



Anniston Home Owner's Association
2023 Budget Meeting

Agenda

2023 Budget Review (Dan, Tim, Kayla)

- Review of each major expense area
- Open Discussion

Neighborhood Safety & Security (Dan)

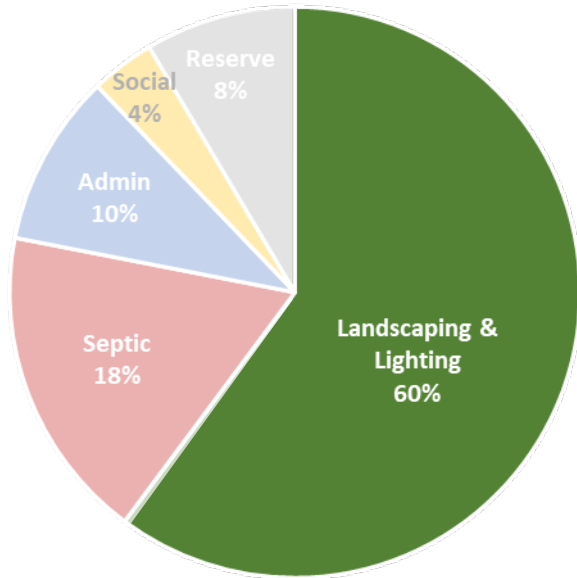
Copper Pine development update (Dan)

- Standalone community
- Collaboration on potential trail enhancement and expansion

2023 Yard Sale Event (Kayla)

Other Topics from Community Attendees

Landscaping & Lighting



	2022 <u>Budget</u>	2023 <u>Budget</u>	<u>Budget Review Comments</u>
LANDSCAPING & LIGHTING	\$ 95,630	\$ 116,105	
Landscaping - Contract	\$ 52,980	\$ 55,140	
Landscaping - Pine Needles	\$ 5,500	\$ 6,400	Terragreen 2023 Contracted pricing
Landscaping - Annuals	\$ 4,400	\$ 4,320	10.2% net increase for 2023
Playground Mulch	\$ 750	\$ 900	Inflation escalators for 2024, 2025
Other Mulch	\$ -	\$ 3,345	
Electricity - Street Lights, Entrance, Well & Irrigation	\$ 8,400	\$ 8,400	Full Year F'Cast of \$8,434
Landscaping - Trail Aggregate Maintenance		\$ 2,000	2023 added line item
Landscaping - Trail Tree/Brush Maintenance		\$ 12,000	2023 added line item
Landscaping - Other Tree Removal/Trimming	\$ 6,600	\$ 6,600	Anniston Way and other HOA Common areas
Landscape Maintenance Repairs & Other	\$ 6,000	\$ 6,000	irrigation and landscaping repairs
Other Maintenance and Enhancements	\$ 11,000	\$ 11,000	well, lights/electrical, signs, fencing, landscaping

