

# Sterling Ridge Home Owners Association

## STANDARD OPERATING PROCEDURES

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# **1 Purpose, Board Adoption and Changes**

## **1.1 Purpose**

The Sterling Ridge Home Owners Association (SRHOA) Board of Directors (BOD), in accordance with the Association's **By-laws**, specifically **Article IV, "Board of Directors"**, is charged with governing the affairs of the Association. The purpose of this document is to establish the SRHOA Standard Operating Procedures (SOP) for the BOD, Officers, Committees, and Committee Chairs.

The SOP is a compilation of policies, processes, and procedures that document how the SRHOA Board of Directors, Officers, and Committees will conduct the affairs of the Association. It is based in the Association's Covenants and By-laws and accepted business practices (see Appendix B). If the SOP conflicts with the By-laws or Covenants, the By-laws and Covenants always take precedence.

## **1.2 Board Adoption and Changes**

The initial SOP was adopted in October 2024 after review and vote by the Board. The SOP should be reviewed and consulted as a guide for conducting board business. At no time should this SOP hinder or impede the execution of the duties of the Board. In the event that updates or changes to this document are necessary, these changes will be reviewed by the BOD and approved by a majority vote.

# **2 Roles and Responsibilities**

The President, Vice President, Treasurer, and Secretary are officers of the Association with specific responsibilities regarding running the Association's business. The following expands on the roles and responsibilities of Association positions as defined in the **By-laws, Article IV, Section 4.12 "Powers", Article IV, Section 4.13 "Duties", and Article V, "Officers and Their Duties"**.

## **2.1 President**

The President must be a member of the BOD and elected by the BOD to serve in the position of President. The President only votes on matters before the BOD in the cases of ties. He/she does have the ability to make motions. The President has two distinct roles with associated responsibilities:

- a. The President is the Chief Executive Officer (CEO) of the Association. As the CEO, he/she has the following responsibilities.
  - 1) Serves as the primary representative of the Association with outside entities (i.e. city and county governments, other HOAs, businesses, etc.)
  - 2) Oversees the business of the SRHOA and executes contracts on behalf of the SRHOA
  - 3) Identifies and documents physical assets of the SRHOA
  - 4) Maintains oversight of the Secretary and Treasurer
- b. As the President of the BOD he/she has the following responsibilities.
  - 1) Serves as the "face" of the Board of Directors to the Association

members; communicates BOD decisions and direction; listens to SRHOA member concerns and complaints; and facilitates resolution with Committee Chairs and the BOD

- 2) Schedules and presides over all Board and other Association meetings (e.g. Annual and Semi-annual BOD, Annual Membership, other special meetings as deemed necessary)
- 3) Oversees implementation of the decisions of the Board
- 4) Provides assistance to Committee Chairs when requested.

## 2.2 Vice President

The Vice President (VP) is a member of the BOD and elected by the BOD to serve as Vice President. The Vice President is a voting member of the BOD unless he/she is acting as President. The VP has the following responsibilities:

- a. The Vice President assumes the role and responsibilities of the President during his/her absences. Should the President become incapacitated or resign, the VP will act as the president until such time that the BOD elects a new President
- b. The VP serves as the “Gatekeeper” for discussions during BOD and other SRHOA meetings ensuring the speaker stays on point with regards to the agenda and/or the motion before the board. The VP also is the “Timekeeper” ensuring agreed to time limits for addresses and discussions before the Board and other SRHOA meetings are adhered to
- c. The VP serves as the official keeper of the “Parliamentary Roberts Rules of Order” and umpire for all “Points of Order” before the board.

## 2.3 Treasurer

The Treasurer is a member of the BOD and elected by the BOD to serve as the Treasurer. The Treasurer is a voting member of the BOD. The Treasurer is the Chief Financial Officer (CFO) of the Association. As the CFO, he/she is responsible for all aspects of the SRHOA’s finances. The Treasurer has the following specific responsibilities:

- a. Develops the annual operating budget for the following year, modifies the current year’s budget at the direction of the BOD
- b. Oversees the maintenance of the SRHOA’s books, receipts, disbursements and deposits, and the preparation of financial statements and tax returns
- c. Oversees committee budget expenditures to ensure committees are remaining within budget (primary responsibility rests with respective Chairs)
- d. Oversees SRHOA contracts associated with financial management (e.g. accountants, vendors, etc.)
- e. Oversees SRHOA’s financial assets and securities
- f. Chairs or co-chairs the Budget and Finance Committee
- g. Maintains a current list of all homeowners within the SRHOA community
- h. Provides information regarding new homeowners to the Secretary and Communications Committee

## 2.4 Secretary

The Secretary is elected by the BOD to serve as the Secretary. The Secretary is a voting member of the BOD. The Secretary is the Chief Administrative Officer (CAO) of the Association. The Secretary has the following responsibilities:

- a. Ensures proper documenting of all BOD actions (e.g. BOD minutes, BOD Resolutions, etc.)
- b. Ensures proper maintenance of SRHOA administrative (as distinguished from financial) records
- c. Solicits nominees, conducts the election process, notifies those elected, and certifies the results of the Annual Election of the BOD
- d. Ensures proper notification to the Association of BOD meetings, Town Hall Meetings, and other related activities

## 2.5 Members of the Board

Members of the BOD, elected by a majority vote of the SRHOA membership, or appointed by a majority vote of the BOD to fill a vacant position, have the following responsibilities:

- a. Ensuring that the affairs of the SRHOA are conducted in a manner that is consistent with the By-laws and the SOP
- b. Ensuring actions taken on behalf of the SRHOA by the BOD are in the best interest of the Association
- c. Ensuring Committee Chairs, acting on behalf of the BOD, execute their respective responsibilities consistent with BOD direction/intent
- d. Ensuring equal access and service to all members of the SRHOA.

## 2.6 Committee Chairs

Each member of the BOD, other than the President, is expected to assume a Committee Chair position. The Covenants and By-laws do not preclude the appointment of Committee Chairs from the general membership of the Association with the consent of the majority of the BOD. The Chairs for the respective committees are responsible for the following.

- a. Soliciting and securing SRHOA members to serve on their respective committee
- b. Within the general framework provided by the BOD, setting the direction for the committee for the year
- c. Working with the committee to execute the committee's agreed upon direction
- d. For committees (e.g. Covenants and Architectural Review) with supplemental documents from the By-laws, the Chair has the responsibility for developing and recommending updates as may be required
- e. If the committee has contracts (e.g. Grounds, Covenants, etc), overseeing the execution of those contracts
- f. Overseeing committee execution of BOD approved initiatives
- g. Developing and presenting information and motions to the BOD related to the committee's activities
- h. Developing and submitting an annual committee budget plan/request
- i. Managing the committee's approved annual budget
- j. Submitting annual report of key committee events and decisions.

