

# Summerfield Homeowners Association



ANNUAL UPDATE  
2023

# Agenda



1. Board Members
2. Status of the Association – Tom Halfaker
3. Neighborhood Safety – Eric Kant (Poway Sheriff Rep.)
4. Architectural Committee Report – Denise Shields
5. 50<sup>th</sup> Summerfield Anniversary – Denise Shields
6. Treasurer's Report – Michael Spring
7. Communications Update – Brad Phillips
8. Special Projects Update – Dan Carr
9. Election Status
10. 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 2022 – 2023
  - The past year for the SHOA has been relatively quiet, with minor improvement projects focused on the community pool. All board meetings are being held via Zoom.
- Financial Status
  - See Financial Report for full details. The financial position of the Association continues to be strong. The board will be raising annual dues this year.

# State of the Association



- Goals for 2023 - 2024 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

\* new in the past year

\*\* departed in the past year

# Architectural Committee 2022-2023 Highlights



- Approved 40 applications for improvements
- 9 exterior paint
- 7 landscaping/hardscaping, 2 turf, 6 solar, 5 fence
- 1 patio cover, 1 room addition, 1 windows, 3 front doors,
- 1 screen door, 3 basketball hoops
- 1 front stone façade replaced
- 119 “perfect” homes received no notices in the last year
- 54 homes received 1 or more notices in the last year
- No violation meetings were needed in the last year
- Reminder: Watch those weeds! Garbage/recycle bins must be stored out of sight. Be sure to send in an architectural request form before any work is done to your yard/house.

# Room Addition





# New Front Door



# New Drought-Tolerant “Grass” (Kurapia)



# Replaced Rock Façade w/ Brick, New Paint



# New Landscaping



# Artificial Turf



# Summerfield 50<sup>th</sup> Anniversary Fun Facts



- There are 6 original owners, 3 of whom still live in their home: Rana, Georgens (Cedar Tree), Segoria (Summerfield)
- Original home price range: \$33,995 - \$38,995
- Original HOA dues: \$34.80 per year; \$76/yr. in 1979
- HOA bank account balances in Jan 1976: checking: \$855.83, savings: \$3872.17
- Stop sign at Summerfield and Rios initially proposed in 1975, but not installed until about 10 years later.
- Traffic light at Ranch Bernardo Road and Summerfield Ln installed July 1989.

# Summerfield 50<sup>th</sup> Anniversary Fun Facts



- In 1976 some residents proposed removing the pool and building 3 additional houses on the pool property. Their reason was apparently to avoid paying the HOA dues, since they didn't use the pool.
- It was also proposed to open the pool to the general public and charge a use fee.
- The pool was not originally fenced.
- Children under 10 were required to pass a swimming proficiency test before using the pool. Everyone 21 and under were required to show their “swim card” to enter the pool. A pool committee enforced the rules and supervised pool use at all times but did not act as lifeguards.

# Summerfield 50<sup>th</sup> Anniversary Fun Facts



- The house to the west of the pool on Oakfield was the builder's sales office and model home. During construction, a miniature model of the neighborhood was on display in the garage.
- The most important landmark in the Summerfield neighborhood, at least to kids over the years, is the large rock by the pool. This rock has been a popular meeting place for several generations of children. Jumping off the highest point of the rock has served as the neighborhood rite of passage.
- The most famous Summerfield resident was possibly Poway High graduate Kellye Cash, Johnny Cash's grand niece, who went on to become Miss America in 1987.



# Summerfield 50<sup>th</sup> Anniversary Fun Facts



- Strangest violation notice was in 1976 for a horse in someone's front yard, on a regular-sized lot.
- Approximately 125 to 150 people have served on the Summerfield HOA Board in the past 50 years. This does not include all the people who served on various committees over the years. Currently the only official committee is the Architecture Committee, which was first convened in 1978. There is also an informal party-planning committee now. Past committees included a pool committee for enforcing pool rules, a baby-sitting committee and a safety committee.
- All these volunteers have helped maintain and improve our great neighborhood!

