



**Weathersfield Service Group
Manager's Report
January 27, 2017**

Financials

As always, once approved monthly financials are posted on the community website. Tara continues to work closely with Bob, Hoyt & Julie, the HOA Accountant (CPA) on reporting the HOA financials. As we have discussed for years now, WSG chooses to do its financials different than all the rest of our clients, so this special reporting is extra manual work for the Berkeley team. That said, Tara continues each month to do this reporting so that all stakeholders are comfortable with the financial actuals.

Finally, now that the 2016 financials are complete, it is time for Bob & Hoyt to begin work with Julie on preparing, reviewing & signing the IRS required tax return. As the Board knows, all this work is done outside of the Berkeley support (and our contract). Julie will finalize the return next month & the Board must assign a delegate to sign the return. Last year Zana signed the return.

Work Orders

Since the last report, we have 13 new work orders & have closed 11 work orders. As we have been reporting for well over a year, a short amount of detail on the new work orders is included in this report, please see the last page. What is interesting for the Board to know is that HOA members tend to drive 2-3 work orders per week, while the average Berkeley client tends to drive 2-3 work orders per month. We only point this out, as work orders tend to directly connect to the HOA financial resources being spent.

Landscaping

Winter services is in effect for all WSG. Specifically, this means Ruppert and/or Patsy is only on site when there is actual landscape work to do, which tends to only be 1-2 times per month. All of this is per the contract, as the winter season tends to be very low work for landscaping (mostly because nothing grows in the winter). Nancy (as the Berkeley contact) is very aware of the winter schedule. Nancy does talk on the phone with Patsy 2-3 times per week, even in the winter.

Davey Tree Experts were on site in mid-January. Keith, the owner of Davey, looked at all the hollies in the community (on common land) and is now working with Nancy to come up with a plan as to how the HOA should address the mature and/or dying holly trees. This is a project has been looked at for a few years now, with no firm action taken by the Board. That said, there are many of these hollies that can no longer be maintained and need to come out. Nancy will discuss with the Board as soon as she has a plan. Davey also looked at a few small tree removal projects that have come to the attention of the landscape committee. Davey will be on site in the next few weeks removing a few of these trees.

Next Ruppert, per the contract, removed Christmas trees throughout the property. They have been working on some winter pruning and will continue to edge, trim and blow during their visits. Ruppert reports directly to Nancy weekly. Nancy is very aware of the Ruppert schedule all year long.



Landscape (continued)

It is important to note, Berkeley continues to get 1-2 messages each day about landscape. The members of the community continue to think & act as though the landscape services are unique & specialized just from them, meaning that all 104 units have the potential to request for special handling of landscaping. Because this is not possible with a community wide landscape contract, Nancy has been working to set standards for both Ruppert & Patsy to use, so the services is very consistent throughout WSG.

Special Projects

Berkeley secured three bids, per the Board's direction, for blowing off all roofs. Greg Tilley was selected for the project. Michelle will work with Greg to set a schedule, including any specific instructions for residents to follow. As always, Berkeley will communicate directly with residents on the timing of this project. Communication will include mailings, posting on the website & sending out an e-newsletter.

Next, Peggy is working with the Utilities Committee to manage the special community wide sewer project, which will be directly managed by RLT & Associates. Just as soon as the Board approved the RLT contract (pricing & scope of work) the project will be started. The hope is the Board approves very soon.

Other Items (which require Berkeley's action)

A special request was made by a resident that the HOA pay for removing squirrels from the homeowner's attic. Current WSG policy to Berkeley is that the HOA does not paid for removal of animals from crawl spaces, attics, or any part of the home. Well over 3 dozen e-mails & phone calls have been circulated on this item. Peggy has some details about this one that will be discussed at Friday's Board meeting.

Next, Jo has requested that a procedure for residents to follow when they have plumbing problem be created & then communicated in this Manager's Report. That said, here is that new process:

1. If a resident has a sewer (or water) back up in the house, they should first call a plumber and second inform Berkeley. The owner is responsible for any plumbing issue in the home and in the area between the home and the HOA sewer line. The company (RLT) handling the sewer project can do regular plumbing as well as large-scale work; however, since the resident is paying they can and should hire whomever they want for this work; also, by letting Berkeley know, there is nothing for Berkeley to do than to be aware that a homeowner has a plumbing issue
2. If the plumber hired by the resident reports that they feel the problem lies with the HOA, as the problem is on HOA owned common land, the resident must call Berkeley back to report this new finding; at that point, Berkeley will call RLT and open a service ticket. Special note, the owner's plumber should never attempt any repair on HOA property
3. Next, RLT will work on the project until the problem is resolved; it is noted these types of repairs can run close to \$10,000 and while every attempt will be made to gain Board approval for such expense, in no way will the RLT work stop because a Board member cannot be found for approval of the billing; again, time permitting Berkeley will do all it can to alert the Board President



Other Items (continued)

4. One final & important reminder to all WSG residents: please remember do not put anything besides toilet paper into the toilets. Grease, hand wipes, paper towels, etc., often can and do cause drains to clog

Berkeley Website

As the Board knows, Berkeley has built & maintains a free website for WSG to use for sharing information about HOA issues. As has been the case for 2 years now, Berkeley does not charge for this service. That said, the free website has limited functionality, specially it only can handle 1-2 posting per month & at most 1-2 e-newsletter announcements. We are very aware the Board has budgeted money to create a professional website to share even more WSG news. Berkeley hope this new site will go live very soon.

WSG Workload

Just so the Board is aware, about 50% of all work that comes into the Berkeley team is generated from WSG, with our other 11 accounts making up for the other 50% of Berkeley work. By far WSG residents use the phone to communicate with Berkeley. We continue to ask that residents do the following (1) first check the community website to see if the information they are looking for is already posted, (2) if they still need help consider sending an e-mail to Michelle with details of where they live, how to contact them & what the exact issue is, (3) consider texting to the office cellphone details of what they need and (4) calling the office for help.

As a friendly reminder, the Berkeley offices are staffed M-F from 10am to 2pm. In addition, Berkeley has an answering service that answers the phone 7 days per week, 24 hours per day, 365 days per year. If they receive a call they feel is a true emergency, the answering service will contact Berkeley ownership for immediate action. Furthermore, the Board President has cellphone info for both Tony & Peggy.

Last, Berkeley, per our contact, is committed to following up to all requests in 16 business hours. The reality is we are setup to quickly respond to e-mails first, texts second and phone calls last. Also, it is worth pointing out that many questions can be answered just by visting the community website.



WSG Work Orders
Since last report

<u>Close Address</u>	<u>Description</u>
589	garage door
595B	paint railing
535	garage door
509	garage door
509	paint railing
559	roof leak
541	paint front door
553	leak and rotten wood
564	rehang shutter
536	garage door
595A	roof leak
595C	ground light
518	repair shingle