

Phoenix Management Company Review Feedback for Tidewater Farm HOA

August 2016

Areas of Improvement:

- notify board of out of office dates when Michelle goes on vacation
- respond to emails within 3-5 business days
- receive financials more timely prior to board meetings
- occasional errors found in financial packet

Future Goals:

- create calendar of events for future planning
- archive annual review information
- Send board packets no less than 5 days before next board meeting date and poll for agenda items.

August 2017

Areas of Improvement:

- Annual meeting packet- Proxy & budget to be printed on single page
- Concern over too many accounts for Phoenix; informed board of change in staffing temporarily
- Coordinating LST & Watermatic and becoming more proactive
- No archive of prior review information available
- Include manager items on agenda

Future Goals:

- Send annual meeting reminder 1 week in advance of scheduled meeting date to improve attendance numbers
- Notify homeowners of Phoenix optional services
- More timely communications with new owners