

# Sub-HOA | Dashboard



## Our Mission

The mission of the [REDACTED] Neighborhood Association is to show **love** for our neighbors by serving our community with **integrity** – promoting **fairness**, protecting **property values**, and fostering a **peaceful, neighborly** environment. We are **individually and collectively** as a board, committed to ensuring the efficient and optimal use of **operational funds** and maintaining **strong reserves** to support future repairs and community improvements.

## Our Vision of Success for 2026



By December 31, 2026 we will as a board have achieved these goals:

1. Successfully moved to our new management company, [REDACTED] by October 1, 2026 if not sooner.
2. Managed our 2026 operational expenses to be on or under what we budgeted.
3. Increased our reserves from 70% to 76% of the accumulated depreciation.
4. Increased the interest received on the reserve fund from 0.28% to > 3-5% (by utilizing Money-Market Funds, CD's and Treasury Bonds) without adding risk by moving from the [REDACTED] to [REDACTED], utilizing the 'HOA Invest' software platform.
5. Implemented the new Community Rules especially with regards guest parking policy.
6. Completed roof inspections and general exterior inspections and where necessary, have had [REDACTED] remedy any work that should have been done prior to September 17, 2025.

At the end of 2026 we will measure our partnership effectiveness by:

- We will conduct a year-end rating of our MANAGEMENT COMPANY between us and source input from 3-5 other owners. If the rating is below an average of 9-10 ("Promoters") we will address the underperformance and make the necessary changes.
- We will conduct a year-end rating of each of our VENDORS between us and source input from 3-5 other owners. If the rating is below an average of 9-10 ("Promoters") we will address the underperformance and make the necessary changes.
- We will measure OWNER ENGAGEMENT by having an average of at least 10 people attend each board meeting and at least 50% vote in any ballots.
- We will measure BOARD MEMBER EFFECTIVENESS by self-rating and rating each other for collegiality (how we work) and commitment (showing up on time and getting things done in a timely manner). Our goal is both ratings for each person to be in the range of 9-10 (out of 10).

## Our ULTIMATE SUCCESS METRICS are:



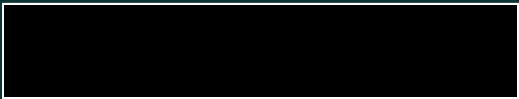
1. Reserves at **100%** ASAP
2. No special assessments **ever**
3. No dues increases > 10% **ever**

## OUR VALUES

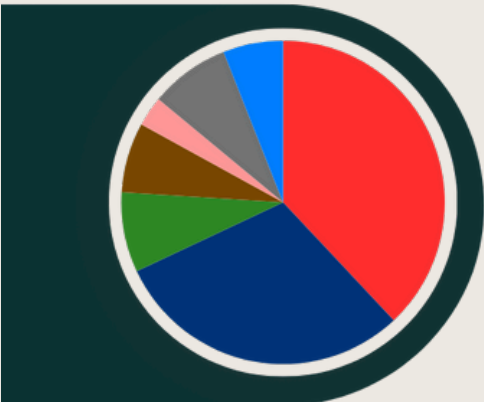
*(How we will work together as a board, for our owners through our vendors);*

H = Help Each Other  
O = Owner-Centered  
A = Accountable For Funds





## Where do my dues go?



- Insurance 38%
- Reserves 30%
- Landscaping 8%
- Management 7%
- Debt Collection 3%
- Other Expenses 8%
- Free Cashflow 6%

Source: October 2025 year-to-date

## Why did dues increase for 2026?

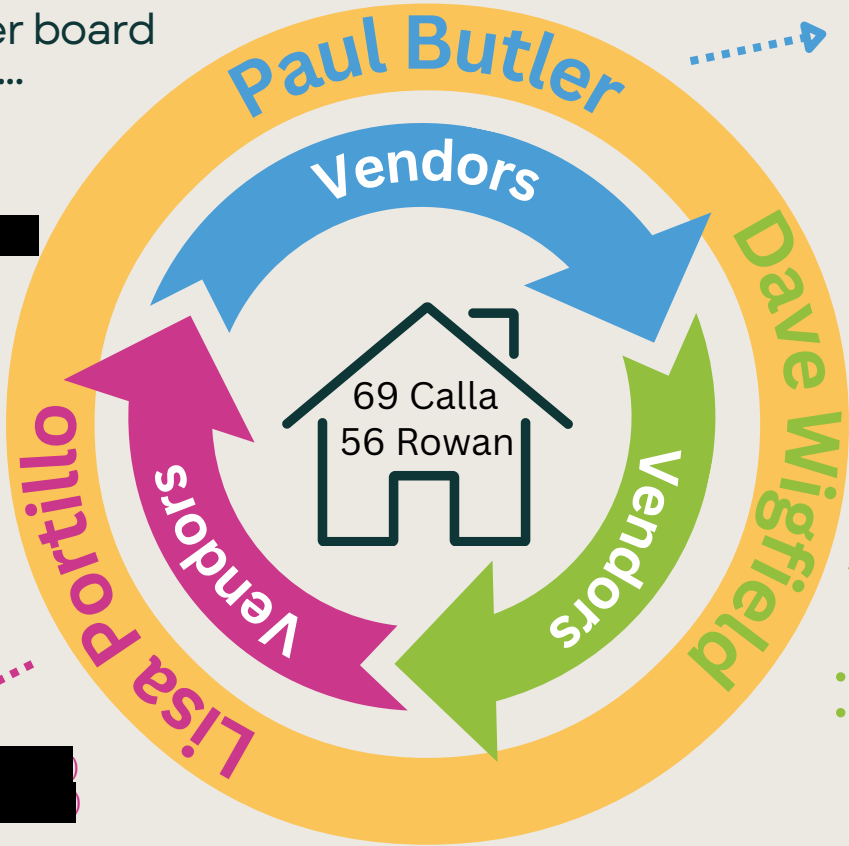


Increase in dues income for 2026 = [redacted]  
New costs for 2026: [redacted] | Mulch = [redacted] approx  
Higher costs for 2026: Increase to reserves = [redacted]

Conclusion: The new and higher costs exceed the dues increase and the difference is achieved through strong operational expense control as the first, full homeowner board.

### Your homeowner board working for you ...

- All 3 of us oversee:
- Reserve Funds ([redacted])



- Management Company ([redacted]) changing to ([redacted])
- Insurance Broker ([redacted])
- Reserve Study ([redacted]) changing to ([redacted])
- Janitorial ([redacted])

- Landscaping ([redacted])
- Pest Control ([redacted])

- Patrol Services ([redacted])
- Electrical ([redacted])

