

Summerfield Homeowners Association



ANNUAL UPDATE

2022

Contents



1. Board Members
2. Status of the Association – Tom Halfaker
3. Architectural Committee Report – Denise Shields
4. Treasurer's Report – Michael Spring
5. Communications Update – Brad Phillips
6. Special Projects Update – Dan Carr
7. Election Status
8. Request for Volunteers

Board Members



- Tom Halfaker - President
- Denise Shields - VP & Architectural Committee Chair
- Brad Phillips – Secretary & Communications*
- Michael Spring– Treasurer*
- Dan Carr – Special Projects

* *Re-elected by acclimation due to no alternative candidates*

State of the Association



- **Review of 2021 – 2022**

- The past year for the SHOA has seen operational changes due to Covid-19. All board meetings are being held via Zoom. The community pool has been resurfaced.

- **Financial Status**

- See Financial Report for full details. The financial position of the Association continues to be strong, but reserve funds were spent on pool resurfacing. The board will be raising annual dues this year.

State of the Association



- **Goals for 2022 - 2023 Fiscal Year**
 - The primary goal for the upcoming year will be continuing upkeep and access to the community pool
 - In addition, we will continue recruitment of neighborhood volunteers to serve on the HOA board and the Architectural Committee

Architectural Committee Team Members



- Denise Shields *(Chair)
- Dana Giampietro
- Sarah Orr
- Ben Cather *
- Nadine Vasques *
- Maria Stein *
- Amanda Boruff **
- Shelby Thomas **

* new in the past year

** departed in the past year

Architectural Committee 2021-2022 Highlights



- Approved 32 Applications for Improvement (8 paint, 2 landscaping/hardscaping, 9 solar, 6 fence, 1 chimney cap, 1 mailbox, 1 backyard shed/office, 2 windows, 1 front door, 1 patio cover)
- Had 138 ‘perfect’ homes throughout the year.
- Held 0 Violation Meetings
- Three additional white paints added to the approved colors
 - Whisper, White Picket Fence, Milk Glass
- 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



Decorative stone replacing brick



New fence

New garage door and paint



New front door & paint



Treasurer's Report



- 2021-2022 YTD Financial Position
- 2021-2022 YTD Budget vs. Actuals
- 2022-2023 Budget & Dues

2021-2022 YTD Financial Summary



- The statement below reflects the HOA's account summary as of May 16, 2022. Estimate \$3,500 expenses remaining thru end of June Summerfield Homeowner's Association

Statement of Financial Position
As of May 16, 2022

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Chase Checking	31,966.38
Chase Reserve	100,785.01
Chase Savings	3,474.85
Funds Clearing	0.00
Total Bank Accounts	\$136,226.24
Accounts Receivable	
Accounts Receivable	0.00
Total Accounts Receivable	\$0.00
Other Current Assets	
Deposits In Transit	0.00
Escrow Transfer Fee Receivable	0.00
Pool Solar Project	0.00
Prepaid Insurance	0.00
Receivable	0.00
Undeposited Funds	0.00
Total Other Current Assets	\$0.00
Total Current Assets	\$136,226.24
Fixed Assets	
Accumulated Depreciation	-16,784.58
Fixed Assets	
Computer Equip	734.58
Fence	0.00
Prior Yrs	16,050.00
Total Fixed Assets	16,784.58
Total Fixed Assets	\$0.00
TOTAL ASSETS	\$136,226.24

