



## AGM SONOMA PINES HOMEOWNERS

Lions Hall in Westbank May 31  
Registration at 5 pm and meeting starts at 6 pm.

The agenda will include:

- + Proposed Budget
- + Rule Change Update
- + Election of New Board members

Come out and get an update on how your community is thriving and meet your neighbours.

### Can you help out at the AGM May 31?

We need a few volunteers to assist with homeowner registration and counting of votes at the AGM on May 31.

If you can help us out please contact Kim Reid at [reidkim@hotmail.com](mailto:reidkim@hotmail.com)

Great way to meet all your neighbours!  
Thanks very much

## Budgets, Fees, CRF's ... and other words I'm not sure about

Many people when they move into Sonoma Pines are hit with a number of new financial terminologies that they frankly don't fully understand. Don't feel bad: you are likely part of the majority of homeowners. In an effort to help you understand how the monthly HOA (home owner association) fees are determined, we first have to understand how the budget is created, reviewed, and finally the process for approval.

So let's begin – it all starts with a budget that is made up of four parts: (1) revenues, (2) operating expenses (3) contingency reserve fund (CRF) and (4) any surplus or deficit from the previous year.

Each of these parts may have sub-sections for common costs, multi-family costs and single-family costs.

(1) Common costs are those that apply to all 495 homes – for example: clubhouse expenses, street sweeping, landscaping, street lights, snow removal, garbage, irrigation etc.

(2) Multi-family costs include all those costs specifically related to the 341 multi-family homes – for example: roof repairs, gutter cleaning, windows, landscaping, irrigation, insurance, etc.

(3) Single-family costs include landscaping for the 154 single-family units.

**Fees = Operating costs + CRF – Revenues +/- surplus or deficit**

1. Operating expenses include all of the

contractual arrangements we have to run our community, e.g. landscaping, utilities, garbage and recycling, insurance, property management, plus numerous discretionary expenses like irrigation, clubhouse expenses, maintenance, administration, etc. Approximately 75% of our yearly budget is made up of contracts that we have negotiated with various vendors.

2. The Contingency Reserve Funds (CRF) are amounts we set aside each month that goes into a fund to help replace or repair common and multi-family assets within our community. A professional services firm develops a Depreciation Report every three years and as part of that report they develop a recommended CRF contribution for each year for both the common and multi-family yearly budgets. There is no CRF for single-family homes as they have full responsibility for the maintenance of their individual homes.

3. Revenues come from RV parking, newsletter advertising, clubhouse rentals and other miscellaneous items.

4. At the end of our fiscal year (March 31), we have either a surplus or deficit. If there is a surplus, the Board has the authority to decide whether to apply it against next year's budget or contribute the surplus into the CRF. If we have a deficit, then we

*cont'd on page 3*

## 2018/19 Proposed Budget

Please note that there will be a Budget Town Hall Meeting on Wednesday, May 9 at 7:00 pm at the clubhouse.

Summary materials will be sent to all owners once we have the year-end actuals.

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## Sonoma Pines Website and Sonoma Sun Newsletter

[www.sonomapines.info](http://www.sonomapines.info)

You can check here for most recent articles on the community, back issues of the newsletter, or copies of Council minutes and financial statements. Some pages are password protected so use sonomapines and you should be fine. If there is something that you would like to see on the site or in the Newsletter please email us at [sonomapinesnews@gmail.com](mailto:sonomapinesnews@gmail.com).



## SP NEIGHBOURHOOD BLOCK WATCH PROGRAM UPDATE

Reminder on Home Security

**The nice summer weather is approaching and we often forget to leave doors locked and garages closed:**

**Doors:**

- Do you keep your doors locked at all times even when you're home
- Have you re-keyed your locks since you moved in?
- Do your doors have a wide-angle peephole viewer?
- Are all exterior doors solid core hardwood or metal covered?
- Are entrance doors equipped with 1 good quality dead bolts?
- Do you have 6–8 security strike plates?
- Is the strike plate reinforced with 3 screws that pass through the door frame and into the wall stud?
- Is the glass in outside doors shatter resistant?
- Do all out-swing doors have a hinge with a locking pin or non-removable pins?
- Does your door fit snugly in your door jam (e.g. within 1/4 inch)?
- Do you have a patio door bar fastened into both the frame and the door to securely lock the door?
- Have you inserted screws into the top track of your patio door to prevent it from being lifted up and removed?
- Do you leave your patio door open at night for ventilation, securing it with a patio door bar?
- Do not open your door to anyone you don't know. Speak through the door

