



PINE ORCHARD ASSOCIATION
Branford, Connecticut

**NOTICE: PINE ORCHARD ASSOCIATION
EXECUTIVE BOARD MEETING
MONDAY MARCH 2nd, 2026, AT 7PM
AGENDA NOTED BELOW**

At the call of the President, The Pine Orchard Executive Board will hold its January Executive Board Meeting at the POA offices at 180 Pine Orchards Road and via Zoom™ on Monday March 2nd, 2026, at 7PM. All are welcome to attend.

1) Call to order

2) Approve minutes from Jan. 5th, 2026, Executive Board Meeting

3) Officers and Committee Reports

- By Laws -
- Treasurer -
- Tax Collection -
- Zoning -
- Nominating -
- Building - garage rental update, floor in conference room
- Waterfront -
- Office Manager -
- Other Issues

4) Old Business – TBD

5) New Business – TBD

6) Public Comments

7) Adjournment.

Meeting ID: 820 2689 0709

Passcode: 838859

[Join Zoom Meeting HERE](#)

Matt Barez
President, POA Executive Board



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Pine Orchard Association
Board Meeting Minutes
March 2, 2026

Attendees: Kerri Beckert, Matt Barez (virtual), George O'Dowd, Andrew Ruff, Niall Ferguson, Thomas Roche, Richard Greenalch, jr., Peter Robinson, Office Manager

Absent: David Silverstone, David Scheer, Karen Jubanyik, Vincent Giordano.

1. Call to Order

The meeting was called to order at 7:04 pm by Matt Barez.

George O'Dowd made a motion to approve the minutes from January 2026 meeting. Richard Greenalch seconded. Minutes were approved unanimously.

2. Committee Reports

A. Bylaws

- No activity reported for the current fiscal year.

B. Treasurer's Report (George)

- Tax collection and revenue are nearly 100% complete.
- Rental income shortfall expected due to vacancy.
- Building and permit fee revenue low but expected to rise in spring.
- CDs contributed approximately \$1,500 additional income.
- Funds transferred from legal to shorefront maintenance for stair repairs on Chapel Access. About half of the cost has been paid, and the remainder will be paid when installed. Approximate total is \$12,000.
- Utilities, office, insurance, zoning costs on schedule.
- About \$8,000 remains in building maintenance.
- Legal budget has about \$10,000 remaining.

C. Zoning

- Two recent permits issued (addition, pool). A new permit for a breezeway received today.
- Discussion on subdivision history, structure linkage, and zoning implications.

D. Nominating Committee

- Open house scheduled for Thursday at 6:30 PM.
- Several new candidates have expressed interest.

E. Building & Grounds

- One nonprofit tenant remains interested; another inquiry recently received.
- New mailbox installed after plow damage.
- Floor repair issue was discussed extensively (see New Business).

F. Office Manager's Report (Peter)

- Mailbox replaced and receipt submitted.
- Hard drive added to improve backup redundancy.
- General office operations running normally.

3. Waterfront

No report; representatives absent. New stair construction is under contract.

4. Old Business

Whibley Short Term Rental case awaiting new court date near end of March.

5. New Business

A. Floor Repair Dispute

The Board discussed the failed floor installation from July 2023. The contractor cleaned and waxed the floor and issued a \$3,000 bill. Due to prior conversation, it was the impression of the POA that the repair work would be gratis; Contractor stated that they “ would make it right.” Before repairing the floor, they proposed a \$15,000 replacement, raising concerns. The Board agreed not to pay the bill at this time and tabled the matter pending further review. A motion was made by Kerri Beckert to table further discussion until the next meeting until more facts could be gathered. Richard Greenalch, jr. Seconded the motion. Motion was carried unanimously.

6. Public Comment

A resident raised concerns about damage from town snow removal equipment to a board member about the use of heavy equipment by the town to move snow. The Board clarified that snow removal is performed by the Town of Branford and referred residents to the RTM representative or DPW.

7. Adjournment

A motion to adjourn was made by Thomas Roche and seconded by George O'Dowd. Motion carried unanimously. The meeting was adjourned at 8:07

Respectfully Submitted,

Kerri Costigan Beckert, Clerk
Pine Orchard Association

Pine Orchard Association Treasurer's Budget Report March 2, 2026
Current Approved Budget vs. Expenditure Activity YTD
as of 2/28/26