2021-2022 YTD Budget vs. Actuals

Summerfield Homeowner's Association

Budget vs. Actuals: SHOA FY_2021_2022 (Copy) - FY22 P&L
July 2021 - June 2022

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Revenue				
Escrow Transfer Fee	900.00	900.00	0.00	100.00 %
Homeowner's Dues	55,480.00	55,360.00	120.00	100.22 %
Interest Income	0.03	0.29	-0.26	10.34 %
Late Fees	25.00	275.00	-250.00	9.09 %
Penalties		172.50	-172.50	
Sales		-25.00	25.00	
Tax Refunds	50.00	25.00	25.00	200.00 %
Unapplied Cash Payment Income	-320.00		-320.00	
Uncategorized Income	0.29		0.29	
Total Revenue	\$56,135.32	\$56,707.79	\$ -572.47	98.99 %
GROSS PROFIT	\$56,135.32	\$56,707.79	\$ -572.47	98.99 %
Expenditures				
Accounting	785.00	993.75	-208.75	78.99 %
HOA Membership	310.00		310.00	
Insurance	5,883.00	5,780.00	103.00	101.78 %
Landscaping				
General Maint	9,992.30	10,000.00	-7.70	99.92 %
Total Landscaping	9,992.30	10,000.00	-7.70	99.92 %
Legal Fees	950.00	950.00	0.00	100.00 %
Pool		395.00	-395.00	
Pool Area Maintenance	1,104.04	348.88	755.16	316.45 %
Pool Cleaning & Maint.	7,549.32	3,575.00	3,974.32	211.17 %
Pool Keys	151.26		151.26	
Pool Permit	349.00	349.00	0.00	100.00 %
Total Pool	9,153.62	4,667.88	4,485.74	196.10 %
Postage and Delivery		157.96	-157.96	
Postal Box Rental	146.00	128.00	18.00	114.06 %
Stamps/Mailing	131.25	50.00	81.25	262.50 %
Total Postage and Delivery	277.25	335.96	-58.71	82.52 %
Repairs & Maint.	450.00	461.55	-11.55	97.50 %
Supplies				
Office		34.02	-34.02	
Total Supplies		34.02	-34.02	
Tax Preparation/Annual Rept	1,700.00	2,000.00	-300.00	85.00 %
Taxes, Licenses & Permits		35.00	-35.00	
Uncategorized Expense		310.00	-310.00	
Utilities				
Gas and Electric	4,338.43	1,357.87	2,980.56	319.50 %
Water	8,523.58	5,461.94	3,061.64	156.05 %
Total Utilities	12,862.01	6,819.81	6,042.20	188.60 %

2021-2022 YTD Budget vs. Actuals

Summerfield Homeowner's Association

Budget vs. Actuals: SHOA FY_2021_2022 (Copy) - FY22 P&L

July 2021 - June 2022

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Website	309.86	204.46	105.40	151.55 %
Total Expenditures	\$42,673.04	\$32,592.43	\$10,080.61	130.93 %
NET OPERATING REVENUE	\$13,462.28	\$24,115.36	\$ -10,653.08	55.82 %
Other Expenditures				
Non-Operating Exp/Reserve Funds				
Fence Repair	1,992.00		1,992.00	
Pool - Repairs	250.00		250.00	
Pool Resurfacing Project	32,040.00	28,640.00	3,400.00	111.87 %
Total Non-Operating Exp/Reserve Funds	34,282.00	28,640.00	5,642.00	119.70 %
Total Other Expenditures	\$34,282.00	\$28,640.00	\$5,642.00	119.70 %
NET OTHER REVENUE	\$ -34,282.00	\$ -28,640.00	\$ -5,642.00	119.70 %
NET REVENUE	\$ -20,819.72	\$ -4,524.64	\$ -16,295.08	460.14 %