## 3 Committees

The SRHOA Declaration and By-laws establish an Architectural Control Committee. In accordance with **By-laws, Article VII, Section 7.3 “Committees”**, in addition to this required committee, the Board may designate additional committees to perform such tasks and to serve for such periods as may be needed. Each committee is composed and operates in accordance with the terms of the resolution of the Board designating the committee or with rules adopted by the Board. Much of the business of the SRHOA is carried out through committees. Following are the standing committees and their respective purpose. Policies, processes, and procedures applicable to specific committee activities are included in Appendix C.

### 3.1 Architectural Control Committee

The Architectural Control Committee (ACC) exists to perform architectural standards review required by the **Covenants Article V**. The ACC is the only committee that is required to be established, in accordance with **By-laws Article VII, Section 7.3**. Architectural standards and use restrictions have been established for the Association and are documented in the Design Standards Handbook (**DSH**), commonly referred to as the ACC Handbook. Processes associated with the ACC committee can be found in Appendix C.

The committee oversees the Covenants enforcement, reviews violations when requested, and advises the Board regarding recommended sanctions.

### 3.2 Community Affairs

A Community Affairs Committee may be created by the BOD to provide for the welfare of the members of the Association by organizing events that are fun for all and provide the opportunity to get to know each other and strengthen the community.

### 3.3 Budget and Finance

A Budget and Finance Committee, chaired or co-chaired by the Treasurer, may be created by the BOD to develop in coordination with the chairs of the various committees and the President and Vice-President an annual operating budget for the Association.

### 3.4 Grounds Beautification Committee

A Grounds Beautification Committee may be created by the BOD to work with the grounds maintenance contractor retained by the SRHOA and volunteer members of the community to plan for the design, installation, and maintenance of the ornamental vegetation in the common areas of the association.

### 3.5 Communications

A Communications Committee may be created by the BOD to maintain and improve communications with the community. Means of communication may include the SRHOA Website and other electronic means of communication. The committee may also implement and/or oversee digital security and process automation. The

committee researches and recommends to the BOD the purchase, when required, to improve/replace current Association software, firmware, or hardware.

### 3.6 Other

Other committees or sub-committees may be created by the Board of Directors as needed for specific purposes/foci. Those committees will have a charter that minimally describes the purpose of the committee, committee membership and the length of time the committee will operate (if not specified, the committee will operate for a year and be reviewed for continuation or conversion to a standing committee by the new BOD).

## 4 Association Operations

### 4.1 Operating Budget

The **Budget (Bylaws Article IV, Section 4.05(a))** is a detailed projection of income from annual dues and/or assessments or other event revenues, and expenses based on forecasted ***operating costs*** during a given period, usually one year. It generally consists of major categories aligned with costs of operations, such as personnel salaries and benefits, taxes and insurance, grounds upkeep, clubhouse maintenance, and recreational facilities and community events. Since an operating budget is primarily associated with the short term, ***capital outlays are excluded*** because they are classified as long term and/or investment and/or capital improvement costs.

#### 4.1.1 Creation and Acceptance

One of the first and last acts taken by the BOD in any given year is creation of a Budget for the following year and acceptance/modification of the Budget by the new BOD. The budget is developed primarily based upon current year expenditures, as modified by known adjustments in income or expenses.

#### 4.1.2 Execution

The Treasurer tracks budget execution through posting of income and expenses in the PayHOA system. The Treasurer provides Board members with semi-annual budget execution information and highlights any concerns so that the BOD may take action as appropriate. Committee Chairs spend against and manage their respective committee budgets.

### 4.2 Annual Dues

As part of the annual Budget process, the BOD sets a General assessment (commonly referred to as “annual dues”) for each residence (**By-Laws, Article IV, Section 4.13(c)**). An invoice is sent to each resident by electronic notification to the email address on record of the resident, or by mail if the resident has not provided an email address. The notice shall specify the date the payment is due.

- a. Late Payments. When a payment is not received by the due date, a second invoice will be sent by the Treasurer by both email and USPS Certified mail. The Treasurer will decide when it is appropriate to refer the matter to a collection agency for collection. If the collection agency is not successful in



obtaining payment, then the Treasurer will refer the matter to the BOD to determine other appropriate action.

- b. Returned Checks. Returned checks, whether for annual dues, fines, or other appropriate payables, will be charged a fee of \$35.

### 4.3 Capital Reserves

Capital reserves are funds that are set aside for use with specific projects that present a long-term capital investment, or that may be related to some sort of capital expense in the future. The **Capital Reserve Fund** provides a means of incrementally accruing funds for anticipated future needs such as acquisition or replacement of fixed assets. A capital reserve may also be used for ongoing projects or as a means of preparing for some future project. The main idea behind a capital reserve fund is to set aside monetary assets that are outside the scope of an operating budget and can be used to offset capital expenses.

### 4.4 Checking and Saving/Money Market Accounts

The Association maintains checking and savings/money market accounts to conduct its business (**By-Laws, Article V, Section 5.8(d)**). Annual Dues are deposited into these accounts and are the primary basis to fund the Operating Budget. Accounts payable (bills) are paid from these accounts. Those payables include utility bills, monthly bills for active contracts (grounds, covenants, etc.), credit card, etc. Bills may be paid electronically or by check from the Association's checking account. Both the Treasurer and President shall have check-writing authority and access to the electronic banking system of the checking account to make any required payments or deposits.

- a. Credit/Debit Cards. The Association may maintain a credit card and/or debit card to be able to purchase supplies and limited equipment. Both the Treasurer and President may have an Association credit card/debit card. Credit card bills are reconciled at least monthly, and purchases applied to the appropriate element in the Operating Budget.
- b. Reimbursements. As part of conducting the Association's business, Board members and at times, members of selected Committees purchase items (consistent with the Operating Budget or as approved by the Board – such as the purchase of community event supplies, flowers, office supplies, new member welcome items, etc.). Individuals provide the Treasurer with appropriate documentation to be reimbursed. The Treasurer will prepare a check, or make an electronic transfer, to the individual for reimbursement.
- c. PayHOA. The Association uses PayHOA to manage and account for financial assets. The Treasurer maintains the PayHOA system.