**Garage:**

- Are garage doors closed and locked when not in use?
- Does your automatic garage door opener use a rolling code system to prevent code grabbing?
- If the garage door is not equipped with an electronic opener, does it have heavy duty padlocks installed on both sides of the door?
- Is there a switch to shut off the automatic garage door?
- Is the door from the garage into the

house equipped with a deadbolt and do you always lock it?

- Can the garage lights be turned on from inside the house?
- Do you have window security bars installed on your garage windows?
- Do you have your garage door opener in a non-visible spot in your vehicle – or ideally not kept in your vehicle?
- Do you remove your keys from vehicles parked inside your garage even if the garage is locked?
- Do you remove all valuables from plain sight in your vehicle?
- Do you have window coverings on all garage windows?

Report suspicious persons or vehicles immediately to the police. CALL 911 IF A CRIME IS IN PROGRESS – FOR NON EMERGENCY 250-717-6147. Email your Sonoma Pines Blockwatch Captain and Co-Captain to share situations.

Get to know your neighbours. – Join BLOCK WATCH.

Karen Dickie – [karenjdickie@shaw.ca](mailto:karenjdickie@shaw.ca)

### Safety at Sonoma Pines: A Message from the Safety & Security Committee (SSC)

As residents of Sonoma Pines we all want to feel safe and secure in our homes and in our community.

**No Soliciting**

We live in a private residential community that doesn't allow soliciting and there are *No Soliciting* signs posted at both front and back gates. Residents can request uninvited solicitors (e.g. Telus, Shaw, etc.) to leave the property and are also free to contact the RCMP, if needed. If residents are able to obtain the vendor's name or ID or snap a photo this may be helpful.

**Manual Garage Door Panel**

For residents who have a Manual Garage Door Panel and are still using the original manufacturer's code, we would recommend that you change that original code. Recently, someone left the covers

up on a number of exterior garage door openers on Pine Vista.

**Parking Restrictions**

Please take a moment to read about the parking restrictions on pages 6-8 posted on our website at <http://www.sonomapines.info/rules-and-regulations/>. In order to avoid fines being issued or vehicles being towed, please let's ensure we all adhere to these parking rules.

Please feel free to direct any questions or comments to me.

Thank you,

Robert (Bob) Scruton, CTR

Chair of the SSC

[b\\_scruton@telus.net](mailto:b_scruton@telus.net) (250) 707-4677



## Oval Garden Report

**Why Xeriscape?**

Thoughts behind changing the Oval Garden to a Xeriscape Garden.

If you want your garden to give you the maximum enjoyment and value for your expenditure of time and money, xeriscaping is the answer! Xeri (rhymes with terra) is the Greek word for dry. Xeriscaping is gardening with the natural environmental conditions you live in rather than fighting against them.

**BENEFITS OF XERISCAPE**

- Enhances the value of your home with an attractive and water conserving landscape.
- Reduces water use- depending on the design and the plants used, water use can be reduced by over 50%.
- Saves time– less watering, trimming, weeding and mowing.
- Saves money– less water, chemicals, fertilizer, and replacement of dead plants.
- Eliminates pesticide/herbicide use– plants growing in their ideal conditions thrive.
- Protects your family's health and that of the environment – including keeping poisonous chemicals out of our water.



**PAUL HAWLEY** REALTOR®  
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RE/MAX Kelowna An independent member broker.

