

SOHA BOARD OF DIRECTOR POLICIES

Topic	Subject	Text of Policy	Date Board Approved
Animals	Raccoon trapping	Against the law. It is important that no one feed or encourage them to come to our homes.	2006-3-16
	Rats and Raccoons	If you have fruit trees please remove any fallen fruit that encourage a free meal. Under bird feeders need cleaning as well.	2006-9-21
Board	Board voting	A full report of the voting (for board candidates at the annual meeting) will be posted.	2006-2-15
	Liaisons	See 'Employee Liaison Policy' on page 5 of this document	2020-12-13
	Voting	Names of directors voting against motions should be noted in minutes. It may be asked that reasons for the 'No' vote be given.	2006-2-15
Committees	Reinstatement	Reinstatement Process Please see policy filed in Board Policy binder.	Revised: 2012-7-25 2011-5-25 2010-8-25
	Glen/Garden boundaries	Paper defining boundaries	2008-4-17
Fences	Guidelines	See 'Fence Guidelines Policy' on page 3 of this document.	2002-6-19 Revised: 2013-1-23 2015-2-25
Finances	Expenses over \$20	Expenses over \$20 should be paid by the treasurer by check rather than from the petty cash fund.	1996-8-7
	Bidding process	The Association shall obtain three bids for all work or acquisitions over \$2,500. Contracts will not necessarily be awarded to the lowest bidder – contracts will be awarded to the best bidder as determined by the Board. The requirement for three bids may be waived depending on the circumstances, i.e. whether the work is an emergency, the Association has a long-standing relationship with a particular vendor who is especially knowledgeable about the park, changing vendors would disrupt existing warranties and/or other vendors are not willing to bid on the project.	2020-5-27
Park Maintenance	Glen water signs	The Park will be responsible for checking and replacing [do not drink] signs on each property.	1999-6-21

	Retaining walls, responsibility of Park	It is the responsibility of the Park that any retaining wall over one foot be the responsibility of the Park unless the resident has decided to build it in which case it becomes the responsibility of the owner ever after.	2006-12-14
	Drainage to glen	All homes on the glen are required to make sure water drainage extends down the slope, past the path into vegetation.	2017-3-22
Trees	Tree Care Policy	See 'Tree Care Policy' detail on page 4 of this document and reference R&R 18C.	2009-8-20 2012-9-26

SORRENTO OAKS HOMEOWNERS ASSOCIATION, INC.
GUIDELINES FOR FENCES
Revised January 23, 2013. Effective March 1, 2013.
Revised February 26, 2015

In general, Sorrento Oaks has a style or history of having little fencing. Openness and greenery are encouraged rather than enclosure.

No fences may be erected in the Park without prior written approval from the Board. No power auger can be used to dig holes. (Rule 19)

A fence must be:

- 1) set back at least two (2) feet from the street;
- 2) no more than forty-two (42) inches high, including lattice, running for the first eighteen (18) feet from the street, including the two foot setback;
- 3) no more than six (6) feet high, including lattice, running from 18 feet from the street to the back of the space;
- 4) a good neighbor fence (attractive from both sides);
- 5) no gates are to be installed that would block a 3-foot access around any home (SOHA Board of Directors Meeting, July 13, 2014)
- 6) No fence may be installed between a rear lot line and the glen (SOHA Board of Directors Meeting, April 23, 2014)

FOLLOWING ARE DEFINITIONS AND EXCERPTS FROM CCR TITLE 25 Division 1 Chapter 2 Articles 1 and 9, April 1, 2013

Article 1 Section 1002: Definitions

- (a) (1) Accessory building or structure. Any...FENCE...established for the use of the occupant of a unit.
- (f) (2) FENCE. A freestanding vertical structure erected to enclose an area or act as a barrier generally constructed of posts, boards, wood, wire stakes or rails. (Inspector OK'd aluminum)

Article 9 Section 1428: Location

- (e) FENCING of any material, that meets the requirements of section 1514 of this article, maybe installed up to a lot line.

Article 9 Section 1514: FENCE Height and Location.

- (a) A FENCE located on a lot shall not exceed six (6) feet in height.
- (b) A FENCE exceeding forty-two (42) inches in height, parallel to a unit or habitable accessory building or structure or building component, shall not be located closer than three (3) feet to that unit, habitable accessory building or structure, or building component.

FOLLOWING ARE EXCERPTS FROM SORRENTO OAKS RULES AND REGULATIONS

19. No fences may be erected in the park without prior written approval from the Board. No power auger can be used to dig holes.
18. A. Any landscaping that would require excavation or digging greater than twelve (12) inches, including irrigation canals, must have the prior written approval of the Board to avoid damage to underground cables and pipes. (Revised 2/13)

PROCEDURE:

- 1) Discuss your potential plan with neighbor(s) and request feedback.
- 2) Fill out a SOHA Board Homeowner Proposal Response Form available outside the office and return it to the office. The Architectural Committee will review the request at its next meeting (first Monday of the month, 5pm) and advise the board which will vote on it at its next meeting (fourth Wednesday of the month).

Sorrento Oaks Homeowners Association, Inc. (SOHA)
TREE CARE POLICY

Approved for addition to this policy by SOHA Board of Directors, September 26, 2012

“Trees that are more than 20” in circumference or more than 12 feet in height, but are not yet defined as significant according to the County definition, may be pruned without board approval.