# Treasurer's Report



- 2022-2023 YTD Financial Position
- 2022-2023 YTD Budget vs. Actuals
- 2023-2024 Budget & Dues

# 2022-2023 YTD Financial Summary



- The statement below reflects the HOA's account summary as of May 18, 2023. Estimate \$3,500 expenses remaining thru end of June

## Summerfield Homeowner's Association

### Statement of Financial Position

As of May 18, 2023

	TOTAL
▼ ASSETS	
▼ Current Assets	
▼ Bank Accounts	
Chase Checking	38,445.76
Chase Reserve	100,785.01
Chase Savings	3,475.21
Funds Clearing	0.00
<b>Total Bank Accounts</b>	<b>\$142,705.98</b>
▼ Accounts Receivable	
Accounts Receivable	0.00
<b>Total Accounts Receivable</b>	<b>\$0.00</b>
▶ Other Current Assets	<b>\$0.00</b>
<b>Total Current Assets</b>	<b>\$142,705.98</b>
▶ Fixed Assets	<b>\$0.00</b>
<b>TOTAL ASSETS</b>	<b>\$142,705.98</b>
▶ LIABILITIES AND EQUITY	<b>\$142,705.98</b>

# 2022-2023 YTD Budget vs. Actuals

## Summerfield Homeowner's Association

### Budget vs. Actuals: SHOA FY\_2023\_2024 - FY23 P&L

July 2022 - June 2023

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
▼ Revenue				
Escrow Transfer Fee	155.00	300.00	-145.00	51.67 %
Homeowner's Dues	61,014.71	62,280.00	-1,265.29	97.97 %
Interest Income	0.30	0.30	0.00	100.00 %
Late Fees		50.00	-50.00	
Tax Refunds		50.00	-50.00	
Unapplied Cash Payment Income	-205.29		-205.29	
<b>Total Revenue</b>	<b>\$60,964.72</b>	<b>\$62,680.30</b>	<b>\$ -1,715.58</b>	<b>97.26 %</b>
GROSS PROFIT	\$60,964.72	\$62,680.30	\$ -1,715.58	97.26 %
▼ Expenditures				
Accounting	630.00	1,250.00	-620.00	50.40 %
HOA Membership	320.00		320.00	
Insurance	340.00	5,900.00	-5,560.00	5.76 %
▸ Landscaping	<b>10,580.10</b>	<b>11,000.00</b>	<b>-419.90</b>	<b>96.18 %</b>
Legal Fees	950.00	950.00	0.00	100.00 %
▸ Pool	<b>11,536.47</b>	<b>13,349.00</b>	<b>-1,812.53</b>	<b>86.42 %</b>
▸ Postage and Delivery	<b>237.36</b>	<b>550.00</b>	<b>-312.64</b>	<b>43.16 %</b>
Repairs & Maint.		470.00	-470.00	
▸ Social Events	<b>223.07</b>		<b>223.07</b>	
▸ Supplies		<b>35.00</b>	<b>-35.00</b>	
Tax Preparation/Annual Rept	1,700.00	2,000.00	-300.00	85.00 %
Taxes, Licenses & Permits	31.20	35.00	-3.80	89.14 %
Uncategorized Expense		310.00	-310.00	
▼ Utilities				
Gas and Electric	4,379.43	5,000.00	-620.57	87.59 %
Water	10,149.49	10,000.00	149.49	101.49 %
<b>Total Utilities</b>	<b>14,528.92</b>	<b>15,000.00</b>	<b>-471.08</b>	<b>96.86 %</b>
Website	210.36	215.00	-4.64	97.84 %
<b>Total Expenditures</b>	<b>\$41,287.48</b>	<b>\$51,064.00</b>	<b>\$ -9,776.52</b>	<b>80.85 %</b>
NET OPERATING REVENUE	\$19,677.24	\$11,616.30	\$8,060.94	169.39 %
NET REVENUE	\$19,677.24	\$11,616.30	\$8,060.94	169.39 %

# 2023-2024 Budget & Dues

## Summerfield Homeowner's Association

Budget Overview: SHOA FY\_2023\_2024 - FY23 P&L

July 2022 - June 2023

	TOTAL
<b>Revenue</b>	
Escrow Transfer Fee	300.00
Homeowner's Dues	62,280.00
Interest Income	0.30
Late Fees	50.00
Tax Refunds	50.00
<b>Total Revenue</b>	<b>\$62,680.30</b>
<b>GROSS PROFIT</b>	<b>\$62,680.30</b>
<b>Expenditures</b>	
Accounting	1,250.00
Insurance	5,900.00
Landscaping	
General Maint	11,000.00
<b>Total Landscaping</b>	<b>11,000.00</b>
Legal Fees	950.00
Pool	
Pool Area Maintenance	1,500.00
Pool Cleaning & Maint.	11,500.00
Pool Permit	349.00
<b>Total Pool</b>	<b>13,349.00</b>
Postage and Delivery	
Postal Box Rental	200.00
Stamps/Mailing	350.00
<b>Total Postage and Delivery</b>	<b>550.00</b>
Repairs & Maint.	470.00
Supplies	
Office	35.00
<b>Total Supplies</b>	<b>35.00</b>
Tax Preparation/Annual Rept	2,000.00
Taxes, Licenses & Permits	35.00
Uncategorized Expense	310.00
Utilities	
Gas and Electric	5,000.00
Water	10,000.00
<b>Total Utilities</b>	<b>15,000.00</b>
Website	215.00
<b>Total Expenditures</b>	<b>\$51,064.00</b>
<b>NET OPERATING REVENUE</b>	<b>\$11,616.30</b>
<b>NET REVENUE</b>	<b>\$11,616.30</b>