2022-2023 Budget & Dues

Summerfield Homeowner's Association

Budget Overview: SHOA FY_2022_2023 - FY23 P&L

July 2022 - June 2023

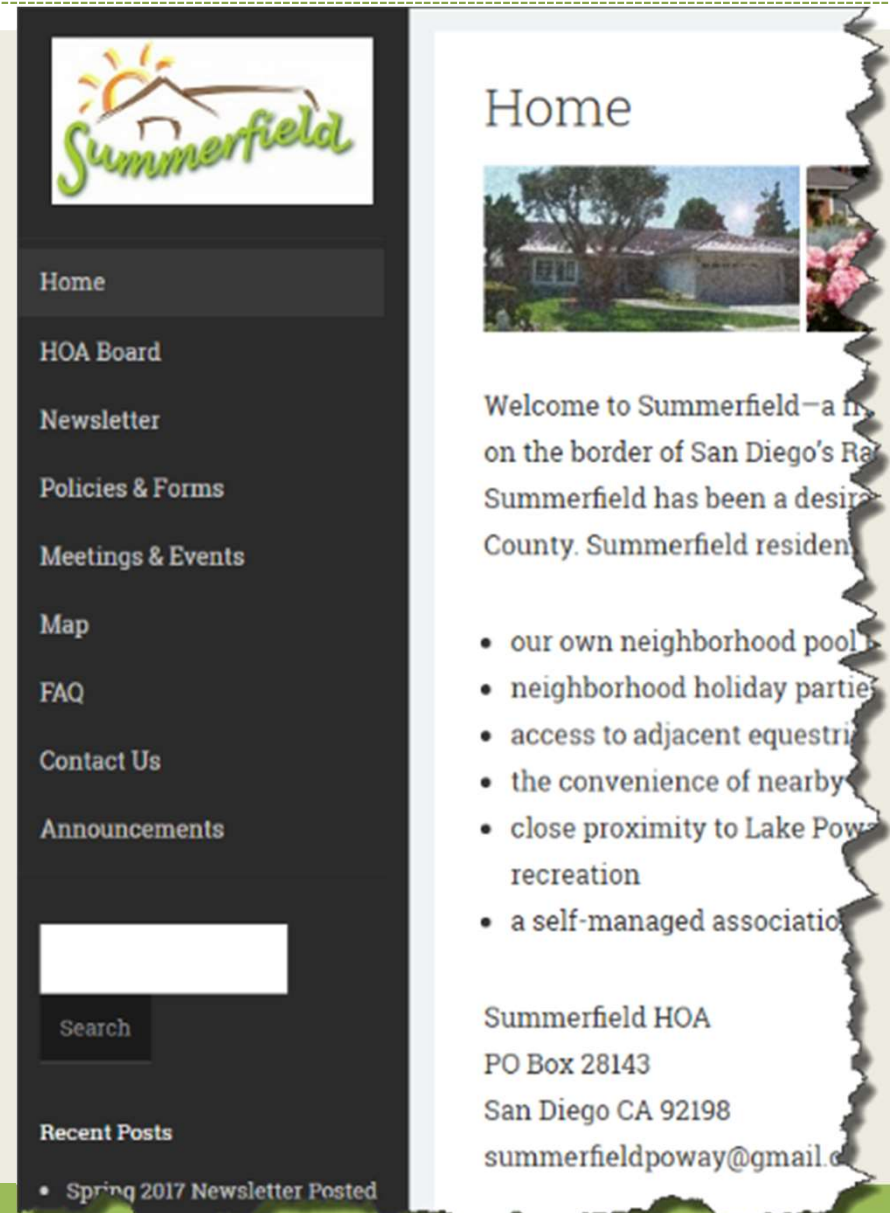
	TOTAL
Revenue	
Escrow Transfer Fee	900.00
Homeowner's Dues	60,550.00
Interest Income	0.29
Late Fees	275.00
Penalties	172.50
Sales	-25.00
Tax Refunds	50.00
Total Revenue	\$61,922.79
GROSS PROFIT	\$61,922.79
Expenditures	
Accounting	1,250.00
Insurance	5,900.00
Landscaping	
General Maint	11,000.00
Total Landscaping	11,000.00
Legal Fees	950.00
Pool	395.00
Pool Area Maintenance	1,000.00
Pool Cleaning & Maint.	8,500.00
Pool Permit	349.00
Total Pool	10,244.00
Postage and Delivery	157.96
Postal Box Rental	128.00
Stamps/Mailing	150.00
Total Postage and Delivery	435.96
Repairs & Maint.	470.00
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	5,000.00
Water	9,500.00
Total Utilities	14,500.00
Website	205.00
Total Expenditures	\$47,333.98
NET OPERATING REVENUE	\$14,588.81
NET REVENUE	\$14,588.81

- The statement on the left reflects our 2022-2023 Budget.
- SHOA annual dues of \$350 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 logo for Summerfield, featuring a house silhouette 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. A search bar is located below the menu. The main content area on the right has a "Home" heading and 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, contact information is provided: "Summerfield HOA, PO Box 28143, San Diego CA 92198, summerfieldpoway@gmail.com". A "Recent Posts" section at the bottom left of the page shows "Spring 2017 Newsletter Posted".

New to the Neighborhood – Start here!



- ‘How the neighborhood works’ intro page

Button on home page
and
Listed on menu



 New to the Neighborhood? Start Here!

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

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 for the last year: April 2022: Pool re-opening and Scoops



Communications Report



- Website View Stats for 365 days ending May 21, 2022

Home	930
Policies & Forms	597
Summerfield Scoops – April 2022	171
HOA Board	160
New to the Neighborhood	108
2021 Annual Update Presentation Posted	99
Newsletter	96
Parents – Have you seen these signs?	92
FAQ	79
Contact Us	77
Announcements	61
Map	60

Communications Report



- Getting the word out: *Any Way We Can*
- Emails
 - summerfieldpoway@gmail.com
 - hoa@summerfieldpoway.com (goes to same email)
 - MailChimp
- Making announcements on Facebook and NextDoor
 - facebook.com/groups/summerfieldstates/
 - nextdoor.com/neighborhood/summerfieldpoway--poway--ca/