They may only be removed after discussion with neighbor(s) and with written approval of the board. Neighbors should be informed of tree removal or pruning in advance to protect car(s) and plant(s).”

Approved by SOHA Board of Directors, August 20, 2009

Reference SOHA Rules & Regulations, Section 18 C, Landscaping/Alterations

A. DEFINITION of Significant Tree

The Association acknowledges the Santa Cruz County Planning Department’s definition of a significant tree:

-) “Within the Urban Services Line (Sorrento Oaks), any tree which is equal to or greater than 20 inches. d.b.h. (approx. 5 ft. in circumference - 60 inches)
-) d.b.h. (diameter breast height) The average diameter of a tree outside the bark at a point 4.5 feet above the highest level ground.”
-) A permit from the County is required for removal of a significant tree or pruning of more than one-third of the green foliage.
-) (Santa Cruz County Code, Chapter 16.34 (Last revised 12/13/97)

B. LAWS AND RULES

1. “With respect to trees in the common areas of a mobile home park, park management shall be solely responsible for the trimming, pruning, or removal of any tree, and the costs thereof.” (2009 California Mobile Home Residency Law, 798.37.5 (a).
2. “No homeowner may plant a tree within the mobile home park without first obtaining written permission from the management.” (2009 California Mobile Home Residency Law, 798.37.5 (d)
3. “All trees or shrubs planted on residents’ home sites are the responsibility of the residents. They must be maintained in a safe, attractive manner to insure they do not pose a hazard or nuisance to the Park or neighbors, and will not endanger the park, the common grounds, or neighbor’s property. Residents must obtain the Board’s written approval of the type of tree to be planted on the home site.”

C. SORRENTO OAKS POLICY

1. The Association accepts financial responsibility for the maintenance of any significant tree on the common area of the Park, as defined above, in order to keep it in a safe and healthy condition
2. If a significant tree, as defined above (A), requires pruning or maintenance and is either on a home site or on common area, the work may proceed if a certified arborist is consulted and provides or supervises the work, and if the work is approved by the Board in advance.
 - (a) If the work is required for the health of the tree on common area or if the tree is a nuisance or hazard, the work will be paid for by the Association.
 - (b) If the work is optional, the requester will be required to pay for the work.
 - (c) If the tree is on a space, the owner of that house will have financial responsibility for the tree whether the work is required or optional.
3. If a tree on a space becomes a significant tree over time, it falls under the same rules as other significant trees.

SOHA Board of Directors Employee Liaison Policy

Board Employee Liaison Appointments Considerations:

1. Liaisons are appointed by the Board to supervise and facilitate the evaluation of our employees.
2. Liaisons can be directors or members dependent on experience and/or qualifications related to the Office Manager/Bookkeeper and Maintenance Provider jobs.
3. Potentially, our employees could have a different supervisor/liaison every year so appointing liaisons should be a thorough and thoughtful board action.
4. The board recognizes the need to consistently support the role of employee liaisons and, therefore, our employees.

SOHA Policies

Liaison appointments:

1. The "new" Board appoints liaisons at the February board meeting.
2. Appointments last one year until the next round of appointments the following February.
3. If additional time is needed, the Board may ask the current liaison to continue or choose a substitute liaison until the official appointment is made.

Liaisons responsibilities:

1. Use the employee job description and contract to determine, and maintain, the scope of duties and expectations.
2. Supervise daily assignments, oversee work schedules, provide assistance when needed, and trouble shoot issues.
3. Verify accuracy of bi-weekly time cards and sign as required.
4. In accordance with Board timelines and actions, prepare and facilitate employee performance reviews. Recommend possible changes in salary, work schedules, and PTO increments or other actions to the Board.
5. Protect employee working hours by requiring members, directors and committees to contact the liaison before talking with the employee about performing any tasks.
6. Provide a consistent, supportive, respectful work environment.
7. Meet with previous liaisons to receive essential information and brief newly appointed liaisons with essential information.
8. Provide the board with possible names to be considered for the next year's position. Help with the search or offer to do it again.

General qualifications for all Board-appointed liaisons:

1. Awareness and acknowledgement of the following California HOA's governing documents: Davis-Stirling, Title 25, and civil codes.
2. Knowledge of the following internal governing documents: as R&R's, By-Laws, Policies, Occupancy Agreement
3. The ability to research all HOA government documents to identify and solve potential issues.

Maintenance Liaison general qualifications:

1. Basic knowledge of general and standard repair and maintenance practices, and pruning & other landscape maintenance practices
2. Ability to locate and consult experts on maintenance task requirements and solutions as necessary

Office Manager Liaison general qualifications:

1. Basic knowledge of office skills, practices, and necessary job-related equipment.
2. Knowledge of: R&R's, complaint process, Pet Agreement, Occupancy Agreement.
3. Listening and problem-solving skills (Support and assist with the complaint procedures.)

Office Manager/Bookkeeper Liaison (usually the Board Treasurer) general qualifications:

1. Basic knowledge of office skills, financial processes/practices, and necessary job-related equipment.
2. Basic knowledge of Financial Committee's procedures.
3. Collaborative skills (with Treasurer, and possibly others)
4. Be familiar with deposit procedures
5. Participation in Finance Committee to help with the flow of information from FC to Bookkeeper