	Approved Budget FY 25/26	Budget Activity YTD	\$ Remain. Budget	% Remain. Budget
RECEIPTS				
Tax Collections	\$ 105,867	\$ 105,097	\$ 770	1%
Rent	\$ 5,200	\$ 2,800	\$ 2,400	46%
Building & Permit Fees	\$ 5,000	\$ 1,925	\$ 3,075	62%
Other Income (Int., Books)	\$ 43	\$ 1,679	\$ (1,636)	-3805%
Use of Funds/Savings	\$ 29,590	\$ -	\$ 29,590	100%
Total	\$ 145,700	\$ 111,502	\$ 34,198	23%
DISBURSEMENTS				
Security	\$ -	\$ -	\$ -	-
Shorefront Maintenance	\$ 74,000	\$ 64,622	\$ 9,378	13%
Building Maint/Utilities	\$ 15,000	\$ 6,664	\$ 8,336	56%
Property Improvements	\$ -	\$ -	\$ -	-
Office/General	\$ 18,000	\$ 15,945	\$ 2,055	11%
Insurance	\$ 7,800	\$ 5,780	\$ 2,021	26%
Legal	\$ 18,000	\$ 8,236	\$ 9,764	54%
Zoning	\$ 5,000	\$ 2,200	\$ 2,800	56%
PO Web	\$ -	\$ -	\$ -	0%
Ann. Acctg /Tax Software	\$ 4,400	\$ 2,930	\$ 1,470	33%
Beautification Com.	\$ 3,500	\$ -	\$ 3,500	100%
Sidewalks	\$ -	\$ -	\$ -	-
Total	\$ 145,700	\$ 106,377	\$ 39,323	27%
NET INCOME (LOSS)	\$ -	\$ 5,125	N/A	

Account Balances	
Bank of America	As of 2/28/26
Checking	\$35,126.68
Saving	\$20,006.87
7 month CD	\$40,978.36
12 month CD	\$40,937.78
BOA total balance	\$137,049.69

From: om@poa-ct.org
To: "Gene Bontatibus"
Cc: "vinnie giordano"
Subject: RE: fire house
Date: Tuesday, February 3, 2026 12:15:00 PM
Attachments: [2023-07-27 Bontatibus Floors \\$10,000.pdf](#)
[image001.png](#)

Gene,

This was not planned for and unexpected. Per your son's discussion with Vin and I at our meeting on January 23rd, it was indicated that the waxing of the floor would be done at no cost, given the \$10K paid for the original install just two years ago (see attached invoice).

Pine Orchard is a Town office, before any fee-based work is approved, a quote must be received. It was not.

To address your two issues noted in your email

1. We keep the room at 50 DEG in the winter. The issue with the adhesive oozing through the cracks of the tile occurred in the Spring, when the room sits at 65 DEG.
2. The material you cleaned-up off the floor was the dried glue. We clean mop the downstairs quarterly.

In summary, we (The POA) did not agree to pay Bontatibus Floors to perform the stated work. No written quote was received or approved. Your son indicated to Vin and I that the stated work would likely be done no cost. Again, we received no direct response or did we receive a quote. You proceeded with the cleaning/waxing at your own risk.

If you wish to dispute this statement, please reply. Otherwise, we consider the matter closed.

Peter Robinson
Office Manager
Cell: +1(203)215-9560



PINE ORCHARD ASSOCIATION
Branford Connecticut

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From: Gene Bontatibus <floorsgb@gmail.com>

Sent: Monday, February 2, 2026 3:51 PM

To: Pine_Orchard <om@poa-ct.org>; vinnie giordano <vsg@giordano.build>

Subject: fire house

peter, vin,

your invoice for work done last week

you must fix the heat downstairs and not turn it off or you will lose that floor. i know some moisture is coming thru the concrete but the real damage is the cold and condensation.

i would suggest you get some one in the cleaning business to come in once a month or every two mts.

if the floor shrinks a little the dirt get in the space you will have black lines and more area for water to get in between the tile and now you have the condition we just fixed

i am trying to find some maintenance folders from Shaw for you call me if you want more info or have any question
gene 203-996-2152

Bontatibus Floors LLC
 170 FORT PATH RD
 UNIT # 8
 MADISON CT 06443

Phone 203-245-2191

Invoice

Date 7/27/2023
 Invoice # 12309

Bill To
 PINE ORCHARD ASSOCIATION
 180 PINE ORCHARD RD
 BRANFORD CT 06405

Ship To
 PINE ORCHARD ASSOCIATION
 180 PINE ORCHARD RD
 BRANFORD, CT 06405
 PETER ROBINSON 203-215-9560
 VIN GIORDANO 203-410-4428

P.O. No.	Terms	Rep	Ship Date	Via	FOB	Project
VINNIE	CUSTOM	GENE	7/27/2023			

Description	Qty	Rate	Amount
1ST FLOOR MAIN LEVEL OFFICE FROM STREET LARGE OFFICE/ PRIME 0616V-00509 WASHED OAK 4" COVE BASE CARPET TILE	51	35.00	1,785.00
PREP WORK GO TO BE VERY HARD RIP UP/DOUBLE GLUE DOWN	36	4.00	144.00
5 MEN /		920.00	920.00
CARPET Tile			