### 4.5 Investments

The By-laws (**By-Laws, Article V, Section 5.8(d)**) allow for the deposit of funds into interest bearing accounts, such as Certificates of Deposit (CD). If CDs are utilized, they should be arranged in a manner (dates of maturity) to facilitate movement in and out to support items in the capital improvement plan.

### 4.6 Facilities and Property

The Association has facility and property assets. Care and maintenance of those facilities and properties are the responsibility of the BOD and respective Committee Chairs.

## **5 Conducting of Association Business**

### **5.1 Board of Directors**

The BOD conducts the Association's business through its standing committees, special committees, officers, and staff (if any). Additionally, the Board members converse electronically, by telephone and in person. The BOD meets periodically to hear from residents, reports from committees, and to decide upon matters before the Board.

#### **5.1.1 Board Meetings**

Dates for Board meetings are publicized to provide residents an opportunity to attend the meeting. Meetings are generally held semi-annually. The first meeting is held within 30 days of the Annual Membership meeting wherein the new BOD members are elected. A second meeting is held in September. Meetings are conducted generally under Roberts Rules of Orders. In order to provide the community ample time to review the agenda and prepare questions for any potential motions, the agenda should be published as much in advance as possible. Previous practice has been for the agenda to be sent out the Friday before the board meeting. However, the goal is to distribute the agenda 1 week in advance.

#### **5.1.2 Electronic Motions, Discussion, and Votes**

From time to time, it may be necessary for the Board to conduct business via email. A board member may make an electronic motion via group email to the board (sterlingridgehoa335@gmail.com) which must be seconded. There may be discussions and questions via email; the President may call for the vote, and all Directors should respond with their vote. The Secretary records the details of the vote, and these are recorded. Any motions made via email are presented at the next regular Board meeting.

From time to time, it may be necessary for the Board to conduct business via Zoom or other electronic video conferencing methods. Any Board meeting conducted via electronic video conferencing shall be documented by the Secretary in the same manner as any meeting conducted in person.

#### **5.1.3 Legal Counsel**

The BOD may decide to retain an attorney for the purpose of obtaining legal counsel on appropriate matters. Legal counsel is not to be sought without agreement of a majority of the BOD. When counsel is sought, the President or Vice President ensures that matters to be referred to the attorney are prepared in a manner that best ensures a useful response or product and can be done in a manner that minimizes the expense associated with obtaining counsel.

### **5.2 Records and Record Keeping**

It is important that the Association maintain accurate records. Overall responsibility

for record keeping falls to the BOD Secretary in his/her role as the association's Chief Administrative Officer.

## 5.3 Communications

BOD communication with the Sterling Ridge community is a critical element in conducting the Association's business. It supports the BOD's desire to be transparent in its business operations. The BOD uses multiple means to communicate. Mass email and the SRHOA Web site are the most expedient communications channels available to the Board. The regularly scheduled BOD meeting is the public forum where the Association conducts its business. It affords association members the opportunity to participate in the Association's deliberative process by hearing the debate and offering comments and suggestions. The BOD also uses the SRHOA web site and mass emails to communicate with members. As needed, the Board conducts Town Hall meetings and issues community-wide surveys to present issues and solicit community input.

### 5.3.1 Community-Wide Email

The BOD, SRHOA officers, and Committee Chairs use the community-wide email to alert residents of a variety of communications, from emergent security issues to routine community business such as BOD meeting announcements. Every effort is made to limit the number of emails.

Committee chairs may from time to time send out communications regarding specific events or issues that fall under their area. Other board members or even residents may request a community-wide email be sent when the topic may be in the interest of the association. The SRHOA Secretary is the primary decision maker on whether an email is appropriate for community-wide distribution. When in doubt, the SRHOA Secretary will consult with the BOD President or Vice President.

### 5.3.2 Website

The SRHOA Communications Committee chair (or the President or his delegate if there is no chair) maintains the SRHOA Web site. The website provides both an outward ("marketing") face to the world, as well as an inward face to the residents. Features available to the general public include:

- a. Descriptions of the area and of the Sterling Ridge community
- b. Listing of homes for sale in Sterling Ridge
- c. Covenants, by-laws, and architectural use restrictions

Features available only to registered Sterling Ridge residents include:

- a. Board member names and contact information
- b. Sterling Ridge member directory
- c. Community calendar
- d. Archives of community-wide emails
- e. Board meeting minutes and special reports
- f. Access to online payment options for annual dues
- g. FAQs

The website also includes a "general contact form" where any visitor may ask

questions, discuss concerns, or request information.

### 5.3.3 Nextdoor

Nextdoor is a third-party private social network for Sterling Ridge and its neighboring communities. Neither the SRHOA nor any of its members control this forum; however, it is a valid and powerful means of communication with the Sterling Ridge community as well as the surrounding neighborhoods. Any registered member may post on Nextdoor within their established guidelines. Any “classified ad” or “bulletin board” type communications should be posted here, as opposed to the Sterling Ridge website.

### 5.3.4 Surveys, Town Halls, Banners

The BOD may use any of these communications measures as needed.

- 1) Banners announcing special events and BOD meetings may be placed at the main entrance or common area prior to the event. They are to be removed the first business day after the event. The officer or committee chair responsible for placing the sign is responsible for its removal.
- 2) Town Hall meetings may be scheduled as needed by the BOD. Town Hall meetings should be for a specific issue; not a catch-all for multiple subjects. If possible, Town Hall meetings, including the discussion topic, must be announced via email, and posted to the SRHOA web site no later than 10 days prior to the event.
- 3) The BOD may elect to survey the community for its input on issues before the Board. The use of surveys should be limited to keep the community from getting “survey fatigue.” Surveys will be announced via email and posted on the SRHOA Website. Results should be released via email and posted on the website.

## Appendix A:

### Secretary's Validation of Acceptance of the SOP

The Sterling Ridge HOA Standard Operating Procedures have been accepted by a majority vote of the Board of Directors on this day, 10/29/2024.

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Derrick Medley  
Sterling Ridge HOA, Secretary

## Appendix B: SRHOA Governance and Operations

The Sterling Ridge Home Owners Association (SRHOA) was formed under the **(1) Declaration of Easements, Covenants, Conditions and Restrictions, and By-Laws** as recorded at the Gwinnett County Superior Court on December 3, 1998; **(2) Amendment to the Declaration of Easements, Covenants, Conditions and Restrictions to Adopt the Georgia Property Owners' Association Act**, as recorded at the Gwinnett County Superior Court on June 20, 2022; and **(3) Restatement of Covenants** as recorded at the Gwinnett County Superior Court on July 17, 2023; and is governed under the Restatement of Covenants. The Restatement is the Association's "source document", traditionally referred to as the "Covenants". The focus of the Declaration is General Covenants and Restrictions (**Article VI**) and Architectural Control and Rules (**Article V**), however there are numerous provisions (Articles) that cover a variety of subjects to include Association Membership and Assessments. Amendments to the Covenants in general require a two-thirds vote of the entire membership (**Georgia Property Owners Association Act**).

