

COMMUNITY SUPPORT ROLES AS OF 4/1/2025	
<u>METRO DISTRICT</u> via Management Trust	<u>HOA</u> Via AMI
Management of all Facilities, Club House(s), Boat House, Grounds, Monuments, Water Features & Pools	Architectural Design Review
All Capital Improvement Projects	Covenant Compliance
All Events, Activities, Classes, Reservations at the Southshore Clubhouse(s) and grounds	Trash
All Vendor Management	Social Committee_(Management Trust contract includes dedicated team available for social committee support)
Facilities Committee	
Communications Committee	
Landscape Committee	

YOUR TAX & HOA DOLLARS AT WORK SOUTHSHORE FULL TIME EMPLOYEE (FTE) COMPARISON			
ROLES/RESPONSIBILITIES	PRIOR TO 4/1/24	CURRENT	HOA ADDED REQUEST
DEDICATED SUPPORT HOURS - FACILITIES, PROGRAM AND EVENT MANAGEMENT	3.75 FTE	7 FTE (90% Increase)	2-4 FT
	1 FT Facility Director 2 FT Coordinators 0.75 PT Support	1 FT General Manager, 1 FT Lifestyle Director, 1 FT Lifestyle Associate, 1 FT Maint. Foreman, 1 FT Maintenance Tech, 2 FT Receptionists	
DEDICATED SUPPORT HOURS - LANDSCAPING VENDOR	0	1.4 FTE May-Oct for irrigation repairs, work orders, emergency irrigation alerts and trash policing.	0

- Recent homeowner feedback suggested additional onsite staffing support. Under The Management Trust's contract, onsite staffing hours will increase by almost 90% to align with homeowner priorities in supporting community operations, programming, events, the HOA's Social Committee needs, and maintaining our facilities and property.
- This improvement in support and lifestyle experience was determined to be feasible through utilizing the inevitable increase in revenues related to adjustments in assessed values. To further accommodate these requests, it is anticipated services provided by increased in-house staffing will reduce reliance on costly external resources (EX: legal counsel, public accountants, cleaning, maintenance, landscape service, engineers, etc.).
- Current HOA budget proposals show a reduction in monthly assessments, which is appreciated. However, recommended fee structures include increases to staffing beyond the District's 90% increase, which only went into effect on 4/1/24.
- To ensure justification for homeowner expense, it is recommended we observe how the district's increased staffing impacts the community before suggesting further increases through adding or retaining positions, specifically those roles that include responsibilities covered under the current Management Trust expense/contract.
- This strategy would align to the transition plan for the other large community vendors such as landscaping, which was also operationalized 4/1/2024. Specifically, there is no recommendation from the HOA or landscaping committee for Keesen Landscaping be retained for services that Cox Landscaping is now responsible to provide. Consistency in transition and assessment processes to properly steward homeowner funding is recommended.