Total	\$2,849.00
Pymnts/Credits	\$0.00
Balance Due	\$2,849.00 \$2,000

PLEASE SEND CHECK TO
 BONTATIBUS FLOORS
 36 ROSE ST UNIT 409
 BRANFORD CT 06405

Bontatibus Floors LLC
 170 FORT PATH RD
 UNIT # 8
 MADISON CT 06443

Phone 203-245-2191

Invoice

Date 7/27/2023
 Invoice # 12309A

Bill To
 PINE ORCHARD ASSOCIATION
 180 PINE ORCHARD RD
 BRANFORD CT 06405

Ship To
 PINE ORCHARD ASSOCIATION
 180 PINE ORCHARD RD
 BRANFORD, CT 06405
 PETER ROBINSON 203-215-9560
 VIN GIORDANO 203-410-4428

P.O. No.	Terms	Rep	Ship Date	Via	FOB	Project
VINNIE	CUSTOM	GENE	7/27/2023			

Description	Qty	Rate	Amount
BASEMENT HALL, CONFERENCE ROOM, AND BATH ROOM PRIME 0616V-00509 WASHED OAK	790	8.00	6,320.00
REMOVE BOWL AND RESET WITH NEW RING 40 1/4 NEEDED OR COVE BASE 2 VINYL REDUCER	40	100.00 4.00	100.00 160.00
RIP UP AND REMOVE DOUBLE GLUE DOWN (GOING TO BE VERY HARD)		1,570.00	1,570.00

Total	\$8,150.00
Pymnts/Credits	\$0.00
Balance Due	\$8,150.00

\$8,000

PLEASE SEND CHECK TO
 BONTATIBUS FLOORS
 36 ROSE ST UNIT 409
 BRANFORD CT 06405

Bontatibus Floors LLC

170 FORT PATH RD
UNIT # 8
MADISON CT 06443

Invoice

Invoice #: 14717
Invoice Date: 12/12/2025
Due Date: 12/12/2025
Case:
P.O. Number: PETER

Bill To:

PINE ORCHARD ASSOCIATION
180 PINE ORCHARD RD
BRANFORD CT 06405

Description	Hours/Qty	Rate	Amount
PETER 203-215-9560-/// 203-488-5180 BASEMENT HALL, OFFICE, BATH			
PREP RIP UP AND REMOVE EXISTING FLOOR COVERING CLEAN CONCRETE SCRAPE , SAND , PREP, REMOVE AND THEN REINSTALL WHEN FLOOR IS COMPLETE 2 PART SEALER APPLY TO CONCRETE TOTAL PREPWORK SUPPLIES AND LABOR		5,500.00	5,500.00
#5417V ORGANIC STRUCTURE	97	82.00	7,954.00
HEAT WELDING ALL SEAMS	110	20.00	2,200.00

please send check
BONTATIBUS FLOORS 36 ROSE ST UNIT 409 BRANFORD 06405

Total	\$15,654.00
Payments/Credits	\$0.00
Balance Due	\$15,654.00

OM@POA-CT.org



Pine Orchard Association

Office Manager Procedures Document

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II. Revision Log

Date of revision	Description	Revised by
2026-02-01	Reformat with MS Word and added index	PDR

1. Office Manager job description

The office manager's job is a multi-faceted position requiring an individual with a wide range of technical, social and management skills. **Technically:** they need to be proficient in office automation and related software. **Socially:** they need to be able to work with a wide range of personality types.

Management: they need to be creative in problem solving, strong work ethic, able to work with little to no supervision and with accountability to the POA Executive Board.

1.1. Collection of Taxes:

1. *An understanding of finance and proper accounting procedures.*
2. *Knowledgeable with accounting SW such as QDS (training provided).*
3. *Knowledgeable in POA tax procedure and enforcement (fully documented).*
4. *Knowledgeable in remote bank deposits and logging of said deposits (training provided).*
5. *Build rapport with Branford's assessor's office and learn to file property liens.*
6. *Computer literate in remote server access, Windows, and Office 365.*
7. *Generate all requested financial reports for the treasure and tax collector.*
8. *Understand how to reach out to delinquent taxpayers to collect outstanding taxes in a timely manner.*

1.2. Management of POA Web Site:

The POA website (www.poa-ct.org) is based on WordPress™. The Office Manager is the only person within the POA who edits site content. As such, the Office Manager needs to be knowledgeable in WordPress™ and HTML and familiar with the layout of the site.

1.3. Record Keeping

1. All POA correspondence and property ownership details, including contact information, are stored in Outlook and must remain confidential. Update the Outlook POA dataset weekly. Log every POA resident interaction and attach relevant documents in the "Notes" field.

1.3.1. Cloud-based documentation:

- All POA internal and public documentation are accessible as a PDF document in a Microsoft 365 cloud account.

Backups are maintained:

- In the cloud,
- On the local Office PC
- On an external backup drive. All documents, bills, correspondences and legal documents are scanned, converted to PDF and filed as they are received.

1.4. Outreach (Email, Constant Contact and Postcards):

There are three established methods for communicating to the residences of Pine Orchard. All three must be maintained regularly. They are:

1.4.1. Outlook Email:

Covers 66% of all Pine Orchard Residence (~454).

