

# PEBBLE BEACH VILLAS

## PROCEDURE #3

### COMMUNICATIONS METHODS

#### **A. PURPOSE:**

Effective communication is essential to achieving a congenial and efficient condominium lifestyle. Some communications are simple and straight forward, others require more attention and effort, and some are of substantial significance requiring extensive effort. As a full reference guide, this document lays out procedures, processes, and key information to help PBV Unit owners in communicating with the Association Board of Directors and the Property Manager Elliott Merrill (EM) to address any and all matters requiring attention.

Each Communication should be specific and meticulous enough to identify the subject/issue and the request. If additional time is required, an estimated completion date should be provided.

- Three “principal” players are involved in most PBV communications:
  - Unit owners (and occupants);
  - Condominium Association’s Board of Directors (BOD), both individually and collectively;
  - Our Property Management Company, Elliott Merrill (EM), functions as a designated agent for the Board of Directors who manages Pebble Beach Villas property and finances and plays the central role in most communications.

#### **B. GETTING INFORMATION TO OWNERS:**

Owners are urged to use the many existing resources to find information already available and thus eliminate the need for Board or Property Management inquiry..

- PBV Website (<http://www.pbvillas.org/>) itemizes the following:
  - PBV Board of Directors
  - Financial Reports- monthly
  - PBV Board of Directors Meeting Minutes
  - Forms
  - PBV control documents
  - PBV Rules and Regulations
  - Fiscal Year Budget
  - Notifications regarding events, services
  - PBV Policies and Procedures
  - PBV Memories

#### 2. Building Bulletin Boards:

- On stairwell at each end of every building (except H building)
  - Postings include [notices and](#) board meeting agendas, annual meeting agendas, service outages and other notices.
3. Clubhouse and H building Bulletin Boards:
    - Inside Board: Renters information posted. Beach Gate Security Code.
    - Outside Board: Right Side is reserved for Board postings. Left Side is for community postings, including rental and For Sale postings. Middle section is for current events.
  4. PBV Board Meetings: Held several times per year with due notice to all owners. All owners, renters, and guests are welcome to attend. Owners are permitted, during designated times, to participate at the meetings.
  5. PBV Annual Owners Meeting: Held each January, with comprehensive review of the previous year's project results and plans for the upcoming year. Owners are permitted and encouraged to raise questions and concerns at these meetings.
  6. PBV Committees approved by the Board are required to have open committee meetings, unless otherwise required, and produce a written report to the Board with findings, conclusion and recommendations.

**C. COMMUNICATING WITH THE PROPERTY MANAGER E.M.:** Resolving owners' questions, concerns and maintenance requests.

1. Communication to and from the Property Manager/EM is the primary source for posing and answering question and addressing concerns. Communicating with EM should be an owner's first step in raising questions or concerns.
2. Our Property Manager representative is currently Mike Gallagher [mikeg@elliottmerrill.com](mailto:mikeg@elliottmerrill.com) and his assistant is Paolo Alvarado [paolaa@elliottmerrill.com](mailto:paolaa@elliottmerrill.com). Emails and phone calls are welcomed. They can be also be contacted by phone at Elliott Merrill's office: (772) 569-9853.
3. The Property Manager will respond to all communications and shall engage the Board of Directors, as necessary, to address and resolve questions or issues and/or consider recommendations from owners. These communications may be by phone, email, or U.S. Mail.
4. Unless owners have requested email notification by completing the PBV Authorization form, all official notices and notifications from Elliot Merrill including Budgets, Annual Meetings, Election of Directors, etc. are sent to owners by US POSTAL MAIL. Please note that EM is required to mail items to the official address provided by owners to EM.
5. Examples of unit owner communications:
  - Suggestions/Recommendations
  - Common Area maintenance needs (maintenance request forms are available in the clubhouse for deposit in the EM request box).
  - Non-emergency security matters
  - Information Requests
  - Web Site feedback

- Lease Forms
- Rental Forms
- Sales Forms
- Rules Violations Notification
- Complaints
- Guests Forms
- Request for Addition to Board of Directors Agenda Items
- Notification to Board for change of Unit access Keys (required by By-Laws).
- Request for Reservation of Clubhouse for personal event.

**D. EMERGENCY COMMUNICATIONS AND SITUATIONS:** EMERGENCY AND IMMINENT SECURITY MATTERS REQUIRING IMMEDIATE ATTENTION SHOULD NOT FOLLOW THE STANDARD PROCEDURES DEFINED HEREIN. INSTEAD, CALL 911, POLICE, FIRE DEPARTMENT OR AMBULANCE FOR IMMEDIATE RESPONSE AND ATTENTION. SEEK HELP/SUPPORT FROM NEIGHBORS AS NECESSARY. WHEN ABLE, CONTACT A BOARD MEMBER.

WHEN IT IS NECESSARY TO ACCESS A UNIT IN CASE OF A DANGEROUS SITUATION OR WHEN DAMAGE IS OCCURRING, UNIT OWNERS MUST ALLOW ENTRY BY AN AUTHORIZED PBV REPRESENTATIVE. WHEN POSSIBLE, NOTICE OF REQUIRED ENTRY WILL BE PROVIDED TO A UNIT OWNER WITH AT LEAST 24-HOURS ADVANCE NOTICE.

**E. PBV BOARD/ELLIOTT MERRILL COMMUNICATION TO/FROM UNIT OWNERS:**

1. Notices of meetings Annual meeting, board meeting, budget meeting, special meeting posted
2. PBV Notifications: storm notices, service disruptions due to vendor work, or special circumstances such as the Covid19 circumstances.
3. Web Site Postings: on a regular and timely basis
4. Annual Audited Financial Report sent to all owners
5. BOD Board Meeting Minutes
6. Board approved Annual Operating Budget and Reserves Budget
7. Notice of Annual Dues assessment
8. Notice of any Special Assessments
9. Board approval of Lease Form
10. Board approval of Rental Form
11. Board approval of Sale of Unit application
12. Issuance of documents, including Directory, Rules and Regulations
13. Parking Passes
14. PBV Published Standards
15. PBV Published Procedures
16. Issuance of amendments to control documents
17. Issuance of updated Annual Owner's Directory.
18. Other, as determined.

**F. INTERACTIVE ACTION BETWEEN UNIT OWNERS AND THE PBV  
BOARD/ELLIOTT MERRILL:**

1. Notices to Owners of Violations
2. Notices of approval or non-approval for lease, rental, or sale
3. Notice of Violation hearing
4. Notice of Fine Assessment
5. Notice of suspension of privileges
6. Notice for need to access unit
7. Notice for Unit inspection
8. Request for update on contact information
9. Notification: as a result of an emergency
10. Notification of assessments in arrears
11. Notice of BOD Receipt of complaint against Unit Owner
12. Notice of Damage to a neighbor's Unit caused by notified Owner
13. Request for mortgagee contact information
14. Request for updated voting certificates.
15. Request for Email Notification authorization.

ALL COMMUNICATIONS BETWEEN UNIT OWNERS, THE PROPERTY MANAGER AND THE BOARD OF DIRECTORS SHOULD BE SPECIFIC IN IDENTIFYING THE ISSUE AND SPECIFY WITH PARTICULARITY AS WHAT IS REQUESTED AND EXPECTED. IF ADDITIONAL TIME IS REQUIRED AN ESTIMATED COMPLETION DATE SHOULD BE PROVIDED.

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