



# SURFSIDE III NEWSLETTER



January 2007

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## Report From the Board of Directors

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### Results Of Vote Count Done at the December 16<sup>th</sup>, 2007 Session Of The Annual Meeting

Your vote really counted! We needed 155 valid ballots and we had 157. Of those that were elected, Bill Betts received 154 votes, Wayne Matayoshi received 152 votes, Ira Green received 151 votes, Karl Twyman received 108 votes, and Linda Kaplan received 102 votes. The owner not elected, Joe Dehorty, received 100 votes. Because Wayne and Linda were absent the organizational session was postponed. Officers will be chosen at the next open meeting on Wednesday, January 3, 2007. (The meetings scheduled for December 20 and 27 have been cancelled.)

### 2007 Budget

The Board adopted the 2007 budget at the November 29 meeting. There will be no increase in the monthly dues. The 2007 budget restores previously cut programs and includes funds for the following operational items:

- Repair or replace drainage lines in the playground area east of the clubhouse.
- Funds to replace dead landscaping.
- Funds to start development of a landscaping plan.
- Tree trimming.
- Expanded contract security services.
- Improvements to the camera system.
- Replacement of BBQ grills and park benches.
- Funds to add or replace clubhouse furniture or equipment.
- Funds to start digitizing association records.

The following capital items will be started or completed:

- The flat portions of the clubhouse roof will be replaced
- Painting cycle will begin
- Portions of common area electrical lighting will be replaced
- Termite extermination
- Building weatherproofing

### State Farm Presentation

At the Open Board Meeting on January 10, 2007 at 7 p.m. in the Surfside III Clubhouse, Shirley Brandon, from State Farm Insurance, will be in attendance as a Guest Speaker for questions relating to insurance concerns or needs homeowners may have. This should prove to be very informative for all homeowners.

### Special Assessment Update

Stonemark Construction Management has been retained to manage the special assessment repair project. They will give a presentation at the January 10<sup>th</sup> open meeting in the clubhouse.

One townhouse unit is being used as a prototype. Mold problems in that unit are caused by building envelope problems (roofing, siding, stucco). Scope of work and specifications have been drafted and contractor bids are in process to do testing and restoration repairs on this unit.

Several condos have been selected and will be used as prototypes. Scope of work documents are in process.

More than 82% of the pipe issues are drainpipe backups or breaks. Most of the damage in the units has been caused by sewer backups, since they sometimes go undetected for some time.

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# Committee Briefs

For more committee information visit <http://www.surfsideiii.com/docs/committee/committee.htm>

Please contact the committee chair to volunteer

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**Budget Committee** Chair: Wayne Matayoshi, [wayne.j.matayoshi@boeing.com](mailto:wayne.j.matayoshi@boeing.com) and [wjm3206@verizon.net](mailto:wjm3206@verizon.net)

A budget committee meeting was conducted on 12/9/06 from 10-12 in the clubhouse to discuss November operational budget expenditures and issues, 2007 operating budget/reserve, and special assessment accounting. The following members/persons were present: Wayne Matayoshi (Chairperson), Ira Rubinson, Marvelle Ross, and Linda Flores (Lordon Management).

**Operational Budget Expenditures and Issues:** A review of October financial data was compiled by Ira Rubinson. Key concerns are that the plumbing and unit repair costs continue to create a monthly overrun of the operational budget. It is expected to end 2006 with a significant budget deficit. November financial data was not available yet, but will be provided by Lordon on December 16<sup>th</sup>.

Monthly maintenance logs were provided by Lordon to the Budget Committee to audit repair cycle time, contractor bids, and actual billing costs (labor and materials). The intent is to ensure that there are consistent and fair processes for contracting services in a timely manner. Lordon will add the P.O. # to each task/job for future monthly logs to facilitate auditing. Marvelle Ross and Kellie Egan will review these for discrepancies/issues.

Lordon will schedule Shirley Brandon of State Farm to attend our next open Board meeting in January (1/10/07 from 7:00 pm -8:00 pm) to review the current policies. Homeowners are invited for a follow-up question and answer session after her presentation to address coverage issues and concerns.