Pine Orchard South: *District 5* (328 properties). We have 69% coverage (~80 missing)

Sunset Hill Neighborhoods: *District 4*. We have (126 properties) – 43% coverage (~70 missing)

1.4.2. Constant Contact

Constant Contact is a digital marketing platform specialized for email marketing, automation, SMS, and social media.

1.4.3. Postcard direct mailing

Leveraging the POA Outlook address database, postcards can be printed and mail to residences.

1.5. Office Management Responsibilities

1.5.1. Zoning:

Zoning: Coordinating with the Zoning Enforcement Officer (ZEO) regarding questions and permits. Supporting the Planning and Zoning commissioner.

Zoning Filing: Maintain a physical and PDF copy of all zoning documents and prints.

Zoning Board of Appeals (ZBA): The OM will support the ZBA Secretary to address all appeal filing and planning requests. All appeals filed are logged, scanned, and filed. The documents are then sent to the ZBA for action. The Office Manager then supports the ZBA with:

- **Scheduling** the ZBA meeting and ensuring the room is heated clean and neat for the appeal meeting.
- **File** Legal Notices with:
 - ✓ Local Paper
 - ✓ The ZBA
 - ✓ The plaintiff
 - ✓ The plaintiff's attorney
- **Notify** the person making the appeal and their attorney of the documents and notices that must be sent and acknowledged prior to the hearing.
- **File** the ruling with the town. Once filed, notify the plaintiff of the filing

1.5.2. Payment of bills:

All bills and receipts are converted to PDF and files in the MS 365 cloud account. Every Friday, the unpaid bills are delivered to the treasure for payment. All bill must be maintained for five years and accessible for audit as required by the treasurer.

1.5.3. Federal and State filings:

Work with the POA Board to ensure all state and federal annual filings are executed on time and filed.

1.5.4. Address on correspondence

Reply to all POA inquiries within 24 hours. If no answer or resolution can be found. Engage board members for support to answer/resolve issues.

1.5.5. Community Outreach Program

Support the POA Board and the Union Chapel with outreach requests

1.5.6. Building maintenance:

Continually look for ways to reduce costs. Submit all suggestions to the Building Board member for approval. Source material required and installation. Track and report work to Board.

Keep the building interior clean. Vacuum floors, dust, remove cobwebs before all public meetings. Supervise the maintenance of the grounds, lawn maintenance, snow removal. Manually remove ice and snow inhibiting safe building access. Any work that needs to be done is submitted to the Building Board member. Quotes are solicited in triplicate and submitted to the POA Board for vendor selection and approval.

2. Property Tax Collection Overview

2.1.QDS Tax Software

The POA (and the town of Branford) rely on the Billing & Tax Collection cloud-based application offered by Quality Data Service Inc. (QDS), to issue tax bills and track all tax payments. QDS (the company) is based in Waterbury CT. The accounting/tracking software is hosted on a remote server with no tax data maintained on any local client.

2.1.1. QDS Accessed from local clients:

The QDS server is accessed via a script file which resides on the desktop labeled "QDS_TaxCT". When the icon associated with the script file is clicked on, a window will appear "RemoteApp security warning" click on Connect and enter in the user Name and Password as noted in the text file **AAA POA data_DO_NOT_DELETE.txt** on the home page of POA OneDrive.

2.1.2. QDS Two-factor Authentication

Once the QDS screen appears, you will need to authenticate access using two-step verification via the DUO smartphone application. Contact QDS agent for assistance with app installation and desktop icon setup.

2.2.Tax Timeline and Procedures

The following timeline adheres to the POA Charter, State Law, and Branford Tax Collection.

2.2.1. Tax rate calculated from Town Assessment Information:

Pine Orchard taxes are based on property assessments provided by the Town of Branford, effective October 1st of the current year. Office Manager should email the Branford Tax Collector to obtain an Excel copy of District 5 assessment and send the information to the POA Tax Collector so he/she can present a range of tax rates and projected revenue to the POA Executive Board in May.

2.2.2. Set POA Property TAX rate for current fiscal year

The POA Executive Board sets the mill rate for the upcoming fiscal year (July 1st to June 30th) during the May *Executive Board Meeting*. Once the tax rate is set, it is approved by the POA Tax Collector and POA Clerk and communicated to Town of Branford Tax Collector and to QDS for the printing of the upcoming tax bills.

2.2.3. QDS Notification:

QDS requires a copy of the signed Mill Rate letter from the POA Tax Collector before processing the tax bills for printing.

- Email scanned copy to: taxsupport@qds.biz
- Or fax to 203-574-4360

2.2.4. Envelope Inventory:

Check inventory of windowed envelopes to ensure enough (~450 needed). If needed, order 2,000 envelopes from Eric Hyland at ehyland@qds.biz (~\$35 per thousand)

2.2.5. Legal Notice Publication of POA Tax rate

Legal notices must be published on or about May 30th and June 30th in the Branford Review/Shoreline Times. Note that legal notices are only published on Thursdays. The notice must be emailed to the publisher no later than the Tuesday before the May 30th publish date. Below is an example of a notice.

