15, 2020

| | |
|--|-----|
| Policies & Forms | 925 |
| Home | 846 |
| HOA Board | 284 |
| Summerfield Scoops – June 2019 | 230 |
| Crime and Safety Update | 195 |
| Summerfield Scoops - March 2020 | 138 |
| New to the Neighborhood | 120 |
| Contact Us | 110 |
| Summerfield Update for Architectural Standards and Assessment Collection Policy | 104 |
| Map | 90 |
| 2019 Summerfield Pool Opening | 64 |
| FAQ | 80 |

Communications Report

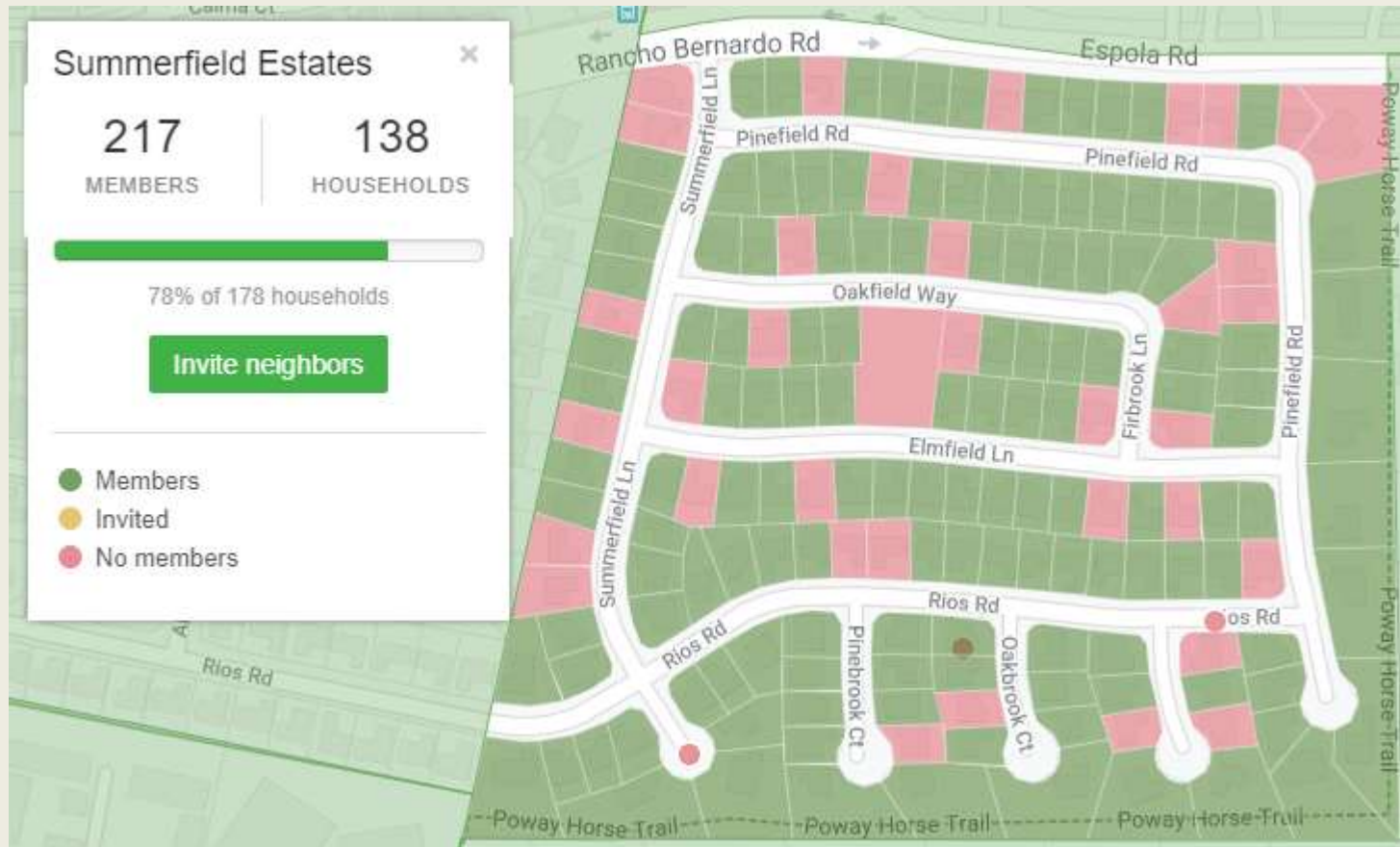


- Getting the word out: *Any Way We Can*
- Emails
 - summerfieldpoway@gmail.com
 - hoa@summerfieldpoway.com
 - MailChimp
 - 50% to 60% get opened
- Making announcements on Facebook and NextDoor
 - summerfieldpoway.nextdoor.com
 - facebook.com/groups/summerfieldstates/

Communications Report



- NextDoor – get your neighbors to join!



