



# HICKORY RIDGE & THE RETREAT ANNUAL MEETING

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MONDAY, SEPTEMBER 28, 2020

# AGENDA —

MEETING TIME: 6:30 PM – 8:30PM

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- Welcome
- Introduction of Board Officers and Board Members
- 2020 in Review
- Property Management Company and Accomplishments
- Statement from each Officer
- Statement from each Board Member on their Committee
- Overview and Take-Aways
- Questions



# HOME OWNERS ASSOCIATION (HOA) OFFICERS AND BOARD MEMBERS:

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## Officers:

President: Frank Pendleton

Vice President: Ricardo Salazar

Secretary: Tara Doty

Treasurer: Jeff Miller

## Board Members /Committee Chairmen:

Landscaping: Ron Bradford \*

By Laws: Jay Orrell \*

ACC: Derek Lord

Social: Amy Shorter

Decorations: Gary Boardman

\* Note: Represents The Retreat at Hickory Ridge



# HOA PRESIDENT – FRANK PENDLETON

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- Welcome –
  - Separate sign-in sheets for Hickory Ridge and for The Retreat at Hickory Ridge
- 2020 - A Year in Review
  - Year unlike any other – dealt with Covid-19, Social Distancing, Masks, Travel Restrictions
  - Working to formalize the HOA Board, fill open positions and establish set practices
    - Have a full slate of board officers for 1<sup>st</sup> time in history of subdivision
    - If you are interested in being involved on the HOA Board, please contact me.
  - Brought in a new Property Management Company
    - Main Street Management
  - Regularly schedule HOA Board Meetings each month
  - Quarterly Newsletter
  - Contact Information: 904-424-8147 or [fependleton@comcast.net](mailto:fependleton@comcast.net)



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# PROPERTY MANAGEMENT COMPANY:

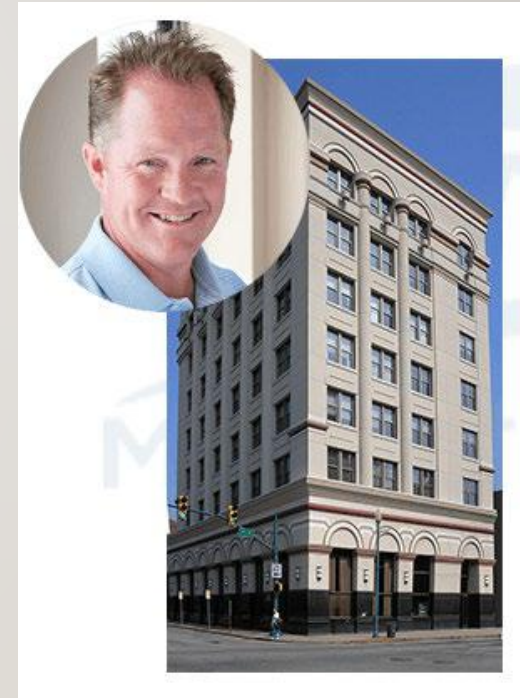
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Main Street Management, LLC  
133 North 4th Street  
3rd Floor  
Lafayette, IN 47902

Contact:

[randy.truitt@mainstreetmanagementllc.com](mailto:randy.truitt@mainstreetmanagementllc.com)

Direct - 765-701-4130



# 2020 ACCOMPLISHMENTS BY MAIN STREET MANAGEMENT:

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- Insurance Savings - Policy previously was covering street lights owned by Duke Energy.
- Connected the community with a new pond vendor.
- We established Business Entities for both communities since they were dissolved. Worked with legal counsel and CPA
- Filed taxes for all of the previous years which had not been done. Worked with legal counsel and CPA
- Reduced Trash Can violations by 3/4 .
- Finally gained compliance with the street parking on the Northside of Mondovi Blvd by the entrance.
- Worked with Trash Kans to get all the builders dumpsters off of the streets.
- Established separate billing from vendors for each community. Previously all invoices came to HR.
- Worked to Address a number of resident issues.
- Deciphered and recreated past due invoicing and account receivables from previous management company
- Started process to look into combining HOA's