TOWN OF BRANFORD TAXPAYERS

Notice is hereby given to the taxpayers of Pine Orchard District 5, resident and non-resident, that the tax is due July 1, 20__.

Tax payments should be made payable to the Pine Orchard Association and may be mailed to:

**The Pine Orchard Association
180 Pine Orchard Road
Branford, CT 06405**

Taxpayers who have not received a bill by July 1 should contact the Pine Orchard Office by email at om@poa-ct.org or by phone or mail for a duplicate bill, since failure to receive a bill does not invalidate the tax and respective penalties should the account become delinquent.

Unpaid taxes not in our mailbox at 180 Pine Orchard Road by August 1, 20__ will be considered delinquent. On that date, interest will be charged from the original due date of July 1, 20__ with a minimum charge of \$TBD. Interest is charged at a rate of 9% per year in accordance with the Charter.

2.3. QDS End of Year Procedure

On or before May 30th the previous year *QDS tax data* needs to be closed out, and the current tax year data loaded into the QDS system. When the year closes, note that the current year is the tax year and the previous year is the grand list year.

2.3.1. Year-End QDS Checklist

This section describes how to close the QDS books for the previous year. This task is typically completed in early May but no later than June 30th.

Prerequisites:

Close/post all batches (only necessary if unpaid taxes remain) If all taxes are collected (paid in full), batches are already posted

2.3.2. Run the required QDS Reports

Run the following Year-to-Date reports before June 30th and save as PDF documents for auditors:

- Open Balance Report (from Credit/Delinquent Reports)
- Grand Rate book Balance Sheet - For Active and Suspense
- Year-to-Date Daily Cash Report (Totals Only)
- Year-to-Date Adjustment Report (Totals Only)
- Year-to-Date Refund Report (Totals Only)
- Year-to-Date Bounced Check Report (Totals Only)
- Year-to-Date Payment Transfer Report (Totals Only)

2.3.3. Closing the Books

Important Reminder: Before mailing bills for the current year, pull all Yowago bills which require partial payment adjustments. These must be adjusted down, printed separately, and then mailed.

2.3.4. Archive or Save QDS Reports

If all taxes have been received, archive everything up to the grand list year. If taxes remain outstanding, print audit reports as PDF and save to POA Documents/PDF library/QDS & Tax Collection folder with year designation. That should be followed by a request to back up the previous year's tax dataset.

2.3.5. Submit Final Posted Rate Book Transmittal to QDS

At this point, the office manager will submit the Final Posted Rate Book Transmittal form for the current October 1st assessment to QDS. The form can be request from QDS by Emailing said request to icrudele@qds.biz and taxbill@qds.biz

2.3.6. Close Out Year

2.4. Follow the procedures outlined in the "QDS End of Year Procedures" document

2.4.1. Enter Current Year Mill Rate

Navigate to: ->System -> Housekeeping ->Mill Rate Maintenance, TOWN = current mill rate
This step is required before entering new transactions.

Note: The Assessor's office in Branford will transmit the required BAA/COC totals to QDS. The POA Office Manager does not do this because the Town of Branford also uses QDS, and QDS will extract the district 5 assessment data directly.

2.4.2. June: Tax Bill Processing and Mailing

Taxpayer bills must be physically mailed no later than 10 days after July 15th of the current year as outlined in the POA Charter. The POA sends out tax bills on or about June 15th to be consistent with the Town of Branford (which mails between June 15th and July 1st).

2.4.3. Printed POA tax bills

Tax bills are printed by QDS and ready to ship within 10 days after receiving the Final Posted Rate Book Transmittal form. Office Manager should instruct QDS office in Waterbury to ship bills to a home address, not the POA office. Instruct QDS to sort/print the tax bills in numerical (property ID#) order not alphabetically by name.

2.4.4. Tax Bill Processing Steps:

2.4.4.1. Extract Yowago Drive Partial Payments:

- Remove bills associated with the seven (7) noted Yowago Drive properties from the billing packet. Edit with the correct tax payment based on the percentage on file within the address files in Outlook.

2.4.4.2. QDS Adjustment Process for Yowago

Login Credentials:

Log onto QDS system as ADJUST/ADJUST (NOT TAX1/TAX1)

This prevents affecting the TAX1/TAX1 sequence numbers when posting the batch

Process Overview:

Adjust the tax value and then post the transaction.