Communications Report

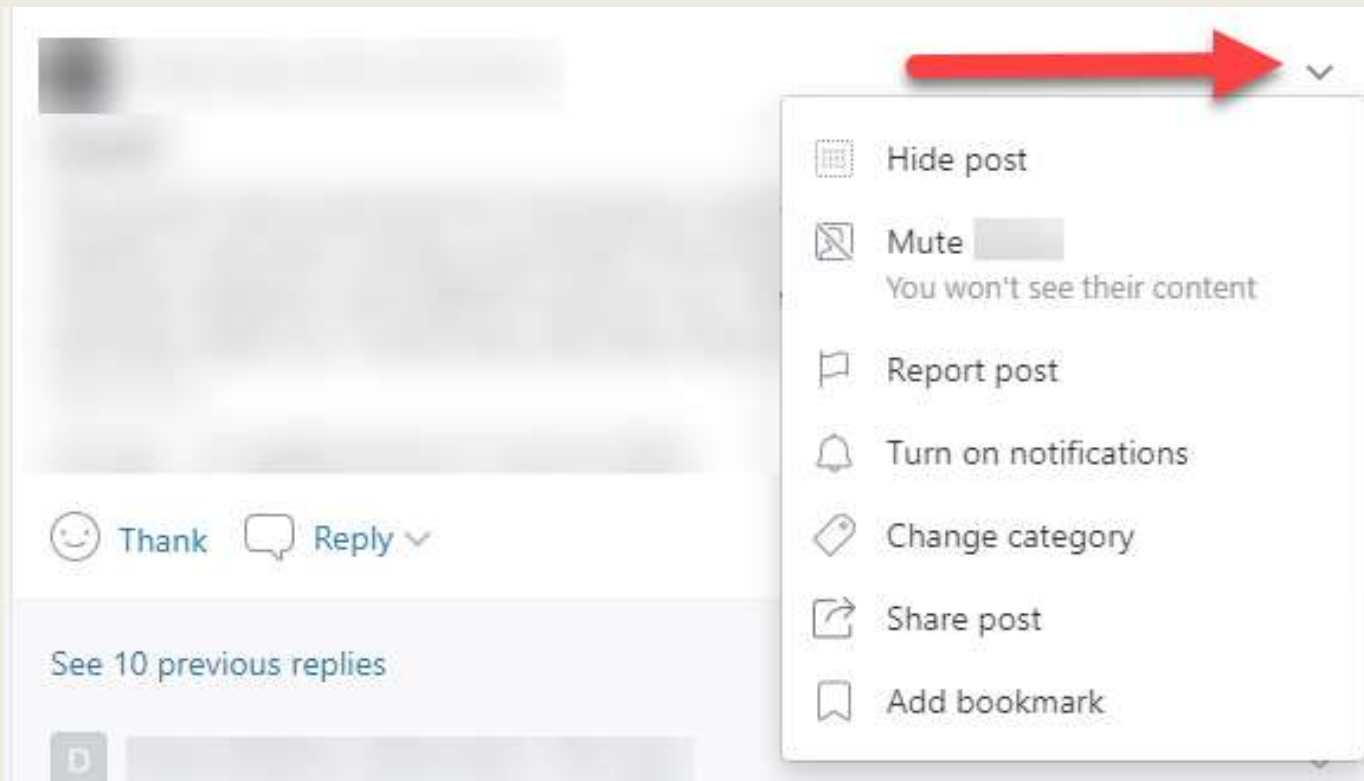


- Facebook Private Group
 - Best for lost and found/just our neighborhood info
- NextDoor – Getting the most out of it
 - Choose your privacy settings
 - Choose whether and how often to get emails
 - Follow the NextDoor Community Guidelines, boiled down to "Everyone here is your neighbor. Treat each 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