**I Live in Sonoma Pines.  
I Work in Sonoma Pines.  
I KNOW Sonoma Pines.**



## The Essential Five People On Your Strata Council

1. **President** The President's responsibilities include important procedural roles, as well as essential leadership functions. For instance, the President appoints committees as dictated by the bylaws, and operates as an authority on the rules and documents governing your Strata. During meetings, the President typically maintains order, proposes questions, calls votes, announces outcomes and recognizes those who are about to speak on the floor. The President also calls the meeting to order, announces the agenda and ensures that everyone adheres to it. As you can see, this takes a unique personality: one who is conversant in the dynamics of effective meetings, as well as knowledgeable about many of the specifics of your community.
2. **Vice President** The Vice President shares many of the responsibilities as the President, and serves in the leadership capacity when the President is absent. This individual is tasked with helping to maintain order during parliamentary procedures, keeping the flow of business moving efficiently, and acting as a knowledgeable source when it comes to the rules of the property. Like the President, the Vice President can also assist with committees.
3. **Secretary** You can think of this person as the Strata historian. The Secretary's role is to record all of the actions of the Council so they can be referenced later. This ensures clarity—imagine how often you've had a conversation with another party, only to find there were two different interpretations of the outcome after the fact. Now multiply that by every member of your Strata Corporation, and you understand how important good records are. The Secretary's functions eliminate those “Oh, I thought you meant...” scenarios by keeping accurate minutes during meetings and acting as the custodian of all records. The Secretary may also approve the minutes of all meetings and other important community documents.
4. **Treasurer** The effectiveness of your Council is dictated largely by your budget. This makes the Treasurer's role essential. He or she will be the keeper of financial records, ensuring they are both accurate and thorough. The Treasurer will apprise the Council of the Strata's financial health through regular reports of income and expenses, and will also produce an annual financial report to all Council Members. Look to the Treasurer to submit financial records in the case of an audit, and to authorize any disbursement of funds.
5. **Manager** As an outside party bound to your Strata Corporation by contract, it's important that your Strata Manager comes from a reputable property management company. This will ensure your Manager has the backing and experience to bring maximum effectiveness to the role. Though the specifics of his or her duties vary by contract, all Managers typically execute the policies dictated by the Council and administer all of the services, operations and programs of the Strata Corporation. Your Strata Manager should also be an important source of information and insight. In fact, many Strata Councils become more effective through training provided by an experienced Manager.

As with many Strata Councils, the individuals appointed to their roles will bring strengths and talents all their own. It's important to allow those strengths to come to the forefront—your Council will benefit from it. Yet understanding the basics of each role will help make sure the essential functions are covered as well.

### Strata Manager First!

The Strata Manager is the essential point of contact rather than the Board members as everything goes through the Strata Manager who then deals with the issue and elevates it to the Board level, if need be - the Strata Manager deals with the day-to-day issues and the Board with oversight.

## Budgets, Fees, CRF's ... cont'd from pg 1

need to factor that amount into next year's budget to pay back the amount owed.

### The Budget Process

Each of the various committees in Sonoma Pines (e.g. clubhouse, maintenance, landscaping, welcome, irrigation, communication, etc.) submit a plan in early February outlining the revenues and/or the operating expenses they feel they require for the next fiscal year.

The finance committee then consolidates those committee budget numbers for their review in March. The finance committee scrutinizes the numbers with the approach of “*need to have vs. nice to have*”. The finance committee also reviews the CRF fund balance and in conjunction with the Depreciation Report they recommend an amount to be approved for the overall operating budget. Once the finance committee endorses the budget, it is sent on to the Board for approval in early May. If the Board agrees with the budget, they in turn present the budget for ratification to the homeowners at the Annual General Meeting in May.

Once the homeowners approve the budget, then the fees are calculated as follows:

- Yearly common costs are divided by the 495 homes and then divided again by 12 months to arrive at a monthly common cost that every homeowner must pay.
- Yearly single-family costs (landscaping) are divided by 154 homes and then divided by 12 months to arrive at a monthly single-family component.
- Yearly multi-family costs are divided amongst the 341 homes using the cost allocation model and then divided by 12 to arrive at a monthly rate. The cost allocation model is based on the square footage of each individual multi-family home.