Additional discussion identified two topics for Board consideration:

- 1) The possibility of gaining additional revenue to support association repaving costs. An additional monthly charge for units possessing more than two vehicles (\$25/additional vehicle) could provide adequate costs to sustain common area paving repairs. Monthly charges would only apply to on-site vehicles (tenant/on-site owner). This idea will be passed to the Board for further review. Homeowners would be required to register all vehicles for this rule to be enforceable.
- 2) Having a full time on-site building grounds manager live on the grounds in a unit paid/subsidized by the HOA. Homeowners could place their rental bids to Lordon for selection. This housing would be considered as part of the compensation package and could reduce the requirements for additional on-site staff (clubhouse attendants, office assistant).

**Special Assessment:** Stonemark was provided a check (approximately \$11K) to start the project management for the plumbing effort. The elevator replacement contract is still under negotiation with the Board to determine the project cost.

If any owner has any issues about unit maintenance charges (since April 2006), they should contact Kellie Egan at [surfside3\\_budget1@yahoo.com](mailto:surfside3_budget1@yahoo.com). Emails should include date of reporting to Lordon, date of work performed and specific facts of the service performed/not performed. Kellie and Marvelle will try to review these services based on cost and timeframe in order to determine whether a recommendation should be made to the Board for further review.

Next committee meeting will be on Saturday 1/13/07 from 10-12 in the clubhouse.

**Neighborhood Watch Committee** (Anonymous for safety reasons) [neighborhoodwatch@surfsideiii.com](mailto:neighborhoodwatch@surfsideiii.com)

We had a great turnout for our December 7th meeting, with about 14 people in attendance. We had two officers from Wilshire Protection Division attend for a question and answer session. The meeting was very informative for us and them. We discussed the layout of Surfside III and the areas of concern for us as residents. Our next meeting will be Thursday, January, 4, 2007 at 7:00 pm in the Clubhouse. It will be a walk night so please bring your flashlights.

## **Special message about collection procedures**

A number of owners have been asking what happens when a unit does not pay its dues or special assessment. Linda Flores of Lordon Management has provided the following summary:

Lordon Management sends out an initial delinquency letter to the homeowner once the account is 30 days past due.

When the account is 60 days past due the first 30 day demand letter is then sent. At this time, a delinquency report is provided to the Board of Directors for review, with the recommendation to file Liens. The Board of Directors then votes to approve the activation of the Lien Process, which begins if the first demand letter is ignored. At this time the account is 90 days past due. The Attorney then sends another Demand Letter to the Homeowner, files a lien, and begins preparation of the Foreclosure Process. Once the Delinquent Account has reached \$1,800.00 in arrears or 12 months consecutively without a payment the Board of Directors votes on Foreclosure Proceedings to be filed.

## OWNERS' CORNER

From the editor

As you can see from both last month's and this month's "Owners' Corner" entries, we seem to have a healthy controversy going on as to what belongs in this section of the newsletter. I would like to offer some thoughts and guidelines. The idea of it is to provide an open forum for all owners to express their opinions. Does this include political statements regarding candidates for Board? Well, during the month before our most important event of the year, the Annual Meeting and Board election, yes, I think it is to be expected. Many owners have opinions on this important topic, and this seems like a great place to share them. At the same time, however, I think personal smear campaigns are out of bounds. In other words, statements *in favor* of a candidate are fine, while perhaps statements *against* a candidate are generally not.

Of the submissions for the December issue, I felt one was close to the boundary, but acceptable -- a judgment call which I made, and which I stand behind. The others were all fine. Unfortunately, I cannot say the same about some of what was said at the December 2 meeting. I'm sure many of us would like to be able to "edit" what some people say out loud, but then we remember what country we live in, and put up with it.

All in all, I think "Owners' Corner" is a great idea, and an exciting addition to the Newsletter. The idea came from individual owners with opinions they wanted to express. I will continue to monitor your submissions on issues of taste and appropriateness, but beyond that I will include everything you send me, unedited. As usual, please e-mail your material whenever you have something. The 10th of the month is generally the cutoff date for the following month's edition.

yours, Dan Kessner, dkessner@csun.edu

\*\*\*\*\* on an important topic \*\*\*\*\*

I live in Surfside III and completely support the towers project. This is the best thing ever that can happen to our City. Please support the project. It will make our City come alive. The opponents of the project are misinformed and not knowledgeable!