# VICE PRESIDENT – RICARDO SALAZAR

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- Fills in and runs the meetings in the absence of the President
- Active in recruiting new board members
- Works closely with the Property Management Company regarding all ACC matters
  - Determines if ACC requests fall within scope of HOA Covenants and By-Laws
- Assists all Committee Chairmen when requested





# TREASURER – JEFF MILLER

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- Manages and works directly with Property Management Company on Financial Statements and Annual Budgets
  - One time charge to the State of Indiana for legal and penalty fees related to delinquency of filing registration with the State
  - Anticipated expense of repaving or sealing streets in The Retreat at Hickory Ridge (HOA owned streets)
- Financial Statements are verified against bank statements monthly to justify both revenue, expenses and cash available
- Homeowner must pay their HOA dues when billed
  - Hickory Ridge: \$11,681.89 – unpaid HOA dues
  - The Retreat at Hickory Ridge: \$1,940.72 – unpaid HOA dues
- Working on getting delinquent dues down to zero balance
  - Phone calls, letters, personal judgement and lien against property
- Top Expenses:
  - Trash Service – Republic Services (32%)
  - Contracted Management Company (14%)
  - Lawn Service (13%)
  - Electricity (11%)
- Homes in Subdivision:
  - Hickory Ridge: 135 homes
  - The Retreat at Hickory Ridge: 49 homes





# HICKORY RIDGE SUBDIVISION- 2020 BUDGET SUMMARY

- ✓ Current Balance - \$48,465.56
- ✓ Currently on a July 1- June 30 billing cycle
- ✓ Looking to change in 2021 to go to a Jan-Dec billing cycle
- ✓ In 2021 homeowners will be billed July - Dec

HICKORY RIDGE SUBDIVISION HOMEOWNERS ASSOCIATION, INC.					
2020 Summary (Thru August)					
	Income	2020 Budget	YTD	Estimated Sept - Dec	Estimated Jan - Jun 2021
40010	Operating	\$ 58,050.00	46,368.11	\$ -	\$ -
40060	Late Fee Income	\$ 650.00	353.73	\$ -	\$ -
40070	Finance Charge	\$ -	61.65	\$ -	\$ -
40210	Interest	\$ 210.00	-	\$ -	\$ -
	<b>Total Income</b>	<b>\$ 58,910.00</b>	<b>46,783.49</b>	<b>\$ -</b>	<b>\$ -</b>
Expenses					
50010	Building Maintenance & Repair		\$ 69.55	\$ -	\$ -
51010	Mowing & trimming	\$ 8,411.89	\$ 6,308.88	\$ 2,103.01	\$ 4,205.95
54040	Snow removal	\$ 1,000.00	\$ 472.50	\$ 250.00	\$ 200.00
54020	Pond Maintenance	\$ 3,000.00	\$ 6,031.02	\$ -	\$ -
60010	Utilities-Electric	\$ 7,000.00	\$ 2,288.00	\$ 1,200.00	\$ 1,800.00
60050	Trash	\$ 20,250.00	\$ 14,218.92	\$ 6,960.00	\$ 10,440.00
80020	Tax Return		\$ 50.00	\$ -	\$ 50.00
80030	Acctg/Profess. Fees	\$ 1,000.00	\$ 250.00	\$ -	\$ 250.00
80040	Legal	\$ 1,000.00	\$ 1,101.50	\$ -	\$ -
80050	Contracted Mgmt.	\$ 8,100.00	\$ 5,800.00	\$ 2,980.00	\$ 4,470.00
80000	Administrative	\$ 300.00	\$ 623.91	\$ 150.00	\$ 150.00
80080	Website	\$ -	\$ 140.00	\$ -	\$ -
80090	Insurance	\$ 1,071.00	\$ 364.32	\$ 242.88	\$ 364.32
90040	Property Tax	\$ 60.00	\$ -	\$ -	\$ -
80150	Business Registration Fee	\$ 22.00	\$ -	\$ -	\$ -
80235	Bad Debt	\$ 2,000.00	\$ -	\$ -	\$ -
80236	Bad Debt Recovery	\$ (3,000.00)	\$ -	\$ -	\$ -
90000	Other	\$ 2,500.00	\$ -	\$ -	\$ -
90050	Social Committee	\$ 1,500.00	\$ -	\$ -	\$ -
90060	Reserve Expenses	\$ -	\$ 855.00	\$ -	\$ -
90060	Long Term Reserve Savings	\$ 4,695.11	\$ -	\$ -	\$ -
	<b>Total Expenses</b>	<b>\$ 58,910.00</b>	<b>\$38,573.60</b>	<b>\$ 13,885.89</b>	<b>\$ 21,930.27</b>
	Checking Account (8/31/20)		\$ 36,783.67		
	Accounts Receivable (8/31/20)		\$ 11,681.89		
			<b>\$ 48,465.56</b>		

