

STONEBROOKE HOMEOWNERS' ASSOCIATION MEETING

APRIL 10, 2025

I. Call to Order & Financials

There were 43 homes represented.

Sara called the meeting to order at 5:35 pm.

Sara Heatherly introduced herself (Vice President of Development at Lowder New Homes), Amanda Miller (HOA Manager), Tanner Bozeman (Colonial Company), and Dawn Starnes (Lowder New Homes representative) and Jimmy Rutland (President, Lowder New Homes).

Introduction of Guest, Councilman Ed Grimes; planning a town hall meeting at Faulkner in the next month. Speeding, crime, etc. He noted that he felt the main concern in Stoneybrooke was speeding; it is an ongoing problem and neighborhood may want to consider speed bumps but that would be an HOA decision. He understands the trouble intersection near SB; he is in support of a new exit at Mt. Meigs, but a study has to be done and it will take years to come to fruition. He asked if there were any questions.

Attendee asked if there had been any arrests in the shooting that happened in the neighborhood last year? He said he was unsure.

Attendee comment regarding needing more streetlights; Lismore Circle, also people parking across the sidewalks (when they're in their driveways).

Sara advised we can revisit this in the open discussion portion of the meeting.

Another attendee commented regarding concerns over pot smoking from kids coming off the bus smelling of weed. Councilman Grimes suggested reaching out to Leese Keith with the board of education. If this is happening when the students are coming off the bus, than Montgomery Public Schools needs to get involved.

Sara introduced the 2024 minutes. Asked if there were any corrections/comments. There were none. Approval of 2024 minutes.

Review of Financial

- 2024 Year End Actual
- 2025 Budget
- 2024 vs 2025 Comparison
- **Jeremy Altum (704 Charlemont Lane):** Issue previously with unpaid dues. Is that still a problem? Have made significant strides. About \$80,000-\$90,000 of unpaid dues as of end of January 2025 about same amount. But since then, have been reaching out individually have collected around \$30k. Currently \$60k of unpaid. About \$40k of that individuals been turned over to collections. The \$20k is made up of residents owing less than 1 years worth of dues.
- **Nancy Ausley (10417 Treviso Place):** Her and her neighbor did not receive their dues statements.
Sara: We received reports from numerous residents about statements not being received. They were sent out, so we are unsure of what happened.
- **Debra McClain (10747 Lismore Circle):** As far as paying online, can we change the amount and pay a different amount?

Tanner: With the way the system works, it will show you the most recent invoice amount, but you can change amount you'd like to pay.

Debra: Did try to change the amount she wanted to pay, but it did not work.

Tanner: We will look into the issue.

- **Carolyn Robinson (355 Lismore Place):** Put my dues in the box in January. Then she got an ugly letter.

Sara: Regarding the letter, it was sent to all those that had yet to pay their January dues. The letter is standard.

Approval of the 2024 and 2025 budgets.

There will be a 10% increase in dues, from \$26 to \$28.60 starting July 1, 2025.

- **Jeremy Altum (704 Charlemont Lane):** In one of the budgets in years passed there was some outstanding money that was due. Was that related to the subsidy?

Sara: There was originally \$170k owed as the developer subsidy, but we have paid everything back minus \$36k. We will discuss this further when we go over transition portion of this meeting.

- **Sylvia Meyers (10456 Treviso Place):** Didn't we just have an increase?

Sara: It has been 2 years since the last increase.

History of Dues: StoneyBrooke started in 2005, started out at \$20 a month

No increase until 2016 – increased to \$22/mth

2018 increase to \$24/mth

2023 increase to \$26/mth

2025 10% increase

Approval of the 2024 and 2025 budgets.

II. Neighborhood Development

608 homes currently. Approx 25 lots remaining. Includes houses currently under construction. Only a handful of vacant lots left. The goal for 2025 is to close 21 lots, which would only leave a few lots to be built in 2026. The goal is to be completed in 2026.

Last year we put down the final layer of asphalt on Lismore Place, Plat 14. The only plat left to receive the final asphalt layer is plat 16. The City likes us to be 100% done with building before the final surface goes down.

Amanda Miller went over the purpose of the association: The purpose of the Association is to properly maintain the common areas in the community, manage insurance, contract services, utilities and other needed materials and services. The HOA is a partnership between the builder and the homeowners. The Board, Lowder New Homes at this time, is obligated to make ethical and legal decisions that best serve the entire neighborhood. An HOA is only concerned with what effects the entire subdivision, which helps maintain your individual home property value and your quality of living in the community. Fiduciary duty requires the board to ensure that the assessments you pay are used properly to maintain a neighborhood.