Paul Lewow CPA, 643 Bluewater Way, Resident

\*\*\*\*\* and in response \*\*\*\*\*

As fellow residents of Surfside III, we were dismayed to read our neighbor Mr. Lewow's brief letter in support of the proposed "towers" project. Far from being "misinformed and not knowledgeable," we are highly educated community members (two master's degrees between us), ardent environmentalists, local public school teachers, and pragmatists about the challenges facing our community.

We understand that Port Hueneme is suffering from a housing shortage, that our town does not have a great deal of available land, and that building up is smarter and more environmentally friendly than sprawling out. We support SOAR and understand that projects which focus on vertical growth will help us limit the pressure to gobble up farm land for housing. However, we also firmly believe that a project on the SCALE of the proposed one has no place in our community, or anywhere along our beautiful coast. A ten story building is one thing, but a forty-six story building is ridiculous. Not only would this building stick up like a giant ugly thumb, but the increased population and its attendant trash, vehicle traffic, and pollution would ruin our beach environment.

Most upsetting of all, the towers would only have a token effect on what our community really lacks, which is AFFORDABLE housing. As two public school teachers, we were barely able to afford an older condominium across the street from the proposed project. We do not need more high-end vacation housing in our community; we need more housing for those of us who keep the community running on a daily basis - teachers, firefighters, nurses, and the like. We know the arguments that the developers will use to try to sway us - they'll tell us how great this project will be because of the increased tax dollars, how it will increase our local property values. We could sit back and start planning what to do with our increased equity (we could use the money!), but isn't it time that we all stop worrying about our own personal

bottom lines, and start worrying about the best interests of our whole community?

Mr. Lewow says that he wants our city to "come alive," and we're curious what that means to him. To us, a living city is one where you are happy to live, one where you plan to stay and raise a family, one where all residents feel a sense of community and pride. We don't think that an LA-sized condominium tower creates that effect. The scale and focus of the proposed tower are offensive to our community and its needs. We hope that Mr. Lewow, the developers, and our city government realize that those of us who oppose the towers do not oppose smart growth - we oppose this irresponsible project. This is not an opinion that we just pulled out of the air, but an educated and informed one.

Thank you, Ingrid Gaines & Jeremiah Brennan, Port Hueneme, CA

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The November newsletter asked if anyone were in a position to assist with the revision of the CC&R's, etc. and I called Ira to volunteer. He gave me the name of the person spearheading the revision, so I called her. She refused my help, said she was "finished with it; was not interested in doing another thing for the association". Lesson: be appreciative of offers to help, even if you are fed up and bowing out. The offer may not come again, and we all need all the help we can get here at SS3! -- Anonymous.

Dear Anonymous:

Please call me again. We really need someone to work with the CC&R's and the By-laws.

Thanks Ira

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I was sorry more people did not attend the annual meeting. On the other hand, those who did not come were spared the disgusting juvenile negative attack organized by a small closely knit group who wasted our time with ^^^, barbs, and innuendos thinly disguised as "questions for those running for the board". The only good thing about their protracted rant was it allowed the more intelligent and down to business portion of our group to see clearly how immature and silly this group is and made us more determined than ever to turn our backs on their last year-long escapades and move forward in supporting and positive ways to improve our physical, intellectual and emotional community. The really wise ones at Surfside III do not rely on back-stabbing gossipers and people who stoop so low as to smear the cars of those with whom they disagree with dog shit. The truly bright and interested residents would read the minutes of meetings, ask the principals involved for documented proof and explanations and delete e-mails that do nothing but denigrate those who have given so much time and energy for the good of all of us. I wish to extend much gratitude to each and every one of you who have given what you could to make my home and my life better. Bless you!

Sami Lee

^^^Deleted word with permission of the author.

\*\*\*\*\* from Ira Green \*\*\*\*\*

During the Special Board of Directors meeting on Saturday, December 2, 2006 (while we were waiting to see if there was a quorum for the members annual meeting), an owner, during the Question and Answer period, told me that I never responded to a letter sent to me last year on December 2, 2005. This of course raises the issue of a board members time to respond to US mail sent to their home. I do not give out my home address. I spend about 20 to 30 hours a week responding to e-mails. I have done this to help out while the Board and Management implement a satisfactory response network with the Surfside III community. However, I can not add response to US mail to "my plate." Since that last Saturday, another homeowner mailed a letter to me, but with Dan Kessner's address. Dan forwarded it to me. In both cases, I had to input the letters so that they could be handled. I am no longer going to take the time to input correspondence sent to me.