# THE RETREAT AT HICKORY RIDGE - 2020 BUDGET SUMMARY

- ✓ Current Balance - \$17,226.33
- ✓ Currently on a July 1- June 30 billing cycle
- ✓ Looking to change in 2021 to go to a Jan-Dec billing cycle
- ✓ In 2021 homeowners will be billed July - Dec

THE RETREAT AT HICKORY RIDGE SUBDIVISION HOMEOWNERS ASSOCIATION, INC.					
2020 Summary (Thru August)					
		2020 Budget	YTD	Estimated Sept - De	Estimated Jan - Jun 2021
<b>Income</b>					
40010	Operating	\$ 21,070.00	19,129.28	\$ 1,940.72	\$ -
40060	Late Fee Income	\$ 650.00	59.55	\$ -	\$ -
40070	Finance Charge	\$ -	10.38	\$ -	\$ -
40210	Interest	\$ 210.00	0.00	\$ -	\$ -
	<b>Total income</b>	<b>\$ 21,930.00</b>	<b>19,199.21</b>	<b>\$ 1,940.72</b>	<b>\$ -</b>
<b>Expenses</b>					
51010	Mowing & trimming	\$ 2,671.34	\$ 2,289.84	\$ 381.50	\$ 1,335.67
54040	Snow removal	\$ 800.00	\$ -	\$ 200.00	\$ 200.00
60010	Utilities-Electric	\$ 2,100.00	\$ 1,930.65	\$ 968.00	\$ 1,452.00
60050	Trash	\$ 6,912.00	\$ 4,095.95	\$ 2,048.00	\$ 3,072.00
80030	Acctg/Profess. Fees	\$ 900.00	\$ 3,500.00	\$ -	\$ 300.00
80040	Legal	\$ 750.00	\$ 1,117.95	\$ -	\$ -
80050	Contracted Mgmt.	\$ 2,940.00	\$ 1,980.00	\$ 980.00	\$ 1,470.00
80000	Administrative	\$ 164.79	\$ 298.11	\$ 25.00	\$ 150.00
80080	Website	\$ 207.50	\$ -	\$ -	\$ -
80090	Insurance	\$ 870.00	\$ 449.65	\$ 287.12	\$ 430.68
80150	Business Registration Fee	\$ 22.00	\$ -	\$ -	\$ -
80235	Bad Debt	\$ 1,000.00	\$ -	\$ -	\$ -
80236	Bad Debt Recovery	\$ (500.00)	\$ -	\$ -	\$ -
90000	Other	\$ 50.00	\$ -	\$ -	\$ -
90050	Social Committee	\$ 300.00	\$ -	\$ -	\$ -
90060	Reserve Expenses	\$ -	\$ -	\$ -	\$ -
90060	Long Term Reserve Savings	\$ 2,360.46	\$ -	\$ -	\$ -
	<b>Total Expenses</b>	<b>\$ 21,548.09</b>	<b>\$15,662.15</b>	<b>\$ 4,889.62</b>	<b>\$ 8,410.35</b>
	Checking Account (8/31/20)	\$ 15,285.61			
	Accounts Receivable (8/31/20)	\$ 1,940.72			
		<b>\$ 17,226.33</b>			

# SECRETARY – TARA DOTY

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- Records minutes at each monthly Board Meeting
- Minutes become record of meeting, votes and transactions for that month
- Established a Facebook page for Hickory Ridge
  - Called “Hickory Ridge Community Page”
- Administrator for Nextdoor App
  - Called “Hickory Ridge”