- **Sharon Williams (753 Evanwood Drive):** Does the HOA have rules regarding the color of a roof?

Sara: The rules for roof colors fall under the Architectural Review Committee (ARC) rules. You are supposed to get pre-approval. Some do, some don't. If they do not, a letter will be sent out.

Sharon: What action is taken?

Sara: It is determined on a case by case basis

Debra McClain (10747 Lismore Circle): What about door colors?

Sara: Anything exterior needs to go through the ARC. For the most part you can use different colors for your front door. However, these and other requests are considered on a case by case basis. We will try and work with you, but you may need to make adjustments.

ARC is a subcommittee, something that will need to be filled by volunteers after the transition takes place.

Debra: What about fences? What are the options?

Sara: It depends. Houses backing up to playground are permitted a 4 foot fence at the rear. Other homes backing up to wooded areas would also be allowed a shorter fence at the rear. In all other cases, fences are required to be 6 feet tall.

III. HOA Transition

The current HOA Board met to discuss the next steps in transitioning over to the neighborhood. Over the last 3 years, at our HOA meetings, we have asked for resident interest in being on the Board. We currently have at least 3 residents who are interested in being on board.

We have decided to go with an HOA management company. Met with 2: HOA Alabama and Associa McKay. This would still require an HOA Board comprised of a minimum of 3 residents, but a management company would do all the work behind the scenes, all the items that fall under the purpose of the HOA.

Transition will happen towards the end of this year.

- **Carolyn Robinson (355 Lismore Place):** Interested in being on the board.

Sara: We can have up to 7 Board members.

Tammy Shaw (813 Charlemont Lane): Also interested.

Leslie Clark (242 StoneyBrooke Way): Wanted to ensure we had her name on the list of those interested.

- **Jeremy Altum (704 Charlemont Lane):** How much will the management company cost per year?

Sara: \$32,000 per year, \$2,700 a month.

- **Ed Bertarelli (429 Ballina Way):** What is the length of the contract?

Sara: We have discussed a 2-year contract.

- **Tamara Turner (10453 Duncannon Trail):** After 2 years, what happens? Do we vote for another company?

Sara: That would be up to the board to make the decision. They would want to take into consideration feedback from residents, etc.

- **Debra McClain (10747 Lismore Circle):** If we don't like the management company, what kind of complaints would warrant changing to another company?

Sara: If you have issues now, you talk to us. If you have issues then, you will communicate to the resident run HOA board.

- **Annette Russell (639 Glenmede Lane):** The current Board chose to reach out to a management company, but because we are transitioning, if people step up, we could save on paying a management company. Lowder made that decision, and they have already signed contract

Sara: Correction, we have not signed a contract yet. If enough residents are interested, we can meet to discuss. Some of the things that will be needed: accounting, violations, ARC, and more.

Would need to have that meeting in the next month or so, in order to move forward with the transition.

- **Annie Ellison (10357 Duncannon Trail):** In the meetings with the management company, did we have prospective members present?

Sara: No, we had our Board present, but we can meet again with them and the residents interested in being on

the Board.

- **Annette Russell (639 Glenmede Lane):** What is the time period for negotiating this?
Sara: October 1st is when they'd like to take over, in order to get on top of invoicing etc. Therefore the decision needs to be made no later than September.
- **Janice Peterson (1146 Overture Drive):** concerned about number of cars parked on the street. Really difficult with parking on each side of the street.
Sara: per covenants
They are public streets. We can only ask people to move their vehicles. Amanda does the best she can. Beyond asking them, there isn't much else we can do.
- **Renate Rice (311 Lismore Place):** Adding to parking issues: if there would be an emergency, vehicles would not be able to get in. issue with cars parked across the sidewalk.
Sara: Please reach out to Amanda, she will send out a letter.
Renate: I am having to walk out into the street because the sidewalk is blocked by vehicles parking over the sidewalk.
Would also like to have more street lights in my area.
Sara: Cost to install new street lights run around \$5k each. The street light placement was approved by the City of Montgomery during the development phase.
Regarding speed humps/bumps, remember we have the head of Traffic Engineering as our guest speaker last year, who went over the entire process for getting speed bumps. We did a speed study and our neighborhood was not determined to need them. Therefore, the HOA would have to pay for them. Grimes may give us money. But the neighborhood would have to sign off on it (majority, check notes from last year, 60% some percent)
- **Annie Ellison (10357 Duncannon Trail):** nothing that will ever be done about cars being parked on the street? Is it the HOA, can it be resolved with the mgmt. company?
Sara: people parking on the street aren't always the ones attending the meetings. Legally, we cannot do anything. If the vehicle is broken down or has other issues the City of Montgomery can step in, but our hands are tied if they park for less than 24hrs.
Amanda: legally, we have to abide by the city of Montgomery, public streets, we would get sued.
- **Kathy Henry (10636 Harcourt Trace):** We had a car on our street with flat tires for at least 3 months, it seems that no one is enforcing the rules
Amanda: We work hard to enforce the rules in a cost effective and legal manner.
- **Ed Bertarelli (429 Ballina Way):** Speed strips should be considered. Different than speed bumps or humps. Cost effective. We can get a public safety grant to cover the cost.
Call 311 to get them to tag vehicles that are abandoned. In fact, utility 311 for all things city related. Report online so you can watch the progress of the report as it is tracked and often updated throughout the process.
- **Ed Bertarelli (429 Ballina Way):** What is the Board's position regarding short term rentals?
Sara: We have been doing stuff in the background to research changing the bylaws to prohibit short term rentals. Consulting with other HOA's and attorneys in the area. There are not currently many HOAs that have restrictions in their rules, so there have not been a lot of local examples of success in updating the rules.
We have consulted with our attorney to instead create language for amending the rules. We would create the wording, then the new Board will process the change. It would be the responsibility of the new board to implement that change.