If you don't have computer access, please ask one of your neighbors for help. If you must use US mail, please mail your correspondence to Linda Flores. If you do get an address for me and I receive you mail, it will wait until I see Linda Flores in person to give it to her for response. That means you could experience up to a six week delay.

I have also received anonymous e-mails. We are not going to respond to anonymous e-mails as a matter of policy. In addition residents that do not want to identify themselves will be removed from my e-mail distribution list after given a chance to identify themselves.

The second letter that I referred to above was a submission for Owners Corner and I inputted it so that it could be printed in this section. The first letter was from Veronica Sanchez. The excerpt that she asked that we reply to is copied below

exactly as she had typed it. Linda Flores' reply follows that.

\*\*\*\*\* Excerpt from Veronica Sanchez's letter to Ira Green dated December 2, 2005 \*\*\*\*\*

"If problems are addressed as they are reported and someone was in charge of returning phone calls and following up on repairs in a timely matter.....there would be less COMPLAINTS of NEGLECT.....instead of CHAOS...in management.

I propose a STANDARD PROTOCOL with (1 DAY) phone response. And (1 Day) inspection of problem with an appointment to resolve the damage. EMERGENCY REPAIRS have PRIORITY.....everyone have a list sent out with list of protocols. And what is consider an EMERGENCY!.....THIS IS NOT IMPOSSIBLE! ITS being organized and cutting on unnecessary repair cost due to NEGLECT.....Also (1 DAY) a week someone from management service be available for on site problems resolved at OLD OFFICE.....with extended hours 8 am to 5 pm are not sufficient nor accommodating to working people in the real world not SPECTRUM'S....."

\*\*\*\*\* Response from Linda Flores \*\*\*\*\*

Dear Ms. Sanchez,

Mr. Ira Green is in receipt of your letter dated December 2005. He has no recollection of receiving such letter and has forwarded your correspondence to Lordon Management for a response.

As you may be aware, there have been many concerns and issues that have required immediate attention at Surfside III over the past months. Also, as a reminder, the Board of Directors volunteers their time to the Association and is voted on by the Members of the Association. Having said that, it is the responsibility of the Property Management Company to address many of the concerns of the community via directive and approval of the Board of Directors.

A protocol has been established by the Board of Directors for Lordon Management in regards to response time to homeowners concerns. As presented in the recent past open Board of Directors Meetings, many of the urgent concerns have been addressed by Lordon Management in a timely manner. There is a team in place that is consistently available to the homeowners including an After Hour Emergency Service available to the homeowners in which an employee of Lordon Management will respond in a timely manner once the emergency has been reported.

Calls that are placed to Lordon Management are answered within 24 hours. Jennifer Critchfield has done an incredible job in providing A-1 Service to the homeowners and routing their concerns to the necessary department. Surfside III has done an outstanding job in directing the homeowners to Jennifer Critchfield via Newsletters and the Surfside III Website. The homeowners of Surfside III are very fortunate to have such a Proactive Board of Directors who donates MANY HOURS in satisfying the needs of their community.

Keeping this in mind and the fact that this letter was dated December 2005, it is the hopes of Surfside III Board of Directors and Lordon Management that you are finding the response time for concerns throughout the community are being addressed in a timelier manner than in the past.

There are still many concerns throughout the community that are being addressed on a daily basis. Surfside III did not find itself in the situation it's dealing with overnight and it will not be resolved overnight, but through tenacity, focus and consistency, it will one day again soon become the community each homeowner desires it to be.... A BEAUTIFUL BEACHFRONT COMMUNITY.