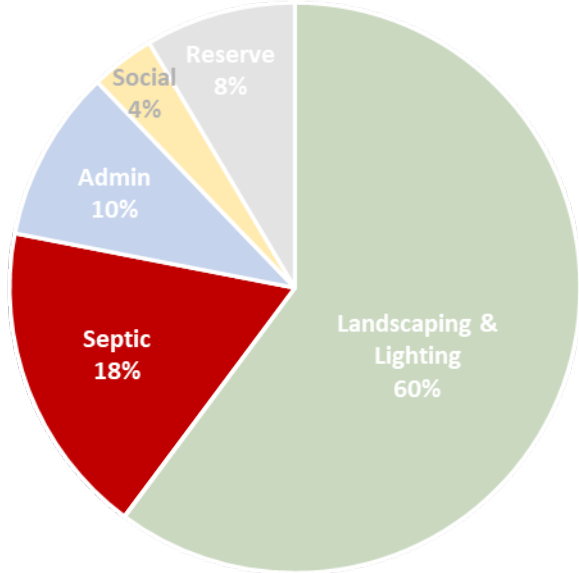
Primary drivers for budget increase

- Terragreen inflationary increase across all areas of service. Some potential to mitigate Mulch costs through other providers or solutions.
- Due to an aging treescape and strong storms maintenance required is at levels far greater than when the community was younger. Significant cost will be required to get the trail back to an acceptable state. Recent quote for \$12K per day of work, with 2-3 days estimated to be required. Plus aggregate.
- HOA Board is exploring with Copper Pine developer the enhancement of the walking trail, our primary neighborhood amenity, and connecting the Walking Horse Trail / Copper Pine area to the existing trail. This longer trail would require incremental annual maintenance.

Advance Questions from the Community

- Annuals. “Why are we spending over \$4,000 annually on annual plants?...” This budget item was expanded a few years ago at request of multiple residents to improve beautification of the entrance to the neighborhood, with positive feedback from many residents since that time.
- Other Maintenance & Enhancements. “What is in other maintenance and why has it doubled since 2021?” It is a miscellaneous line item per the comments in the budget. It has doubled due to overages routinely experienced in a variety of areas that limited neighborhood enhancements – well repairs, electrical repairs, fence maintenance, signs, etc.

Septic



	2022 <u>Budget</u>	2023 <u>Budget</u>	<u>Budget Review Comments</u>
SEPTIC INSPECTION			
Septic Inspection	\$ 25,500	\$ 34,489	Carolina Low Pressure 2023 Contract

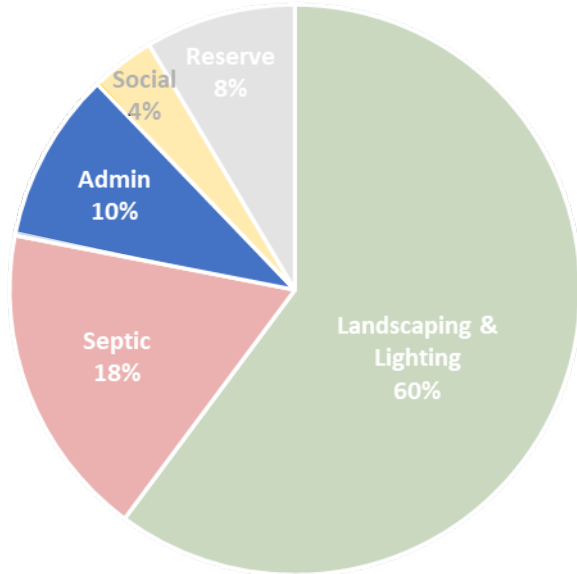
Primary drivers for budget increase

- Incremental homes mean a greater total value for septic inspections (though not a greater cost per homeowner)
- Significant number of complaints with existing septic provider due to quality of inspections, lack of communication, and overall lack of professionalism
- Existing septic inspection provider was seeking an increase anyway, so we took the opportunity to migrate to a new provider per numerous homeowner requests that has a better reputation

Advance Questions from the Community

- None

Administration



	2022 <u>Budget</u>	2023 <u>Budget</u>	<u>Budget Review Comments</u>
ADMINISTRATION	\$ 15,794	\$ 18,850	
Management Fees	\$ 9,888	\$ 10,872	Increasing from \$824/month to \$906/month
Management Administration	\$ 1,500	\$ 3,000	FY F'Cast of \$2,944
Office Supplies and Printing	\$ 600	\$ 1,000	FY F'Cast of \$929. Meeting printouts, other doc copies
Accounting and Tax Preparation Fees	\$ 450	\$ 450	FY F'Cast of \$438
Insurance	\$ 1,196	\$ 1,196	
Legal Fees	\$ 1,800	\$ 1,800	
Website Expense and Meeting Space	\$ 360	\$ 532	web hosting, plus ~4 in-person meeting expenses