# POND COMMITTEE:

## NEIGHBORHOOD PONDS

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- ❖ We have two (2) ponds – one in the front and one in the rear of the subdivision
  - ❖ We have removed weeds for shoreline
  - ❖ Reminder to pick up your trash !
- ❖ We have contract with Lake & Pond Biologist
  - ❖ Responsible for cleaning and treating the pond water
- ❖ We have stocks the ponds with fish in the Spring
  - ❖ Fish provided by Clear Creek Fisheries





# LANDSCAPING COMMITTEE: - RON BRADFORD

## LAWN MAINTENANCE & SNOW REMOVAL

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- ❖ We have a contract with U.S. Lawns
  - ❖ Cut the lawn in the Spring & Summer
  - ❖ Remove the snow in the Winter
- ❖ Cut and trim common areas and property around the ponds
- ❖ Remove snow from all major roads in the subdivision

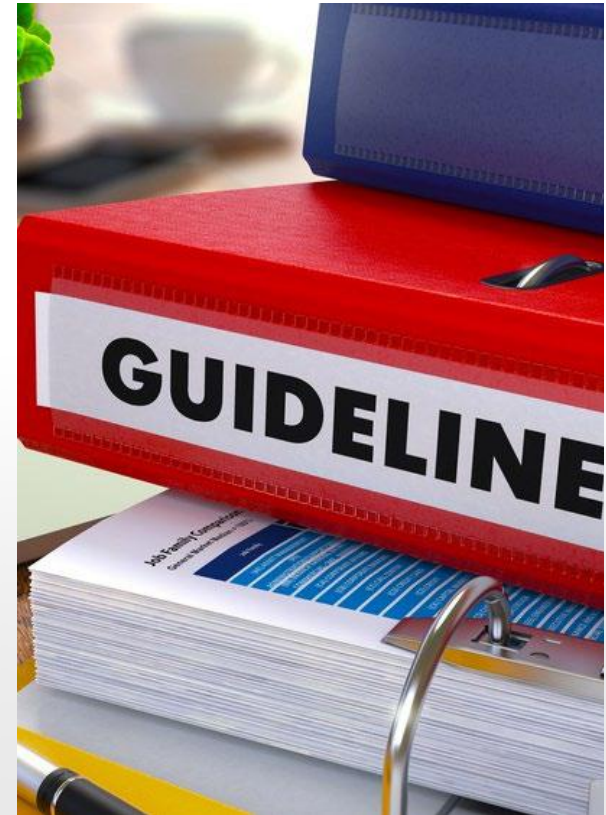


# BY-LAWS COMMITTEE: - JAY ORRELL

## HOA BY-LAWS AND COVENANTS

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- ❖ We are looking at the current By-Laws to recommend any potential changes
  - ❖ Currently working on a list of changes
  - ❖ Exploring combining “Hickory Ridge” and “The Retreat at Hickory Ridge”
- ❖ Once change list is complete will present to the Board of Directors
- ❖ All changes will be communicated to “Hickory Ridge” and “The Retreat at Hickory Ridge” homeowners



# ACC COMMITTEE:

- RICARDO SALAZAR & DEREK LORD

## APPROVE ARCHITECTURAL CHANGES

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- ❖ All architectural changes or improvements must be approved before you begin work - no exceptions !
  - ❖ Submit application to Property Management Company – Randy Truitt
  - ❖ Application will be forwarded to ACC Committee for approval
- ❖ All approved ACC applications are brought before the Board of Directors
- ❖ If you are uncertain about a planned change, please ask a Board Member !





Business Hours Number (765) 742-6390  
Emergency Number (765) 420-1630

Pay HOA Dues Online

Maintenance Requests

Closing Request



Home **HOA Communities** Property Management Corporate Services Blog About Contact

Main Street Management starts with a consultative approach to full-service as one of the area's most experienced and will quickly show you what we can do for you.