Thank you for your input, Linda Flores, Community Association Manager, Surfside III COA

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## Contact Information

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### **MAINTENANCE/RESIDENT SUPPORT (PHONE NUMBERS AND E-MAILS BELOW):**

**Contact Jennifer Critchfield; for e-mails always copy Donalea Bauer**

**Include your phone number(s) and/or e-mail for response before end of next business day.**

**If more urgent, call Donalea Bauer.**

Jennifer M. Critchfield, the assistant community manager can be reached by e-mail at [jennifercritchfield@lordonmanagement.com](mailto:jennifercritchfield@lordonmanagement.com) or by telephone at 800-729-5673 x 3380. If you leave a message with your telephone number or e-mail address, Jennifer will return the call within 24 hours. Why do you usually get Jennifer's voice

mail? This is because Jennifer is either on the telephone or listening to your messages. She logs all calls and the results. A single call may result in Jennifer calling Linda Flores, the community manager, Donalea Bauer, Vice President at Lordon, our maintenance manager, or a vendor to schedule some work. Jennifer may also be trying to reach the Board for an item that requires Board involvement. There is a way to get in front of all these activities. When you get Jennifer's voice mail, hit zero. This will get you to the operator. Tell her that you want to wait to speak with Jennifer when she is off the telephone. If you get the voice mail then a second time, hit zero again and ask the operator to page Jennifer again. You WILL get through!

**Surfside III Direct Contact:**

Surfside III COA  
600 Sunfish Way  
Port Hueneme, CA 93041  
[www.surfsideiii.com](http://www.surfsideiii.com)  
[manager@surfsideiii.com](mailto:manager@surfsideiii.com)

**Management Company:**

Lordon Property Management  
31416 Agoura Road, Suite 105  
Westlake Village, CA 91361

**Jennifer M. Critchfield, assistant community manager**

Email: [jcritchfield@lordonmanagement.com](mailto:jcritchfield@lordonmanagement.com)  
Phone: 800-729-5673 x 3380

**Linda Flores, community manager**

Email: [manager@surfsideiii.com](mailto:manager@surfsideiii.com)

**Donalea Bauer, Vice President**

Email: [donaleabauer@lordonmanagement.com](mailto:donaleabauer@lordonmanagement.com)  
Phone: 800-729-5673 x 3342

**Our 2006 Board:**

Bill Betts - President [bill.betts@surfsideiii.com](mailto:bill.betts@surfsideiii.com)  
Ira Green - Vice-president [ira.green@surfsidediii.com](mailto:ira.green@surfsidediii.com)  
Inna Giler - Treasurer [inna.giler@surfsideiii.com](mailto:inna.giler@surfsideiii.com)  
Karl Twyman - Secretary [karl.twyman@surfsideiii.com](mailto:karl.twyman@surfsideiii.com)  
Joe Dehorty - Director [joe.dehorty@surfsideiii.com](mailto:joe.dehorty@surfsideiii.com)

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**LORDON MANAGEMENT DEPARTMENT EXTENSIONS**

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**MAINTENANCE, KEYS, REMOTES, CARDS, GENERAL CONCERNS/QUESTIONS**

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**Jennifer ext. 3380:** [jennifercritchfield@lordonmanagement.com](mailto:jennifercritchfield@lordonmanagement.com)

1. Maintenance concerns/questions
  2. Request for keys/cards/remotes
  3. General questions/concerns
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**ESCROW**

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**Chelia ext. 3339:** [chelia@lordonmanagement.com](mailto:chelia@lordonmanagement.com)

1. If an appraiser calls for information regarding the complex...
2. If an escrow company or homeowner calls for documents, certification form or a demand statement...
3. If an escrow company wants information on a special assessment or litigation for their escrow...
4. If a homeowner is requesting for a refund on from the close of their escrow...
5. If someone wants to know what the association covers...

**INSURANCE, LIEN AND LEGAL**

**Charisse ext 3338:** [cpatterson@lordonmanagement.com](mailto:cpatterson@lordonmanagement.com)

1. If a homeowner calls for a copy of the insurance or insurance information on their association...
2. If a homeowner calls and wants to place a claim...
3. If a homeowner is calling about a lien letter or lien...
4. If a homeowner would like to have a lien released...
5. If a homeowner wants to place their account on hold...
6. If a homeowner received a letter from their lender saying that they do not have insurance...
7. If a homeowner calls and they are with an attorney...

**ACCOUNTING DEPARTMENT**

**Stacie ext 3319:** [sgarman@lordonmanagement.com](mailto:sgarman@lordonmanagement.com)

1. If the homeowner is calling about their bill, late charge or payment...
2. If the homeowner would like to be set up on Auto Pay or a Payment Plan...
3. If the homeowner would like to change their mailing address...
4. If the vendor is calling on payment for an invoice...