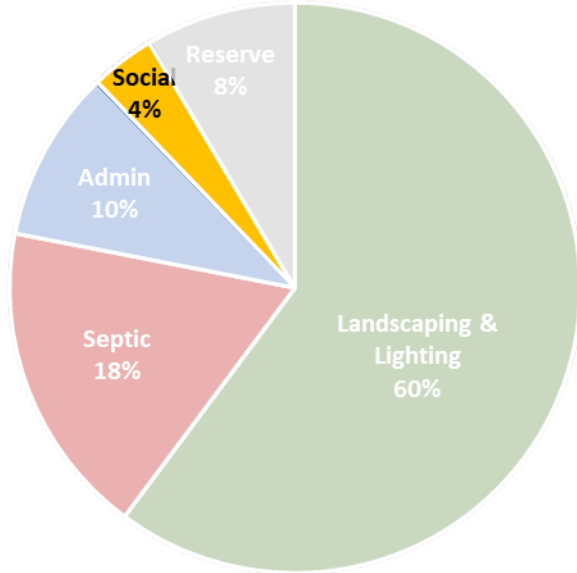
Primary drivers for budget increase

- Cedar increase in base Management Fees
- Increased cost and volume with other Cedar activity-based expenses

Advance Questions from the Community

- **Management Administration.** “What is the management administration cost and why has it risen to more than triple what it was in 2021?” Activity-based costs such as working with vendors on the HOA’s behalf for quotes, maintenance requests, etc. as well as administration of violation process and architectural reviews. Costs and volume have increased, and we are on track this year for close to \$3,000 (over budget).
- **Office Supplies & Printing.** “What is in the category and can we do anything to lesson?” Costs for Cedar provided copies and office supplies provided, primarily at HOA meetings. If homeowners are OK with less paper distribution and more links to online document postings this is something we can likely help reduce.
- **Insurance.** “Have we quoted out the neighborhood insurance policy to a few other local agents to ensure we have the best coverage for the cost?” This is not an area the board has explored due to priorities, relative contribution to overall expenses, and expertise. The board would welcome neighborhood volunteers with insurance insights they can bring and the time and desire to pursue.

Social



	2022 Budget	2023 Budget	
SOCIAL	\$ 1,500	\$ 4,000	
Holiday Lighting & Decorations	\$ -	\$ 2,000	
Social Committee	\$ 1,500	\$ 2,000	★

Budget Review Comments

Additional funding may be available upon Social Committee request and board discretion

★ Initial budget for social was \$5000. Rolled back to \$2000 with balance allocated to second round of pine needles in 2023.

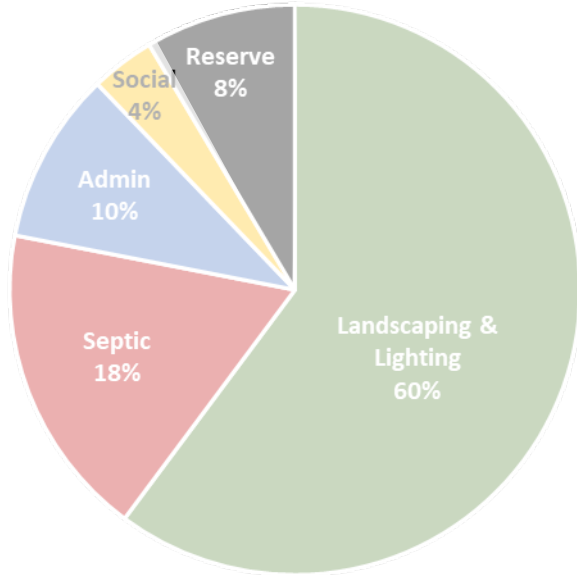
Primary drivers for budget increase

- Cedar increase in base Management Fees
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Advance Questions from the Community

- Holiday Lighting. “What does that quote entail?” It is not a quote; it is an estimated budgetary amount. To date lighting and decoration at the front entrance has been typically handled by a single resident with little support from the broader community. Request from the community for further decorations plus the resident’s desire to “retire” from entrance decorations drove the budget line item for a 3rd party to handle this which usually involves first year purchase of decorations and then then an annual fee for installation and removal for each respective holiday.
- Social Committee. “[Besides the plans from the social committee what else does this include, as the social committee plans do not reach \$5,000?” 2022 Budget plus additional plans for some combination of back-to-school bash, summer kick-off event, adult events.