**Single Family Fees = Monthly Common Costs + Monthly Single Family Costs**  
**Multi-Family Costs = Monthly Common Costs + Monthly Multi-Family Costs**

Bryon Dickie [bryondickie@shaw.ca](mailto:bryondickie@shaw.ca)

## Sonoma Pines Calendar Of Events

Calendar click here: <http://www.sonomapines.info/calendar/>

### Planning a Successful Garage Sale

Happy Spring fellow Sonoma Pines residents!

As we begin to turn the corner from that extended winter and into the promise of another glorious Okanagan summer, people start to live outdoors again. With that notion in mind, the **6th annual Sonoma Pines Garage Sale** is coming up and this is an opportunity to provide some tips and tricks for garage sales and spring de-cluttering. The familiar adage is, "if you haven't used it for a year, get rid of it". Why pay to store it if you can make some spare cash? Start by going room by room throughout your house looking for items that you no longer want or use. As you collect items that you want to sell, place them in large garbage bags or boxes and store them in a seldom-used room in your house (or inside the garage). If you are able to group items by "category" or "theme", it will be much easier to price the items and set them out for display on the day of your yard sale. Once you've organized and priced your stuff (and remember- it's a SALE, price your items to SELL) it's time to get some gear together for the day:

- 1) Petty cash – I always start with \$50... five \$5s, toonies, loonies etc.
  - 2) Money organizer – You need either a cash box, fanny pack, coin bag, or purse to hold all of the money.
  - 3) Price stickers – I make my own price stickers using green painter's tape. It peels right off (I love green painters tape; I use it for many applications).
  - 4) Black Sharpie markers.
  - 5) Extension cord – so customers can try out electronics.
  - 6) Plastic grocery bags - for your customers new items.
  - 7) Scissors – you never know when you're going to need a pair of scissors!
- Happy selling!



### 6<sup>th</sup> Annual Sonoma Pines Garage Sale

Our 6th Annual Sonoma Pines Community Garage Sale is being held, Saturday May 26th from 8am - 2pm. Cost is \$5.00 which covers advertising and signage. To register, please contact either Lorna Wright [lorna-wright@shaw.ca](mailto:lorna-wright@shaw.ca) or, Jean Scheidl [scheidls@telus.net](mailto:scheidls@telus.net) 778-754-1884. We will even cook your lunch. Hot Dogs and Pop will be on sale at the clubhouse. All proceeds from the Hot Dog Sale go to improvements of the Clubhouse. If you would prefer you can rent a table at the clubhouse and sell your treasures from there. Cost to rent the table at the clubhouse will be \$10 inclusive of the advertising/signage fee. This event has proven very popular with customers coming from all over the valley. Deadline for registration is Saturday May 19<sup>th</sup>.



### June Issue Delayed

The June Issue of Sonoma Sun will be delayed.

We hate to miss our first of the month publication date, but in order to provide you with a summary of the AGM on May 31 the June newsletter will be publish a couple of days late.

Though instead of waiting to hear what happened at the meeting you could probably attend to vote on the budget and new Board.

AGM Meeting takes place Thursday May 31 at the Lions Hall in Westbank. Registration @ 5:00 pm. Meeting start 6:00 pm.

### Sonoma Pines Activities & Contacts

#### Quilting

Wendy MacLeod 250-899-1013  
[wendyjmac@gmail.com](mailto:wendyjmac@gmail.com)

#### Painting Club

Glen Heming 250-768-0991  
[glenheming@telus.net](mailto:glenheming@telus.net)

### Clubhouse Rentals

If you are interested in reserving the Sonoma Pines Clubhouse and require any information please call Jean Scheidl at 778-754-1884  
Rental Forms and Insurance Information are now on line at [www.sonomapines.info](http://www.sonomapines.info) under the Clubhouse tab.

### Letters



Please send your comments and letters to  
[sonomapinesnews@gmail.com](mailto:sonomapinesnews@gmail.com)

If you are interested in past copies of the Newsletter or more information on

The Sonoma Pines Community please check out the website at:  
[sonomapines.info](http://sonomapines.info)

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