- The statement on the left reflects our 2023-2024 Budget.
- SHOA annual dues of \$360 per property
- Invoices mailed in June & payment due by July 31<sup>st</sup>

# 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 sidebar menu with white text listing: Home, HOA Board, Newsletter, Policies & Forms, Meetings & Events, Map, FAQ, Contact Us, Announcements, a search bar with a "Search" button, and Recent Posts (with one post titled "Spring 2017 Newsletter Posted"). The main content area has a white background with a torn-edge effect on the right side. It features a "Home" heading, a photograph of a house, and a welcome message: "Welcome to Summerfield—a neighborhood on the border of San Diego's Rancho Santa Fe. Summerfield has been a desirable San Diego County Summerfield residence." Below this is 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", and "summerfieldpoway@gmail.com".


# 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.

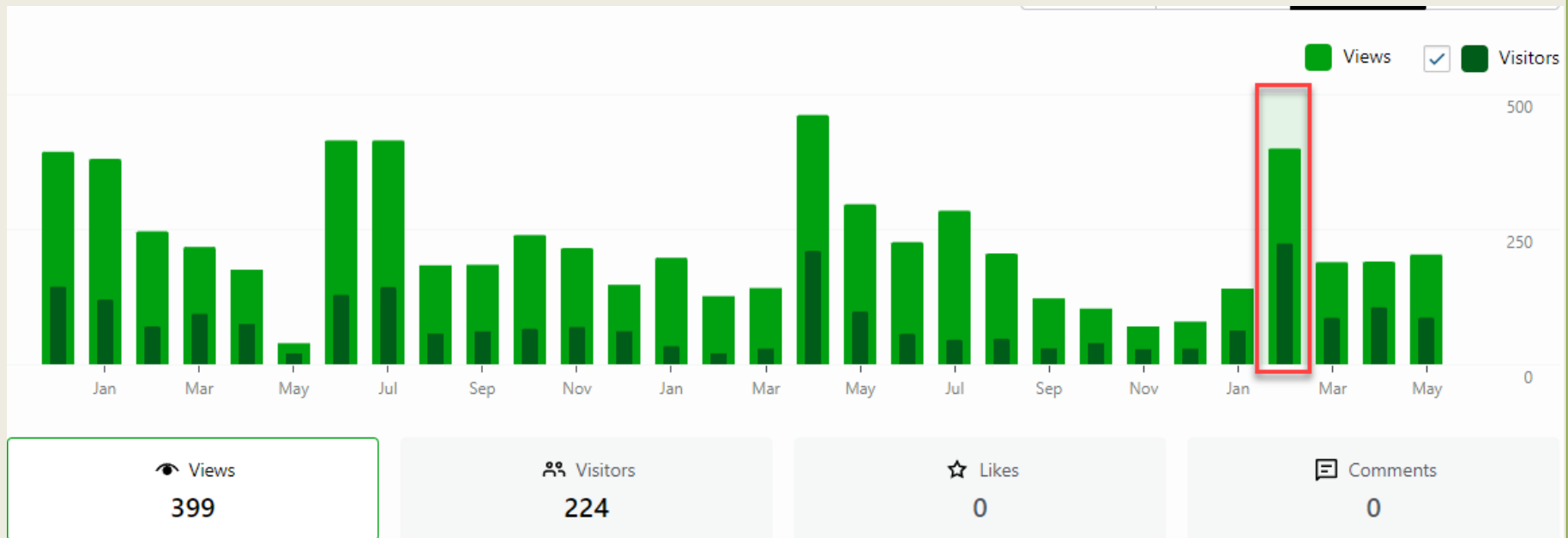
**New to the Neighborhood? Start here!**

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: Feb 2023: Scoops





# Communications Report



- Website View Stats 2023 Year to Date

Posts & pages	Views
Home	438
Summerfield Scoops - February 2023	237
Policies & Forms	85
The Pool is Open for 2023 - AND - Pool Area Cleaning Help ...	55
Summerfield Annual HOA Meeting - Poway Sheriff Dept - 50...	44
HOA Board	38
New to the Neighborhood	36
Announcements	29
Public Safety and Services	29
Newsletter	19