Reserve



	2022	2023	
	<u>Budget</u>	<u>Budget</u>	<u>Budget Review Comments</u>
RESERVE FUNDING	\$ 8,116	\$ 16,469	
Reserve Funding	\$ 8,116	\$ 16,469	

Primary drivers for budget increase

- Saving for anticipated lump-sum expenses required for trail enhancement and extension
- Saving for rework of playground area (playground, parking, pavilion?)
- Buffer against continued future inflation
- Buffer against unanticipated budget overages (well, large storm damage to common areas, etc.)

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Other Topics from Community Attendees

Safety & Security

- A fellow resident's home was burglarized on Friday, December 2nd.
- The resident has been working with neighbors and the Iredell County Sheriff's Department to provide any information and evidence that may identify the criminals and lead to arrest and property recovery.
- While thankfully no one was home at the time of the incident and no one was hurt, the residents involved will be dealing with the losses and overall stress from enduring such a difficult situation. Please keep this neighbor in your thoughts as they work through this very challenging time.
- According to the Sheriff's office, while our neighborhood has experienced the occasional car break-in this is the first time they recall a burglary of this magnitude occurring within Anniston. So far this appears to be an isolated incident.
- While we won't be sharing more details out of privacy for our fellow neighbor, we felt it important to make everyone aware of the incident.

Safety & Security

We want to take this opportunity to remind neighbors of the following, especially during this holiday time when many are away from their homes for extended periods of time.

Areas that security professionals recommend one for their home to help deter break-ins:

- Locks. Ensure door and window locks are properly secure for your home and any other detached garages or utility buildings on your property. Keep your car doors locked and your garage closed in the evenings and when you are away.
- Lighting. Motion sensitive flood lights for backyards can be used to enhance security and deter criminal activity. If you notice a light post on your street is not working, please contact Energy United to report the outage and submit a repair request.
- Monitoring. Self- or Third-Party monitored alarm systems with cameras, motion detection, and sirens can provide some deterrence but will not eliminate the threat of a burglary.
- Communication. Talk to your neighbors and let them know when you will be away for extended periods, when you will have contractors at your home, etc. so that they can better know when suspicious activity may be occurring.

In particular if you are away for an extended period of time during the holidays, some things that are recommended:

- Don't allow daily deliveries of mail, newspapers or flyers to build up while you are away. Arrange with the Post Office to hold your mail, or arrange for a friend or neighbor to take them regularly.
- If you have smart home devices, law enforcement recommends having lights turn off and on at various times to provide an appearance of someone being home.
- Communicate with neighbors to let them know when you are going to be away so any unexpected activity can be reported.

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Copper Pine Development

- The developer (Treenail) has elected to pursue the development separate from Anniston due to
 - (a) desire for stricter HOA covenants and
 - (b) desire for total control over architectural approvals.
- Intent is for ~20 homes with Arthur Rutenberg ([AR Homes® by Arthur Rutenberg](#))
- The HOA Board will continue to work with the developer in exploration of an enhanced and extended trail to link the Walking Horse Trail / Copper Pine areas to the existing trail, including a bridge across the creek area.
 - The developer has expressed a willingness to fund 50% of the project even though only 20-30% of the trail expansion would be within the Copper Pine community.
 - The developer is working with his attorneys to understand the legal framework of how this new development might contribute (capital contributions and annual fees) in order to be able to use this joint trail on an ongoing basis.
 - The developer indicated he would want to get a few houses completed before investing in this trail project.

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