The Restatement contains one Exhibit: **Exhibit "A", By-Laws of Sterling Ridge Home Owners Association, Inc.** The focus of this Exhibit is the Association's Board of Directors and the conduct of the Association's business.

The Design Standards Handbook is a supplement to the "Covenants" focused on architectural standards and use restrictions. The document is referred to as the "ACC Handbook". The authority for the document is provided in the Covenants, specifically in Article V, Section 5.03(b)(1). Unlike the Covenants, which require a two-thirds vote of the Association membership to revise, the ACC Handbook may be revised by the Board of Directors by majority vote.

The SRHOA Standard Operating Procedures is a compilation of policies, processes, and procedures that document how the Board of Directors conducts the business of the Association. With yearly changes on the Board of Directors, the SOP is intended to provide continuity between Boards and consistency in the way the Board conducts the Association's business. The SOP is also intended to be a central document for Association members, that provides information on the many policies and procedures related to operation of the Association.

# Appendix C: ACC Procedures

## C.1 ACC Application Procedures

The Architectural Control Committee (known as the “ACC”) is established to review new or modified construction plans for compliance with the Design Standards Handbook (known as the “ACC Handbook”). The standards as set forth in the ACC Handbook are generally clear and straight forward. However, the ACC is the sole arbiter of such plans and may withhold approval for any reason, including purely aesthetic reasons **(Covenants, Article V, Section 5.07)**. Because not every situation is the same, the ACC may also grant variances to Architectural Standards when requested and if deemed aesthetically harmonious with the surrounding neighborhood and does not detract from or decrease value of the neighborhood as a whole. The ACC will use common sense in considering all applications and determine what is in the best interest of the applicant resident and the community as a whole.

### C.1.1 Application for New Construction or Architectural Improvements

1. Residents will complete an Application for Architectural Improvement Request (as shown in Appendix G, and located on the SRHOA website, and submit the completed form to the SRHOA website or the ACC Chair. The ACC Chair will log the request and then scan and send the application to the Board.
2. The Chair will review the request for completeness and conformance with the ACC Handbook standards. The Chair will contact the resident if additional information is needed, and the request may be returned to the resident to be revised if required. The Chair will then forward the request to all members of the committee. The Chair and/or members of the committee may arrange to visit the resident to discuss the request and obtain a visual inspection of the proposed work. Pictures may be taken to assist other reviewers in evaluating the request. The Chair will complete the “Site Visit” portion of the form following the visit to the resident.
3. At least a majority of committee member must review the request and provide recommendation to the Chair. All reviews of the request should be completed within 10 working days of logging the request. The review is then documented on the form. A majority of reviewers must vote to “recommend approval” for the application to be approved.
4. If the application is disapproved, the Chair will notify the resident and explain the reason for the disapproval. The Chair will attempt to work with the resident to pursue a possible solution if the resident so desires. The resident will be informed that they may appeal the decision to the Board if they so choose.
5. If the application is approved, the ACC Chair will inform the resident and advise the resident of the requirement to notify the Chair when the project is completed. The completed application will be filed as “In Suspense/Pending”.

6. When the resident notifies the ACC Chair that the project is completed, the Chair may choose to inspect the work to ensure it has been completed in accordance with the approved application (recommended in those cases where there may be concern on the part of the ACC). If the work is determined to have been completed in accordance with the approved application the application will be filed as “Approved/Complete”. As residents sometimes do not notify the office of project completion, the ACC will periodically check applications in suspense to ascertain their status. If the work is determined to have been completed not in accordance with the approved application, then the matter shall be referred to the BOD to be handled under the provisions of the Covenant Enforcement Procedures.

## C.1.2 Other Considerations

### 1. Changes Not Requiring Approval

The Covenants, **Article V, Section 5.05**, requires that any construction, alteration, or addition requires approval from the ACC. Generally, updates to homes that are not significant changes from the original approved design (e.g. re-painting in the same color, repair of a structure that does not alter the existing style) do not require application to the ARC. However, if a resident makes a change and does not obtain approval from the ARC as required by the Covenants, that item may be subsequently cited as a non-compliance at any time – there is no statute of limitations after which the change is automatically “approved.”

### 2. Updates to Architectural Standards

As architectural standards may change over time, such as due to availability of new materials or improvement of existing materials, the Board may elect to update the ACC Handbook. Updates to the architectural standards should not place any additional burden on existing property owners whose property met the architectural standards prior to amendment.

### 3. Grandfathering

If there is additional burden of cost or the SRHOA member has some conflict or circumstance that would preclude compliance with a new community standard, the item in question may be effectively “grandfathered” in by granting a Variance.



## Appendix D: Covenant Enforcement Procedures

### D.1 Covenants Procedures

The Sterling Ridge Board and Architectural Control Committee are interested in and dedicated to the education of residents about Covenant compliance and the benefits and advantages of living in a Covenant Protected community. The ACC Chair is encouraged to communicate throughout the year via Community emails with suggestions on how residents can improve their neighborhood and maintain the quality-of-life standards in our beautiful Sterling Ridge community.

#### **1. *Authority and Purpose.***

The Committee advises the Sterling Ridge Home Owners Association Board of Directors (SRHOA BOD) regarding violations of the Declaration, By-Laws, rules and regulations, Use Restrictions and design guidelines. The Committee also advises the Board regarding sanctions to be imposed for such violations.

#### **2. *Documents.***

(1) The Restatement of Declaration of Easements, Covenants, Conditions and Restrictions for Sterling Ridge Subdivision (the "Declaration") and (2) the Design Standards Handbook govern the operations and procedures of the ACC. Since it is impossible to cover every contingency in these documents, in cases not specifically/sufficiently covered in these documents, the ACC must often make judgments which are based on the interpretation of the intent of the Declaration. All Committee findings, decisions, actions, and advisements are subject to the review and approval of the SRHOA BOD.

#### **3. *Committee.***

The ACC Chair is appointed annually by the SRHOA BOD. All residents are eligible to become members of the Committee. Any resident interested in serving on the Committee should contact the Committee Chair. Committee meetings are planned and scheduled by the Chair as needed throughout the year and are held at the location specified by the Chair in the call for the meeting. Committee members are asked to become familiar with the governing documents and particularly with the ACC Handbook, and be prepared to offer opinions on acceptable Covenant compliance as relates to intent of the Declaration.