# Communications Report



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

# Communications Report

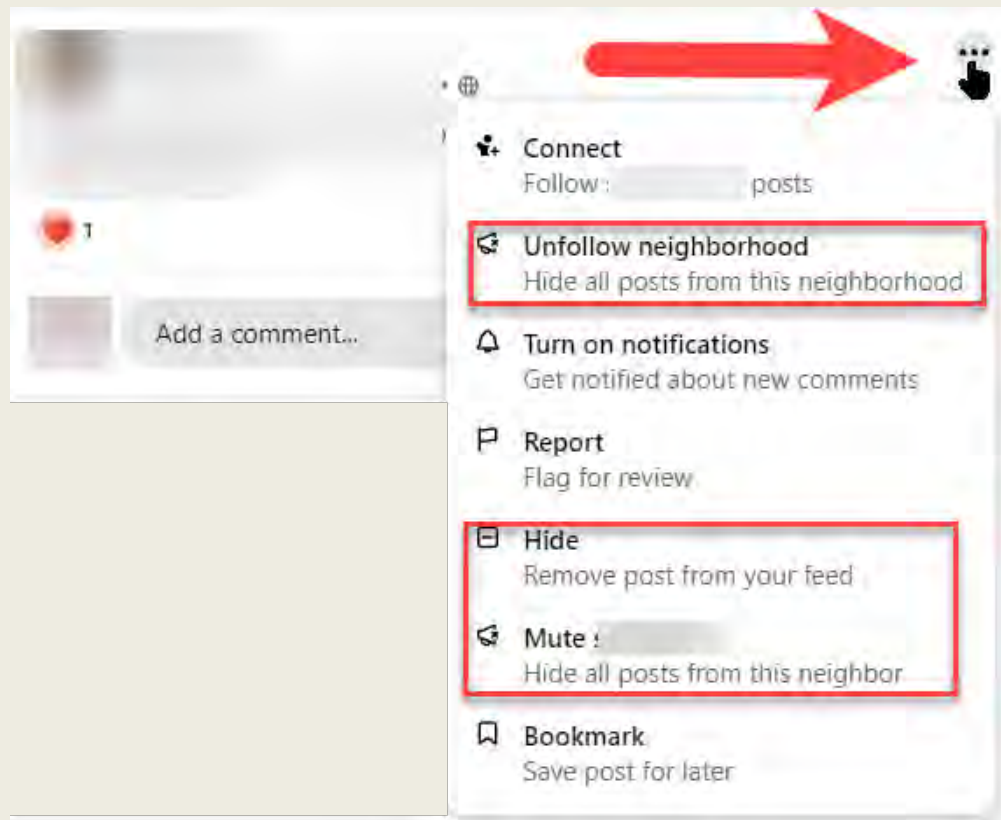


- Facebook Private Group
  - Best for lost and found/just our neighborhood info
- NextDoor – Getting the most out of it
  - Choose your privacy settings
  - Choose whether and how often to get emails
  - Follow the NextDoor Community Guidelines, boiled down to "Everyone here is your neighbor. Treat each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