Communications Report

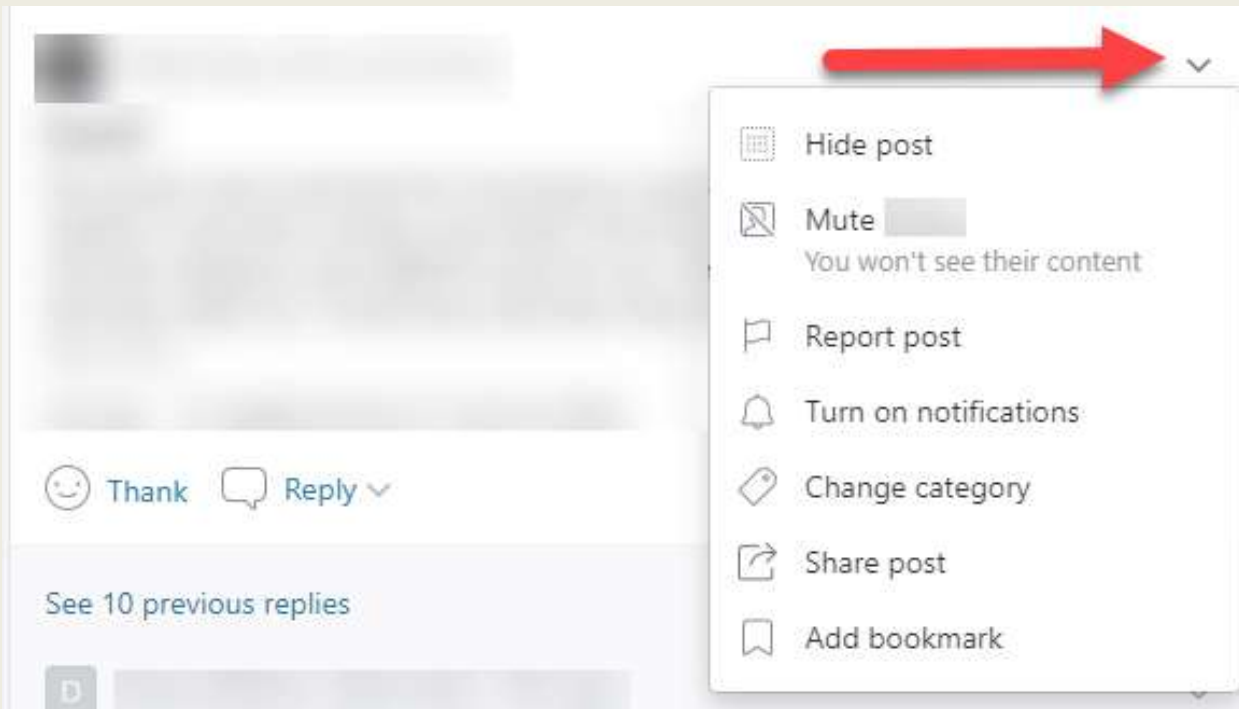


- NextDoor – Getting the most out of it
 - Choose your privacy settings
 - Choose whether and how often to get emails
 - Follow the NextDoor Community Guidelines, boiled down to "Everyone here is your neighbor. Treat each other with respect."
 - Use the right categories for posts
 - Every post (and response) should be about LOCAL issues.
 - Don't use Nextdoor as a soapbox