#### **4. *Procedures.***

- a. When a possible Covenant violation at (or associated with) a specific Sterling Ridge address or property is made known to the Committee, the Committee membership may be asked to further report on the violation to other members, to consider and discuss the reported violation with neighbors or other members, and/or to disclose pertinent details about

conditions reported at or observed at that property or behavior/activity observed and/or reported at or associated with the property. Such discussion and disclosure among and between members and involved/informed Sterling Ridge neighbors (who may not be Committee members) is required for Committee effectiveness and Covenant compliance.

- c. **Letter of Notice.** When a Covenant violation is determined to exist, a Letter of Notice, containing a specific description of the violation in question and the specific Covenants or Procedures section reference number, is sent by USPS Certified Mail to the property owner asking for compliance within 10 days, or asking that an acceptable written plan of action to abate the violation be forwarded and explaining the procedures for the requesting of an exception to the Covenant or how to request an appeal hearing before the Board. Notice letters for violations are prepared and mailed by the President, with copies emailed to the members of the Board.
- d. **Fining Letter.** If the violation continues and no acceptable written response has been received within 10 days of receipt of the Letter of Notice, then the President notifies the Treasurer (with copies emailed to the members of the Board), who sends the fining letter along with an invoice for the fine to the resident.
- e. **Daily Fee Accrual.** If no response has been received or the violation has not been abated, fees will begin to accrue at \$25/day beginning on the 10th day after receipt of the fining letter. The Treasurer notifies the Committee Chair and the members of the Board when daily fees are initiated.
- f. **Lien.** If the violation continues or no response has been received, or the existing fines have not been paid, and the fines and interest have accrued to an amount of \$300, the Treasurer will recommend to the Board that the debt be referred for collection. The Board shall vote on the recommendation. If the Board approves the recommendation, the Treasurer will refer the file to the collection agency. If the collection agency has not been able to collect within 90 days after referral, the Treasurer will advise the Board and recommend that a lien be placed on the property, which must be approved by majority vote of the Board. If approved, the Treasurer forwards the necessary information to the lawyer retained by SRHOA, who will prepare the lien. The lien must be signed by the President, after which the lawyer will file the lien and send notification to the resident.
- g. **Repeat Violations.** Certain violations that may be of short duration but are repeated (such as: leaving trash cans visible outside permitted times; parking so as to obstruct sidewalks; parking more than four vehicles in the driveway; etc.) may be subject to fines even if corrected after issuance of a Letter of Notice as provided in section c. above.

When a third Letter of Notice is issued to a resident within 180 days for the same type of violation, the President notifies the Treasurer (with copies emailed to the members of the Board). The Treasurer prepares and sends the fining letter along with an invoice for a \$100 fine to the resident. This

fine will be processed in accordance with the provisions of paragraphs c. through f. of this section.

## **5. Other Considerations**

- a. **Self Help.** The Covenants Article XIII, Section 2, authorize the Board to exercise “self-help,” whereby the Board may correct a violation at the property owner’s expense. Except in the case of emergency situations and towing, the Board must give the violating Owner ten (10) days' written notice of its intent to exercise self-help. All costs of self-help, including reasonable attorney's fees actually incurred are assessed against the Owner.

Because of the sensitivity and seriousness of taking action of this nature, the Board must carefully consider the repercussions before proceeding with self-help. Such action must be approved by a majority Board vote. Generally, the only time this action will be taken is in cases of potential harm to other residents.

- b. **City Ordinance Violations.** In cases where a covenants violation is also a city or county ordinance violation, the city/county may be contacted to report the violation. The city/county may investigate the report and, if a violation is confirmed, send a violation notice to the Owner. The Owner has some period of time to correct the issue, and if not corrected, the city/county may elect to remedy the violation at the Owner’s expense.
- c. **Rental Properties.** Per the Covenants Article VI, Section 5, Owners are required to obligate their tenants to all SRHOA covenants, rules and regulations. For violations occurring at rental properties, notice of violation is sent to the Owner of record, with a copy sent to the renter. It is the Owner’s responsibility to remedy the violation; any fines and/or fees are assessed against the Owner.

# Appendix E:

## Purchasing and Contracting Policies and Procedures

### E.1 Procedures

In general, multiple bids are required for contracted work to be performed by a third party vendor for the Sterling Ridge community when the expense is expected to be greater than \$3,000. Expenditures in this amount may also be considered “capital investments” and should be reviewed by the Board. Under this policy, the following actions are required:

1. The Board will define the scope of the project, which may include:
  - a. Description of goods/services to be purchased
  - b. Expected timeline
  - c. Rough order estimate of expected cost (if available)
2. The Board will review the preliminary details of the project
3. The Board may at this time determine, if the project is of like requirements and scope to previous projects with a satisfactory vendor, that competitive bids are not required
4. If the estimated cost is known, the Board may choose to approve the funds allocation (via motion and majority vote) prior to receiving bids; this allows the bids process to proceed quickly and with assurance to potential contractors that the funds are allocated. In this case, a subsequent motion/vote is not required, but the Board must report the chosen vendor and final cost to the President and the Treasurer before proceeding with the project.
5. If it is determined that competitive bids are required, the Treasurer will obtain proposals/bids from at least 3 appropriate vendors. The Board should consult with the Treasurer and Secretary to determine if there are previous vendors that have performed satisfactory work for the association. Recommendations may also be sought from board members, as well as local sources such as Nextdoor.
6. Once the bids are received, the Board will make a recommendation on the vendor selection based on the ability of the vendor to satisfactorily complete the job, any past experience with the vendor, quality, and cost.
7. Unless the Board has already approved the expenditure, the Treasurer will then make a motion to approve the project, the selected vendor, and the cost.
8. Exemptions and exclusions to this process are:
  - a. Emergency Contracts: bidding is not required if it would limit the ability of an association to obtain needed products and services in an emergency;
  - b. Sole Source Contracts: bidding is not required when the potential vendor is the only source of supply within the county [Gwinnett, GA]; and

- c. Renewals of Contracts Awarded Under the Competitive Bidding Process: if a contract is awarded under the competitive bidding process and contains renewal options, then it may be renewed without further bidding so long as 1) the contract contains a provision that allows the board to cancel the contract on 30 days' notice, 2) the Treasurer validates funds are available to cover the option period, and 3) the committee chair (if any) for the respective contract believes the prices in the option are still fair and reasonable given the market conditions at that time.