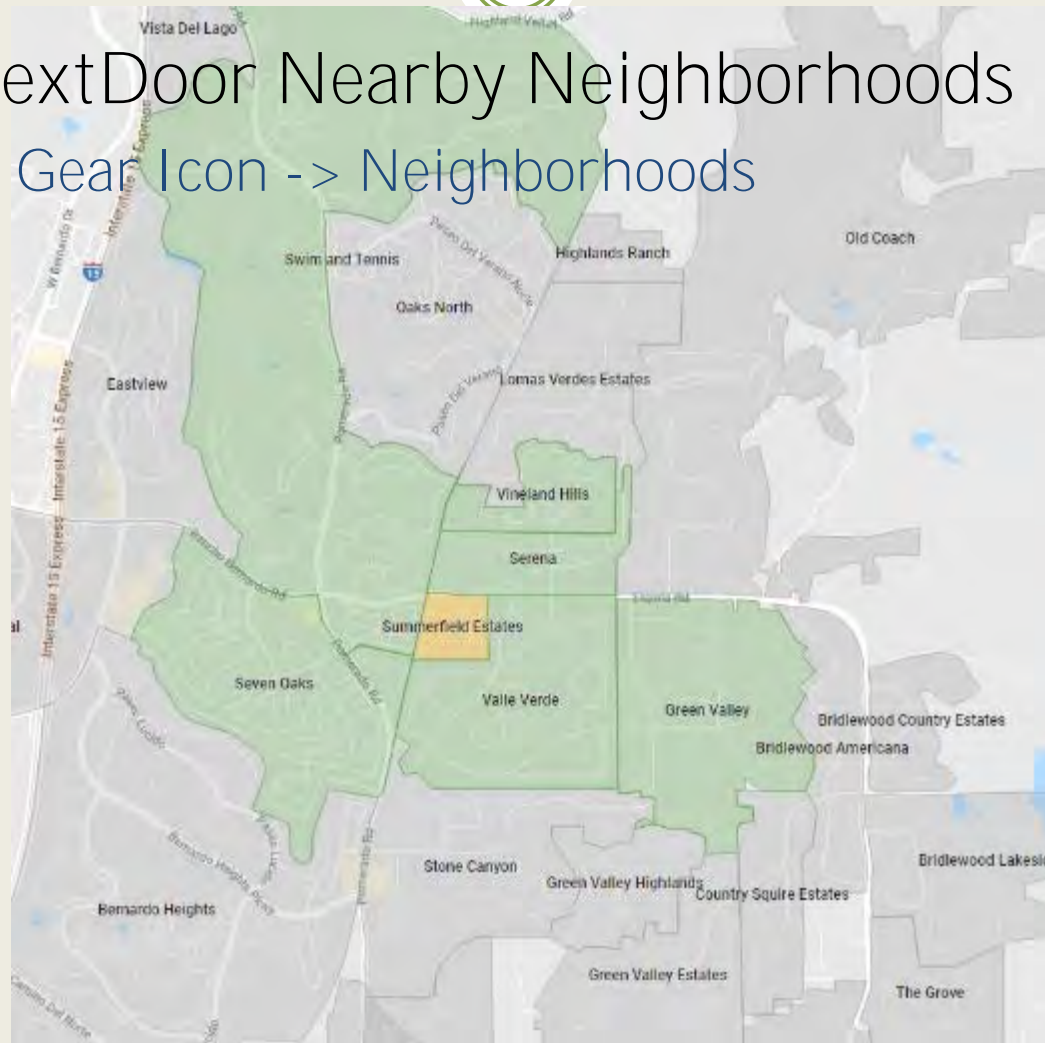
- NextDoor – Getting the most out of it
  - Unfollow, Hide posts or Mute problematic posters



# Communications Report



- Choose NextDoor Nearby Neighborhoods
  - Profile -> Gear Icon -> 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

## *Completed Projects*

- New Pool Service Company
  - Ended relationship with John at Living Water due to service and pool cleanliness issues
  - Hired Simpson Pool & Spa as new pool service vendor
- Automated Pool Chemical System
  - Worked with Simpson to install new automated chemical system for pool; works proactively via programming to keep pool chemistry consistently balanced while also saving labor costs



# Special Projects

## *Completed Projects*



# Special Projects

## *Completed Projects*

- Pool Pergola & Structure Repair
  - Replaced several structural pieces of pergola and trim pieces on pump/restroom building that were damaged or rotted
    - *Structural posts*
    - *Joists + slats*
    - *Exterior ribbon joists*
  - Repainted and treated for termite mitigation

# Special Projects

## *Completed Projects*



# Special Projects

## *Completed Projects*

- Various Other Pool Repairs
  - Replaced automatic fill valve; uses float to detect low water level (typically due to evaporation) and automatically refills pool
  - Revised filter pipe routing in pool room & reprogrammed filter schedule to improve efficiency and reduce electricity usage
  - Ongoing repairs on solar water heating systems as leaks occur

# Special Projects

## *Upcoming/Future Projects*

- Eventual Gate Replacement
- **Men's Restroom Urinal Repair**
  - Sticking valve caused excess water usage during off-season; currently out of order until a plan for repair or replacement is created
- Additional Small Repairs
  - Restroom lock cylinders
  - Pump room security latch

# Special Projects

## *Ongoing Service Management*

- Pool Service
  - Working with Simpson Pool and Spa since January 2023
- Pool Area Cleaning
  - Neighborhood high school student cleaning restrooms and emptying trash on a weekly basis
- Common Area Lawn Service
  - Continuing relationship with Advanced Landscape

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

# Election Status



- 2023 Election

- The annual election was not held this year because:
  1. There were no new volunteer candidates to run for the open seat that was to be filled in this election
- The open seat will continue to be held by the current board member Tom Halfaker (President)
- 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