- **Ken Henry (10636 Harcourt Trace):** This new management company at \$32,000 per year. Is that what you think you're worth?
Sara: StoneyBrooke's budget currently contributes \$7,000 to the HOA Managers salary, and Tanner's services are provided for free. If you take in the actual cost it would take for an HOA Manager and an accountant, and then throw in the violation checking, ARC items, etc. then \$32,000 per year is a very reasonable cost.
- **Debra McClain (10747 Lismore Circle):** Regarding cars parked on the street, what about having a closed gate? If it were gated, would streets still be public?
Sara: The streets would then be considered private, but that is not something that the neighborhood would want. All streets being private would mean the HOA would be financially responsible for all street repairs, maintenance, sidewalks, curb and gutter, paving, etc.
- **Judith Woodall (1004 Russborough Trace):** Deer Creek has gates that close at night, does that make their streets private? Why can't we have gates that close at night?
Sara: That's something that could be discussed with the new Board, but you have to take into consideration the maintenance cost. Running into the gates, monthly maintenance, etc. Plus, the cost to make them operable.
- **Debra McClain (10747 Lismore Circle):** But with those risks, wouldn't it still keep streets from being private?
Sara: Yes, but the HOA would need to add at least \$10,000 in gate expenses per year, and that's after the cost associated with making them operable gates. That is not something we would currently be interested in doing.
Debra: But if someone hit the gate, wouldn't they be responsible?
Sara: Yes, but it's not that simple. If the gate is hit, chances are it will not be operable for a period of time. If we wanted to get the gates fixed quickly, we would have to pay for that while we waited and hoped that their insurance did not take too long to pay us back. It could be a situation where the person doesn't have insurance and the HOA would be fully responsible.
- **Renate Rice (311 Lismore Place):** Do we have cameras at the gate?
Sara: Yes, at the entrance. We have 2 cameras pointing out, and 2 cameras pointing in.
- **Ken Henry (10636 Harcourt Trace):** looking at the budget under revenue and expenses, what is the income loss?
Sara: If it's in parentheses that means it's a loss, this is not in parentheses.
Ken: If pay off \$36k of subsidy, will dues go down?
Sara: No. Due to the cost of living rises each year, it is not feasible for the dues to go down any time soon. Our goal is always to ensure there is at least one year's worth of expenses in savings.
- **Tammy Shaw (813 Charlemont Lane):** Shared experience of having to go into a lot of gated communities in her old job, and there were always issues with gates breaking down, people can't get to work. They are a big expense, and just overall a problem.
- **Shannon Kelly (431 StoneyBrooke Way):** Do we have it set up with license plate readers to have stolen vehicles automatically reported?
Amanda: We updated cameras a couple of years ago, but did not go with the flock cameras that read license plates and communicate in real time to the local police department. Flock was not a consideration as they weren't as well-known of a company as they are now. However, it would be too expensive to update the cameras again, and Flock has a much higher yearly cost.
- **Judith Woodall (1004 Russborough Trace):** What do the cameras do?
Sara: They pick up anyone coming in and out of the neighborhood. Reading tags.
Amanda: We are partnered with the Montgomery Police Department through their program Star Watch.

Meeting adjourned at 6:30 pm.