- **Step-by-Step Procedure:**
- **List all properties with partial tax payments:** Note percentages and account numbers (as shown in table above)
- **Calculate adjustment amount:** Multiply the tax rate for the property by the percentage Subtract result from current tax rate This value is the adjustment amount
- **Enter the modification value into QDS:**
- **Posting, Enter Transaction:** Under Transaction Type, click arrow and select "Adjustment" Enter Tax ID number format, press Enter Click the O/R box (to the right) Enter adjustment value (e.g., if Bill = \$174.44 and should be \$106.41, then adjustment = \$68.03), press Enter Set Inc/Dec to "DEC" Select Adjustment Code of "02-RE"
- **Post transaction:** (F11) only, then enter next Tax ID number. After all partial properties are entered: Posting, Post Start New Batch, Post Batch (F11)
- **Exit QDS:** Log back in as TAX1/TAX1
- **Example: For a 5-mill tax rate (2023)**

TAX ID	Address	Percent In POA	Tax Rate	Paid	Adjust
3596	30	28.00%	\$237.15	\$66.40	\$170.75
1396	39	74.00%	\$200.80	\$148.59	\$52.21
3645	41	40.00%	\$198.00	\$79.20	\$118.80
6588	45	37.00%	\$209.20	\$77.40	\$131.80
9505	51	61.00%	\$218.05	\$133.01	\$85.04
1310	55	85.00%	\$261.70	\$222.45	\$39.26
5256	56	1.00%	\$376.60	\$3.77	\$372.83
TOTALS			\$1,701.50	\$730.82	\$970.68

2.4.4.3. Remove Duplicate Addresses and mail

- **Extract and mail** separately any duplicate address bills Examples: POYCC and POA residences that pay for multiple properties.
- **Deliver to TYCO Branford:** Deliver remaining bills to TYCO Branford with three hundred (300) windowed envelopes and stamps for mailing, stuffing and posting. This must be completed on or before June 15th.

2.4.5. Tax Collector Schedule:

In addition to the published tax notice, it is suggested that the Office Manager send an email to all District 5 property owners, on or about July 1st, notifying them:

- That tax bills have been mailed
- Taxes payments received after Aug 1st are considered delinquent and subject to a fine
- If they have not received a tax bill by July 1st, email the office manager

2.4.5.1. August: Delinquency Processing

Delinquency Date: August 1st (30 days + 1 from July 1st due date)

Actions Required:

- Print a second bill for all delinquent accounts
- Mail the second bill
- Send follow-up email notifying payee of delinquency

2.4.5.2. Monthly Follow-Up:

First week of each month thereafter: Office Manager sends out new bills indicating amount due and penalties/interest. Sending an accompanying email is strongly suggested

2.4.5.3. November: Demand Notices

On the First Week of November, the Office Manager emails the Tax Collector Chair with a list of POA residences still delinquent. Permission is then request to send a **Demand Notice**. Once permission is received, send Demand Notice requesting payment within 10 days

Template Location: POA Documents/Word/TAXES folder

2.4.5.4. Follow-Up Actions:

If no payment is received 10 days after Demand Notice:

- Call the delinquent party
- Send email reminder
- If necessary, schedule meeting with Tax Collector Chair

2.4.5.5. February: Final Notice

After 90 Days of Delinquency, the Office Manager requests permission from Tax Collector Chair to send a registered letter (return receipt requested) of FINAL NOTICE.

2.4.5.6. April: Property Liens

If payment is not received by April 1st, the Office Manager requests permission from Tax Collector Chair to impose a lien on the property in question at Town Hall.

3 QDS data entry process/tasks

Login: Use credentials TAX1/TAX1

3.1. STEP 1: Enter Transaction

- Click Postings, Enter Transaction
 - Verify the Effective Date and Posting Date
 - Enter Bill Number (ignore leading zeroes), press Enter
 - Press F2 - populates the amount field
 - Press F11 - adds receipt to batch
 - Press F10 - logs the value
 - Press F2 again - finalizes the entry
 - Press F11 again - ends the process
- ✓ **Process Sequence:** F2 -> F11 -> F10 -> F2 -> F11

3.2. STEP 2: Print Modify Transaction Report

After entering all payments for the batch:

- Posting, Print/Modify Transaction, F11 (print)
- This prints a physical copy of the ledger before posting
- Review all entries for accuracy

If Correction Needed: you will need to select VOID PAYMENT

- Enter record number for the record in question, press Enter
- Enter dollar amount to subtract or void (F2 will not work)
- Record the transaction: F11, F10, F2, F11
- If you remove a duplicate, no further action is needed
- If you adjust an entry, you must re-enter it correctly

3.3. STEP 3: Post the Current Batch

- Posting, Post - Start New Batch
- Print the Batch Report
- Check it against the Modify Transaction Report - totals must match

Note: Each batch has a unique batch number under TAX1/TAX1 login.

3.4. STEP 4: Deposit Checks to POA Bank of America Account

All checks are scanned and deposited into the POA-BoA account via check scanner and BoA application.

Procedure:

- Open browser and click on BoA icon in toolbar
- Username and password should auto-populate (if not, credentials are in AAA POA data file in cloud account)
- Under Business Services, click "Scan checks to deposit"
- Enter description: "POA TAXES BATCH #" plus deposit amount from batch report
- Verify each check amount against the Modify Transaction Report
- When finished, finalize the deposit

Print two (2) deposit reports: File one with batch documents, send other to Treasurer in weekly envelope

3.5. Printing Delinquent Bills at End of Month

At the end of each month, print and mail all delinquent bills. QDS automates this process.