# Appendix F: Long Range Planning

## F.1 Procedures and Processes

The SRHOA Board will develop and maintain the Sterling Hill Long Range Plan (LRP) consisting of a Capital Improvement Plan (CIP) and a Capital Reserve Fund (CRF) budget account. The Board will determine the recommended Capital Reserve Replenishment amount necessary, in its judgment, to ensure sufficient funds are set aside annually to cover the projected costs of near term and future capital improvements, repairs, modernization and enhancements to SRHOA property as deemed to be necessary in order to fulfill the SRHOA's vision and goals of the community.

Additionally, access to and use of said funds must be approved by the BOD by majority vote.

Further the Board will conduct such studies and needs analysis on future requirements or opportunities of the SRHOA as may be deemed consistent with this charter.

### 1. **Purpose**

The purpose of Long Range Planning is to provide the methodology for **forecasting** and **budgeting** for continuing sustainment and improvement of the common areas and capital assets of the Sterling Ridge Community. Long Range Planning requires dedicated effort and financial discipline.

### 2. **Responsibilities**

The SRHOA Treasurer is a primarily responsible for the development of the LRP. By virtue of position and in concert with the by-laws, each Board Member and other Committee Chair has a fiduciary responsibility to support the goals of the LRP. The Board solicits volunteers from among the owner-occupants of the community. The Treasurer will advise the Board on the proper budgeting, replenishment, and expenditure of the Capital Reserve Fund and coordinate with the Board on the demarcation of the Operating Budget and the Capital Reserve Fund.

### 3. **Vision, Mission, and Goals for the Sterling Ridge Community**

**Vision:** Sterling Ridge is warm, inviting, vibrant, and neighborly (*inclusive*), and a desirable residential community in Gwinnett County

**Mission Statement:** The SRHOA Board of Directors earns value for the Association by: encouraging and enhancing the sense of community; protecting and enhancing property values for residents; maintaining and improving the infrastructure, facilities, equipment and property of the Association; and conserving resources, protecting the environment and promoting a high quality of life -- all in a fiscally responsible and balanced manner.

**Goals:**

- Support a high residential quality of life
- Provide visually appealing, inviting, and safe environment, grounds, and facilities
- Provide SRHOA Members with financial security (*peace of mind*) through diligent forecasting and budgeting of future costs

#### 4. Terms and Definitions

- **Forecasting** is the activity of predicting what will happen in the future, largely expressed in terms of past experience and life cycle predictions and especially the organization's own key figures. The important element is that it is based upon certain general assumptions regarding costs and longevity.
- **Budgeting** expresses what the organization believes is specifically achievable by its planned actions. The budget is a target that the SRHOA sets for itself, so that the budget becomes the commitment to action by the Board of Directors.
- The **Operating Budget** is a detailed projection of income from annual dues and/or assessments or other event revenues, and expenses based on forecasted operating costs during a given period, usually one year. It generally consists of major categories aligned with costs of operations, such as taxes and insurance, grounds upkeep, and community events. Since an operating budget is primarily associated with the short term, capital outlays are excluded because they are classified as long term and/or investment and/or capital improvement costs.
- **Capital reserves** are funds that are set aside for use with specific projects that present a long-term capital investment, or that may be related to some sort of capital expense in the future. The **Capital Reserve Fund** provides a means of incrementally accruing funds for anticipated future needs such as acquisition or replacement of fixed assets. A capital reserve may also be used for ongoing projects or as a means of preparing for some future project. The main idea behind a capital reserve fund is to set aside monetary assets that are outside the scope of an operating budget, and can be used to offset capital expenses. The Capital Reserve Fund has at least two component funds, the **Capital Improvement Plan** and the **Contingency Fund**.
- The **Capital Improvement Plan** is an outcome of long range planning and provides a detailed replacement cost analysis guide and projected annualized budgets over the long term for sustainment, replacement, or improvement of the physical property and capital assets of the SRHOA.
- The **Contingency Fund** is a set aside of funds for emergencies or unexpected outflows. The contingency fund is often identified as a disaster recovery fund. This makes it possible for the SRHOA to provide initial recovery to the community property when some type of natural disaster

takes place. It also serves as a backup against possible losses in income. When this is the case, the SRHOA Board of Directors can draw upon the contingency fund to cover shortfalls in operational costs, keeping key community services functioning.

- **Capital Reserve Replenishment or Reserve Rate** is an annual transfer of income from the operating budget to the Capital Reserve Fund to ensure the balance on hand in the Capital Reserve Fund is not less than the total of the anticipated capital expenditures planned for the next five years.
- **Long Range Planning** serves to guide the decisions of the Board of Directors, now and into the future, regarding scheduled and forecasted investments in common properties and improvements for the quality of life.

## 5. **Long Range Planning**

A sound budgeting process provides the roadmap to current year requirements, and properly sets aside funds for future needs. Leaders set a vision and develop a plan for the future. The Long Range Planning process provides a roadmap for the Association and its facilities and properties using a 5 year look into the future. Long Range Planning serves to guide the decisions of current and future Boards and Committees with regards to investments in property and facilities, equipment and infrastructure, given lifespan expectations and lifecycle costs and consideration of other opportunities as they arise. Long Range Planning yields three main products: the Capital Improvement Plan, the Contingency Fund and the boundaries for its application, and the Capital Reserve Fund replenishment scheme. Long Range Planning helps with the overall Association budgeting process by forecasting when capital repairs, modernization, investment or replacement will be required to sustain, maintain and improve the Sterling Ridge community environment. At a minimum, the Board will review the overall plan on an annual basis during the Operating Budget cycle.

The major categories are:

- **Grounds:** Common area monument, front entry brick walls, fences, detention ponds
- **Infrastructure:** Irrigation systems, entry illumination lights, surveillance system

An initial detailed survey of all the association's assets subject to replacement or major repair/renovation must be accomplished to develop a major repair, renovation, replacement plan and schedule. The plan and schedule is essential to good forecasting. This plan and its schedule are called the Capital Improvement Plan.

### a. **Capital Improvement Plan (CIP)**

The Board develops the CIP in consultation with the committee chair of Grounds Beautification, along with the Officers of the SRHOA. The CIP lays out the renovations, replacement, improvement and major repair schedule of structures, infrastructure, equipment and other assets of the SRHOA in a methodical manner and guides the Capital Reserve Fund budget process.