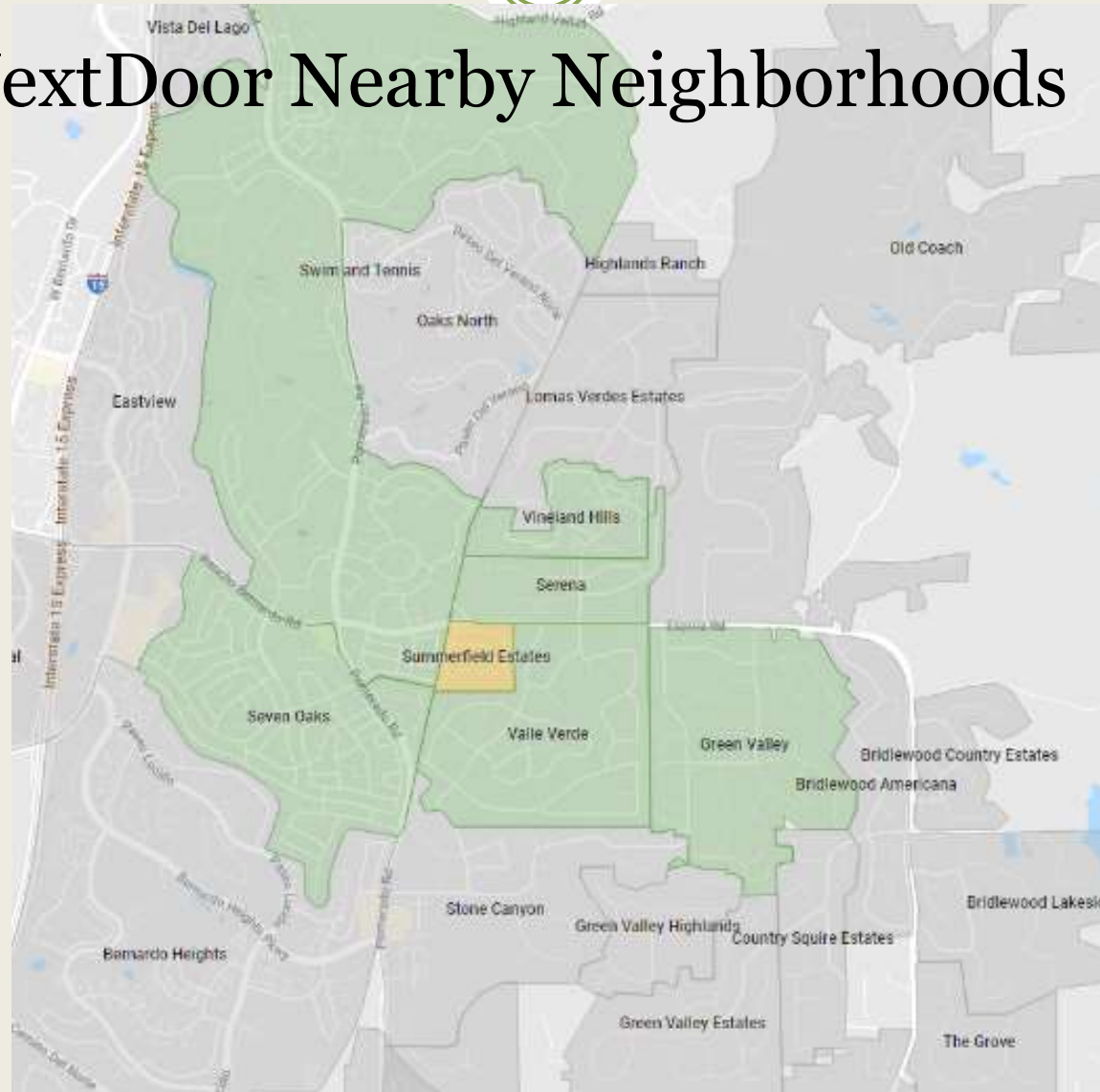
- NextDoor – Getting the most out of it
 - 'Hide posts' or 'Mute' problematic posters



Communications Report



- Choose NextDoor Nearby Neighborhoods



Communications Report



- Summerfield Scoops
 - Anyone want to help write or suggest articles?



Communications Report



Keep us updated, so we can keep you updated!

New/alternate address? Renting? Rep/POA?

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

And: Email + Phone contact info



Special Projects

Recently Completed Projects

- **Pool resurfacing**
 - Completed Fall 2021 through early 2022 (Thank you Bob McCleary!)
 - Included new quartz surface with improved durability
 - Railing height revised to comply with county code
- **Pool skimmer replacement**
 - Completed Spring 2022
 - Replaced leaking skimmer on south side of pool; reduces water waste and improves effectiveness of system's ability to filter and clean

Special Projects

Upcoming/Future Projects

- Pool pergola repair
 - Termite, dry rot, and fungus issues are currently affecting the pool pergola in several different places
 - Working with 1st Choice Pest Management to fix all termite damage and replace all damaged parts of pergola and pump/restroom structure including:
 - *Structural posts*
 - *Joists*
 - *Slats*
 - *Exterior ribbon joists*
 - Work expected to be completed this summer. Will only affect pool area for 1 day.

Special Projects

Ongoing Service Management

- **Pool Service**
 - Continuing relationship with John from Living Water for day-to-day pool service
- **Common Area Lawn Service**
 - Continuing relationship with existing lawn service, but working with crew to more proactively identify areas that need attention, e.g. weeding at main entrance, trimming/weeding of 'pass-through' walkways, etc.

Please contact the board if you notice any areas that need attention and we will address them with our vendors!

Election Status



- **2022 Election**

- The annual election was not held this year because:
 1. There were no new volunteer candidates to run for the open seats that were to be filled in this election
- The open seats will continue to be held by current board members Michael Spring (Treasurer) and Brad Phillips (Communications/Secretary). We need volunteers for the Board!
- The normal board election cycle will hopefully resume next year.

Closing



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

Thank you