Procedure:

- Under Maintenance, verify the month is set for the month you're printing bills for
- Reports, Delinquent Statements
- Screen should populate with correct data - check dates
- Print and mail only the two (2) top slips

3.6. Updating Tax Mailing Address

Procedure:

- Maintenance, File Maintenance, Modify Entire Records
- At bottom of screen, enter bill number, F10 (fill in fields)
- Under General Data, update new address
- Press F11 to save

3.7. Assigning a New Owner

Procedure:

- Maintenance, File Maintenance, Transfers
- Enter record number, F11 (find)
- Enter new owner's name and address under New Owner Information
- When done, F11 to save

3.8. Writing Off Small Balances

Login: Use ADJUST/ADJUST

Procedure:

- Postings, Write off small balances
- Set adjustment code to "CR BAL UNDER %.00"
- Leave Year blank (for all years)
- Leave Bill Number blank (for all bills)
- Under Options, change to -\$5.00 to \$5.00
- Click Search [F9] to see all records
- Click the "All Records" box in the Flags section
- Click Write and Print [F11] - field will go blank
- Post The Batch [F5]
- Print batch report and file

4. Communications and Outreach

4.1. File Naming Conventions

All files saved should follow this syntax within the Microsoft OneDrive cloud account:

- **Format:** YYYY-MM-DD Description
- **Example:** 2019-03-22 Letter from Sanders to Payne.pdf

This syntax is required so when searching files within Windows Explorer, they will list chronologically.

4.2. Communication Methods

There are two established methods for communicating with Pine Orchard residents:

4.2.1. Email Blast via Constant Contact

- Coverage: ~70% of all Pine Orchard residences (452 total)
- Pine Orchard South (328 properties): 69% coverage (80 missing)
- Sunset Hill Neighborhoods (124 properties): 43% coverage (70 missing)

4.2.2. Direct Mailing (postcards/letters)

- For residents without email addresses (~150)
- Pine Orchard South: 80 addresses (100% including seasonal/renters)
- Sunset Hill Neighborhoods: 70 addresses (91% coverage, 6 unknown)

4.2.2.1. Cost Analysis for mailing postcards:

- **Email:** Monthly fee paid to Constant Contact - No additional cost to POA
- **Postcard Mailing:** \$0.18 + \$0.35 stamp × ~150 addresses = \$79.50
- **Letter Mailing:** \$0.79 + \$0.50 stamp × ~150 = \$183.00

4.2.3. Procedures to send notice to POA

Submission: All requests for outreach should be sent to the Office Manager.

Required Information:

- **Method for outreach:** Email, Postcard, and/or Letter
- **Target area:** District 4 and/or 5 - can specify specific by street(s)

Approval Process:

- Request sent to the Chair (to whom content relates)
- Request sent to POA President for approval
- Both bodies must review and approve before communication is sent

4.2.4. Email Blast Procedure:

An example of approved content will be emailed to:

- The requesting Chair
- The President
- The Marketing Communications Chair

This ensures layout, format, and language are correct before sending it to the community.

4.2.5. Printing Address Labels (Avery 8460)

Procedure:

- Start Word and open a new blank document
- Mailings, Start Mail Merge, Labels
- Edit template for Avery 8460 with 0.6" top margin, click OK
- Select Recipients (page populates with Next Record)
- Select Address Block, choose third salutation option from top
- Deselect "Add Company Name", click OK
- Tighten line spacing: Double-click AddressBlock to highlight, Home, Paragraph icon, Line Spacing Options, Set line spacing to Exactly 9, click OK
- Mailings, Update Labels (propagates address block)
- Insert label stock face-up
- Finish and Merge, Print Document, OK

5. Microsoft OneDrive Structure

5.1. Audio/Video Files

Contains audio/video (Zoom) recordings of meetings:

- **By-Laws:** Zoom recordings from 13 meetings (April 13, 2022 - September 5, 2023)
- **Executive Board Meetings:** Zoom recordings starting May 4, 2020 (beginning of COVID)
- **POA History:** Audio narratives used in POA History video posted on YouTube
- **Sidewalk Meetings:** Zoom recording from October 28, 2020
- **ZBA:** Audio-only recordings of ZBA meetings listed by property address

5.2. Audit Files

Structure: Fiscal year directories (June to July) with monthly sub-folders

- **Monthly Sub-directories:**
- **Bank of America:** Bank statements for each month
- **Deposits:** Check images of all non-tax deposits for the month
- **Bills:** All bills received for the month

Important: Before end of fiscal year (June 30th), create new year of sub-directories using next year as template (copy and paste). Do not copy subdirectories with content to avoid deleting files.

5.3. POA Documents

Contains bulk of POA documents (both MS source and PDF).