## b. Capital Reserve Fund (CRF)

The purpose of the Capital Reserve Fund for SRHOA is to set aside funds for the planned inevitable replacements, renovation or major repair costs and improvements to the Common Property of our community. These are commonly referred to as capital improvements and are distinguishable from maintenance and minor repairs properly paid from the annual operating budget. Funds must be dedicated to capital improvements. Replenishment of the CRF cannot depend on “leftovers” from the operating budget. *The balance on hand in the Capital Reserve Fund should never be less than the total of the anticipated capital expenditures planned for the next five years.*

The Board is responsible for developing and managing the budget for the CRF. The resulting product is an invaluable tool in setting and assessing annual dues sufficiency to protect the SRHOA in the long-term. The CRF cash in-flow is based on an annualized value for Capital Reserve Replenishment, the annual amount to be transferred from income to the Capital Reserve Fund. The Capital Reserve Replenishment amount is established by determining, for each item, an estimated future replacement value, renovation or major repair cost and anticipated lifespan. These values are used to calculate an ascribed amount annually to be deposited in the CRF. If done consistently and responsibly there should not be a need (barring a natural disaster) for a special assessment.

**Example:** The entry wood picket fences constructed in 2010 have an estimated replacement cost of \$8,000 in the year 2040 (30-years lifespan). The amount needed to be set aside annually would be  $\$8,000 / 20$  or \$400. So, in years 2011 through 2020, \$400 would be set aside in each successive budget year so \$8,000 will be available in 2040.

The entry illumination system installed in 2000 has an estimated replacement cost of \$15,000 in the year 2040 (40-years lifespan). The amount needed to be set aside annually would be  $\$15,000 / 40$  or \$375. So, in years 2001 through 2040, \$375 would be set aside in each successive budget year so \$15,000 will be available in 2040.

In this example these are the only two items. Therefore, the total replenishment amount or Reserve Rate required to be set aside in the annual budget in 2001 through 2010 and deposited in the CRF would be \$375: the amount required to be set aside between 2011 and 2040 would be \$775 ( $\$375 + \$400$ ) in order to have sufficient funds available in 2040 for the replacement of these two items.

### Schedule

Below is a composite summary of five year expenditures broken down by the six major categories.

Category	2024-2028	2029-2033	2034-2038	2039-2043
Common area monument				

Front entry brick walls				
Fences				
Irrigation systems				
Entry illumination system				
Surveillance system				

## 6. **Conclusion**

A properly designed and executed LRP (a well-defined CIP and properly funded CRF) will go a long way toward meeting SRHOA goals of financial security (peace of mind) and a high quality of life and a visually appealing community to live and play in, which in the end positively contributes to home owner property value.

# Appendix G: Policies, Forms and Applications

## Form G-1

*Sterling Ridge*

### Homeowners Association, Inc.

335 Sterling Hill Drive  
Lawrenceville, GA 30046  
sterlingridgehoa335@gmail.com

### Seller's Notice to Sterling Ridge HOA of Buyers' Contact Information

**Article IX, Section 9.08 of the Sterling Ridge Covenants requires you as the Owner/Seller of a property within the subdivision to provide to the HOA the personal contact information of the buyer when you enter into a contract of sale for the property.**

Current Owner(s)/Seller(s) \_\_\_\_\_

Property Address \_\_\_\_\_

Estimated Closing Date \_\_\_\_\_

Buyer's full names \_\_\_\_\_

Buyer's current address \_\_\_\_\_

Buyer's email address (if available) \_\_\_\_\_

Buyer's cell phone number (if available) \_\_\_\_\_

Buyer's other phone number (optional) \_\_\_\_\_

\_\_\_\_\_  
Seller's Signature

Please complete this form and return it to the Treasurer prior to closing. If you do not submit this form prior to closing then this form will be required to be completed by your closing agent and submitted to Sterling Ridge HOA before a closing letter will be issued by the HOA to the closing agent.

## Form G-2

*Sterling Ridge*

### Homeowners Association, Inc.

335 Sterling Hill Drive  
Lawrenceville, GA 30046  
sterlingridgehoa335@gmail.com

**Date:** November 14, 2024

#### CLOSING LETTER

**TO:**

**Property Address:**

**Current Owner/Seller:**

**Estimated Closing Date:**

**HOA Dues:** Mandatory

**HOA Dues Amount:** \$

**Payment Frequency:** Annually

**Time Period Covered:** January 1 through December 31

**Dues Currently Paid Through:**

**Amount Owed for Dues/Penalties/Interest:** \$

**Good through date for amount owed:**

**Are there any current or pending special assessments:** ☐ Yes

☐ No

**If "Yes"; Amount Due: \$ Purpose of Assessment:**

**Additional Charges;**

**Initiation Fee:** \$250.00

**Capital Contribution Fee:** \$0.00

**Transfer Fee:** \$0.00

**Closing Letter Prep Fee:** \$100.00

**Other:** \$0.00

**No utilities are billed with the HOA Assessment.**

**Make HOA check payable to: Sterling Ridge HOA, Inc. in the amount of \$**

The undersigned certifies that he/she is authorized by the Homeowners Association to complete this form and acknowledges that the information provided will be relied upon by all parties to the closing transaction.

---

Bobbi Chadwick, Treasurer

## Form G-3

### APPLICATION FOR ARCHITECTURAL IMPROVEMENTS/CHANGES STERLING RIDGE HOME OWNERS ASSOCIATION, INC.

- This application approval expires 6 months from date of approval if work has not commenced.
- A sketch or blueprint must accompany t
- his form for review.
- Homeowners must obtain any needed building permits from Gwinnett County. Any approval of this application does not constitute any building permit required by any governmental entity.
- Homeowners must notify the ACC when the project is completed.
- Any changes to the work authorized by this approved application must be resubmitted to the ACC for review and approval before any changes are made.

Property Address: \_\_\_\_\_

Owner's Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Contractor: \_\_\_\_\_

Projected Start Date: \_\_\_\_\_ Projected Completion Date: \_\_\_\_\_

Type of change/improvement:

☐ Fence      ☐ Patio      ☐ Deck      ☐ Lighting      ☐ Retaining Wall  
☐ Painting      ☐ Landscaping      ☐ Structure      ☐ Drainage      ☐ Other

Comments: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Owner Signature & Date: \_\_\_\_\_

#### ***This Section for Architectural Control Committee Use Only***

**SITE VISIT DATE & SIGNATURE** \_\_\_\_\_

Plans Reviewed:    ☐ Blueprints    ☐ Sketches    ☐ Landscape    ☐ Drainage    ☐ Other

Comments: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Reviewer's Signature & Date: \_\_\_\_\_

Homeowner Completion Call Date \_\_\_\_\_ Date ACC Approved Completion \_\_\_\_\_

## Form G-4

STERLING RIDGE HOME OWNERS ASSOCIATION, INC.