Communications Report



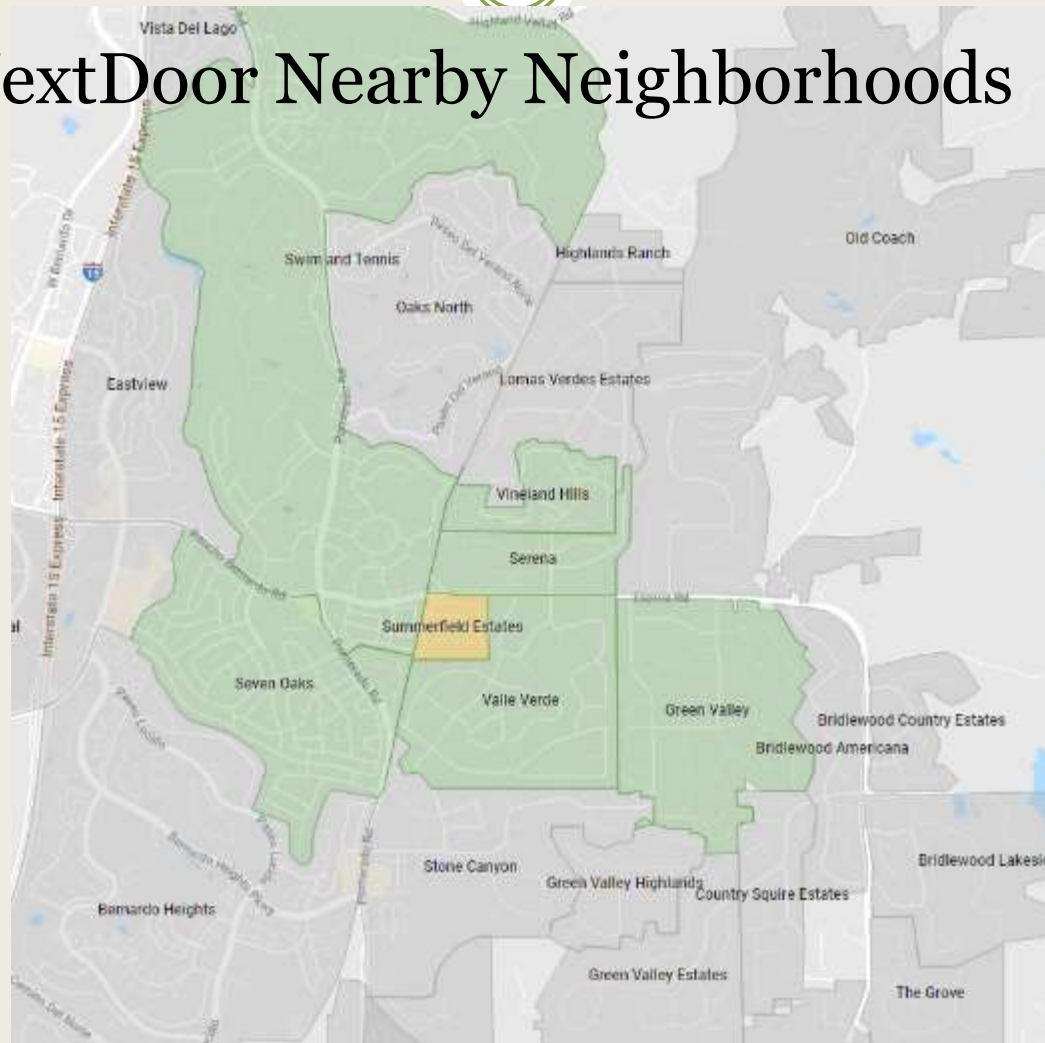
- NextDoor – Getting the most out of it
 - 'Hide posts' or 'Mute' problematic posters



Communications Report



- Choose NextDoor Nearby Neighborhoods



Communications Report



- Summerfield Scoops
 - Moved to more phone friendly
 - Anyone want to help write or suggest articles?



Communications Report



Keep us updated, so we can keep you updated!

New/alternate address? Renting?

New Representative/POA (Power of Attorney)?

(It's the law: CA Civil Code 4041)

And: Email + Phone contact info



Special Projects

- New pool gate lock
- New signs
- Refurbished pool furniture
- Asphalt repair

New Pool Gate Lock



- Heavy-duty commercial grade
- Brushed chrome, ANSI compliant

New Pool Signs

POOL RULES

1. Pool hours are 6am to 10pm.
2. The gate to enter the pool area must be kept locked at all times. Do not grant access to people without keys. This pool is for the use of Summerfield residents and their guests. All others are trespassing and should be reported to the Sheriff at the non-emergency dispatch # 858-565-5200, and also to the HOA board (see #10 below).
3. No profanity, running, horseplay or unsafe conduct is permitted.
4. No pets, motorcycles, bicycles, skateboards, frisbees, skates or rollerblades are allowed in the pool area.
5. No gum, glass objects or smoking allowed in the pool area. Beverages and food are allowed in the pool area, but not in the pool. Please use trash receptacles.
6. Clean up and haul trash home after parties.
7. Hardballs such as tennis balls or smash ball are not permitted.
8. Parents are responsible for their children. Damage to the pool area by residents, their children or their guests will be paid for by the residents.
9. All babies and young children who wear diapers must wear a diaper designed for swimming protection.
10. Report pool maintenance issues to SummerfieldPoway@gmail.com or call a board member; current numbers are listed on SummerfieldPoway.com.
11. Any infraction of these rules is cause for immediate dismissal from the pool.
12. Every homeowner has the right to enforce these rules and is encouraged to do so.



Refurbished Pool Furniture

- New straps and glides for chairs & chaise lounges
- Wider, stronger straps
- Lighter UV-resistant color



Asphalt Repair

- Summerfield Lane walk-thru
- Crack fill and seal



Election Status



- 2020 Election

- The annual election was not held this year because:
 1. The restrictions imposed by the state and county related to Covid-19 did not permit the election to be run safely
 2. There were no new volunteer candidates to run for the open seat that was to be filled in this election
- The open seat is currently held by current board president Tom Halfaker. He was not planning to run for re-election but has offered to continue serving in this role, if the board so desires, until a replacement can be named.
- The normal board election cycle should resume next year.

Closing



- Please volunteer your time as a potential board member or as a member of the Architectural Committee

Thank you