Property Management

116 TOWNS	GLEN HAVEN WEST	OVERBROOK FARMS	TANSEL CROSSING
ADDISON MEADOWS	<b>HICKORY RIDGE ESTATES</b>	PARKSIDE TOWNS AT SAXONY	THE BAKERY
AVALON BLUFF	HEMLOCK	PEBBLE BROOK VILLAS	THORPE CREEK
BRIDGEMILL	HUNTERS CREST	PIPER GLEN	TUSCANY VILLAGE
BRIGHTON ESTATES	INDIGO RUN	PRAIRIE AT LEGACY	UNION CROSSING
DERBY RIDGE	LIBERTY RIDGE	ROBERTSON VILLAGE	VILLAGES AT BROOKSIDE
DRAKE LANDING	LINCOLN POINTE	SHADOWOOD	VILLAS AT FRANKLIN CROSSING
ENCLAVE AT NORTHRIDGE	MANCHESTER ESTATES	SHEPHERD'S GROVE	VONTERRA



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## Hickory Ridge Subdivision Declarations

### Covenant Restriction Violations (CRV)

- You may report a CRV to Angela Remter your property manager via the website at [www.mainstreetmanagementllc.com](http://www.mainstreetmanagementllc.com) under the Hickory Ridge Estates link or via telephone at 765.742.6390 or text 765.635.1183.
- All CRVs submitted by a resident will be automatically added to our next inspection review for resolution.
- CRV reporting will not be disclosed to the offending resident.

### Download an Architectural Change Application

## Hickory Ridge Subdivision

- THE COVENANTS, CONDITIONS AND RESTRICTIONS OF HICKORY RIDGE SUBDIVISION
- BY-LAWS OF HICKORY RIDGE SUBDIVISION HOMEOWNERS ASSOCIATION, INC.
- ARCHITECTURAL CONTROL FORM – HICKORY RIDGE SUBDIVISION
- COVENANT RESTRICTION VIOLATION REPORT

## The Retreat at Hickory Ridge Subdivision

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Please make sure to include ALL the required documentation to avoid delays.



### ARCHITECTURAL CONTROL FORM

- ✓ Complete the attached ACC packet in its entirety.
- ✓ A copy of your Plot Plan/Survey (provided at the closing of your home or obtained from your local Records Office) with the proposed change(s) clearly marked on the plot plan. Include the dimensions of the improvement(s) to your lot (fence, deck, patio, etc.).
- ✓ Include a Picture and/or Brochure of the item or materials used to make the item. If the item is already installed, please take picture of completed project.
- ✓ For Fencing Improvements, include the bid from the professional installer who will be installing the fence.

***Please be sure to include this checklist and all necessary documents with application, as incomplete applications will not be processed. It is the goal of the Committee to approve all applications within 15 days of receiving a completed application.***

# SOCIAL COMMITTEE:

- AMY SHORTER

COORDINATE AND PLAN SOCIAL EVENTS

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- ❖ Set up refreshments at Annual Meetings
- ❖ Looking at potential neighborhood party next summer
- ❖ Looking to bring back the Neighborhood Welcome program
  - ❖ Personally welcome all new residents to Hickory Ridge
- ❖ Exploring ideas for holiday fun and neighbor interaction





# DECORATIONS COMMITTEE: - GARY BOARDMAN

COORDINATE SUBDIVISION DECORATIONS

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- ❖ We placed and removed decorations at or near the entrance to Hickory Ridge Subdivision and Round-A-Bout
  - ❖ US Flags for Memorial Day (May)
  - ❖ US Flags for Independence Day (July)
  - ❖ Christmas Lights at the subdivision entrance (December)
- ❖ Always looking for help to serve on this committee –
  - ❖ Suggestions on decorations for additional holidays





# Hickory Ridge Subdivision:



# MEETING TAKE-AWAYS:

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- We have a number of children in the neighborhood
  - SLOW DOWN when driving in Hickory Ridge !
- Put you trash & recycle cans away
  - Can not be visible from the street – Can not leave them in front of your garage
- Keep your yards in nice condition
  - Mow your yard and treat for weeds
- Maintain your fences
  - Repair or paint your fence to maintain a nice look
- Be kind to your neighbors !
  - Wave and speak when you are outside



# QUESTIONS ??

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