### Certificate of Completion Compliance

**This Certificate of Completion Compliance** is issued this date to the named homeowner to certify that the work completed meets with the requirements set forth in the Covenants of Sterling Ridge Home Owners Association.

Owners Name: \_\_\_\_\_

Address of completed work: \_\_\_\_\_

Date of Application Submission: \_\_\_\_\_

Description of work completed: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date ACC approved completed work: \_\_\_\_\_

Reviewer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

This Certificate shall in no way be construed to certify the acceptability, sufficiency or approval by the ACC of the actual construction of structures or of the workmanship, or to represent or warrant to anyone the quality, function or operation of the structures or of any construction, workmanship, engineering, materials or equipment.

The issuance of the Certificate shall in no way be construed to certify to any party that the Structures have been built in accordance with any applicable rule or regulation, or in compliance with any governmental building code, or in accordance with every detail on the approved plans and specifications.

Form G-5

*Sterling Ridge*  
Home Owners Association

**CONTACT INFORMATION**

The Sterling Ridge Home Owners Association is required by its covenants and bylaws to maintain current contact information for each resident of the community. The purpose is to benefit the safety and convenience of all residents. In the case of an emergency at the premises, the HOA can contact the owner or provide contact information to city or county safety personnel.

Another reason for this requirement is to make it easier for the HOA to provide information to the residents in the most cost effective and timely manner.

The information required is:

Residents'/Owners' Name(s): \_\_\_\_\_

Are you the Owner? ☐ Yes ☐ No

Street Address: \_\_\_\_\_

Email address: \_\_\_\_\_

Primary Telephone (indicate whether cell or land line): \_\_\_\_\_

Secondary telephone\* (indicate whether cell or land line): \_\_\_\_\_

*\*Optional*

**If the Resident is not the Owner, attach a copy of your lease or rental agreement.**

You can provide this information by completing this form and depositing it in the HOA box attached to the mail box of the HOA Treasurer, or by emailing the information to the Secretary at the below address.

Derrick Medley, Secretary

Sterlingridgehoa335@gmail.com

Form G-6

*Sterling Ridge*  
Home Owners Association

**DISCLOSURE OF LEASE/RENTAL**

The Sterling Ridge HOA (Association) Covenants permit leasing/rental of the premises under the following circumstances, if such leasing/rental is disclosed to the Association, and subject to the restrictions contained in the Covenants of the Association:

1. The property is occupied by the owner, or by the parent, adult child, spouse, or sibling of the owner; and another person also occupies the premises. That other person(s) is defined as a lessee or renter, and must be disclosed to the Association.
2. The property is not occupied by the owner, or by any parent, adult child, spouse, or sibling of the owner, but is occupied by some other person(s). Such other persons are defined as being a lessee or renter. Such lease or rental must be disclosed to the Association.
3. The owner has been granted a Hardship Lease Permit by the Association.

As the owner of a property subject to the SRHOA Covenants which meets the definition of leasing/renting set forth in the Covenants, you are required to provide the following information.

Property Address: \_\_\_\_\_

Owner's Name: \_\_\_\_\_

1. Do you reside at this address? ☐ **Yes** ☐ **No**

- a. If "**Yes**" do you lease/rent any portion of the property to any person who is **not** your parent, adult child, spouse, or sibling? ☐ **Yes** ☐ **No**

If "**Yes**", provide the name and contact information of each such adult person.

Name: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

Name: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

If you need to identify additional persons, please add to the end of this form or attach a separate sheet.

2. If you do **NOT** reside at this address, provide your current residential address and contact information:

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Other Phone: \_\_\_\_\_

Email: \_\_\_\_\_



3. If you do **NOT** reside at this address, do any of your parents, adult children, spouse, or siblings reside at this address? ☐ **Yes** ☐ **No**

If "**Yes**", please provide the name, relationship, and contact information for each such person residing at the address.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

If you need to identify additional persons, please add to the end of this form or attach a separate sheet.

4. If you do **NOT** reside at this address, and none of your parents, adult children, spouse, or siblings reside at this address, do any other persons reside at this address? Any such person is defined as a lessee/renter. ☐ **Yes** ☐ **No**

If "**Yes**", please provide the name and contact information for each such adult person residing at the address.

Name: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

Name: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

Name: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

If you need to identify additional persons, please add to the end of this form or attach a separate sheet.

- a. Did each of these persons lease/rent the premises prior to July 17, 2023?

☐ **Yes** ☐ **No**

If "**Yes**", please attach a copy of the lease/rental agreement that was effective prior to July 17, 2023.

- b. Does the lease/rental agreement contain the language required under the SRHOA Covenants, Article VI, Section 6.02(b)(4) that requires the lessee/renter to comply with the provisions of the Association Covenants? ☐ **Yes** ☐ **No**

If "**No**", please advise when the lease/rental agreement will be amended to include the required language, and when you will provide a copy of the amended agreement.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Owner's signature \_\_\_\_\_ Date: \_\_\_\_\_

**Form G-7**

*Sterling Ridge*  
**Home Owners Association**

**HARDSHIP LEASING/RENTAL APPLICATION**

The SRHOA Covenants allow a homeowner to request the Board of Directors to grant a hardship leasing/rental of the promises, if the Board in its sole discretion determines that the circumstances would impose an “undue hardship” upon the homeowner if leasing/rental were not allowed. The applicant homeowner must provide information as requested by the Board to determine if the applicant qualifies for a hardship exemption permit from the leasing/rental restrictions of the SRHOA Covenants.

A hardship leasing permit is normally granted for a period of one year and must be re-applied for annually. The Board may grant an initial permit for a period greater than one year, but not more than two years. All renewal permits are limited to a period of one year.

Property Address: \_\_\_\_\_

Owner’s Name: \_\_\_\_\_

Applicant’s name if other than Owner: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

If the applicant is not the owner, please explain the relationship of the applicant to the owner, and why the applicant is asking for a hardship exemption.

\_\_\_\_\_  
\_\_\_\_\_

Was the property placed on the market for sale within the past 120 days? If “Yes” when was it placed on the market and is it still on the market?

\_\_\_\_\_  
\_\_\_\_\_

Please provide any details as to listing price and offers received.

\_\_\_\_\_  
\_\_\_\_\_

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[illegible]