Sub-directories:

- **Annual Meeting Doc** - Documents for annual meeting held first Monday in July (organized by year)
- **Excel** - Office Manager's weekly timesheet and covers, spreadsheet used for taxes
- **PowerPoint** - Presentations and graphics content used in POA
- **Pubs** - Quarterly newsletters
- **Word** - All POA Word documents with following sub-folders:
- **Correspondence:** Letters to association members
- **Email & Email Blasts:** Templates for email blasts and emails to members/vendors
- **Legal:** Contracts, statements of work, letters to attorneys
- **POA Documents:** Word source documents for Zoning Ordinance, By-Laws, Charter, forms, commonly used letters
- **QDS:** Procedures for using the software
- **Taxes:** Tax-related documents
- **Zoning:** Zoning documents, applications, procedures
- **Misc:** Documents not fitting other categories

5.4. PDF Library

All scanned documents are converted to PDF. Sub-directories include:

- Board Member CVs
- Building and General

- Finance & Taxes (budget reports, yearly financial statements, CT State Tax letters, Federal Tax Documents, Federal Tax filings by year, Town and State filings)
- Legal & Insurance (Beach Access, Breakwater, Crescent Bluff, Insurance by year and provider, POA Short-term rental, Union Chapel)
- Letters to Members
- Newsletters
- POA Documents (PDF versions of Charter, By-Laws, Zoning Ordinance, branding documents, address list by road)
- POA Meeting Minutes for all Committees (POA Improvement Association, POA Executive Board Minutes, POA Committee Minutes including STRC and Sidewalks, POA Agendas)
- QDS & Tax Collection (End of Year Reports)
- Zoning (ZBA minutes and notices, zoning forms and procedures)

5.5. Legacy Web Documents

Contains all legacy documents uploaded to previous website, listed by year. Includes folder with POA Anniversary images.

5.6. Pictures and Graphics

- **Concert Series** - Divided by performance, contains graphics for 3' x 2' posters and email announcements
- **Graphics** - Content for annual meeting, Sprint Tag sale, various programs, POA door sign
- **Logo and Signatures** - Source files for POA logo and scanned signatures
- **POA Pictures** - Pictures from 2017 used on website, historical pictures of Pine Orchard

5.7. Zoning Files

Contains all zoning files and prints for POA properties as of June 2017. As folders are pulled for POA residences, contents prior to 2017 are scanned and filed by street address.

5.8. Public

Contains Outlook PST file for all address records (POA_Outlook.pst). Temporary PST file for remote access from home office, refreshed by exporting POA Outlook dataset from POA office computer.

6. Office Administration

6.1. Weekly Reporting to Treasurer

Office Manager's Time Sheet is Submitted on Friday of each week and contains:

- Hours worked at approved fixed rate
- All charges made on POA Visa Card (so noted)
- Out-of-pocket CASH expenses incurred

All previous excel time sheets are located at - Excel/Weekly Time Sheet folder

Important: When using previous week's report as template, use "Save As" to avoid overwriting.

A **Cover Sheet** is attached to a 9" × 11" envelope which lists all contents. The envelope contains all receipts, deposits, bank statements, and expense statements delivered to Treasurer no later than 5PM Friday.

7. Preparation for Quarterly Executive Board Meetings

7.1. Office Manager Responsibilities:

The office manager will attend all Executive Board meetings

7.1.1. Report Preparation:

- Prepare report summarizing office business/activities for previous quarter
- Submit report to POA President three (3) days prior to meeting
- Distribute copies to board at meeting

7.1.2. Agenda Publication (Three days before meeting):

- Email to all POA residents
- Post to POA website (www.poa-ct.org) on home page under "Latest News"
- Display on bulletin board outside POA building

7.1.3. Example Agenda:

**PINE ORCHARD ASSOCIATION
EXECUTIVE BOARD MEETING NOTICE AND AGENDA
MONDAY, DATE and TIME via Zoom**

At the call of the President, The Pine Orchard Executive Board will hold its board meeting at the POA offices at 180 Pine Orchard Road and via Zoom. All are welcome to attend.

- 1. Call to order**
- 2. Approve minutes from previous Executive Board Meeting**
- 3. Public Comments**
- 4. Officers and Committee Reports**
- 5. Old Business**
- 6. New Business**
- 7. Public Comments**
- 8. Move to Executive Session (if needed)**
- 9. Public Comments**
- 10. Adjournment**

Public Comment Rules:

Individual public comments limited to 3 minutes
Individuals shall identify themselves by name and address
Public portion of meeting limited to 15 minutes total
Proper and respectful conduct expected from speakers

7.1.4. Post Meeting Documentation Management:

The Office Manager will ensure that documents, pictures and related printed material presented during a Board Meeting are scanned, stored (as PDF) and attached to the minutes. The consolidated PDF document will then be filed in the POA OneDrive under:

... *Documents/PDF Library/POA Meetings Minutes/POA Exec Board Minutes.*

8. Annual Executive Board Meeting

The POA Annual Meeting is scheduled for the first Monday of July. The meeting typically takes place at Union Chapel. During the May Executive Board Meeting, The Office Manager will confirm with the Board the location of the meeting a make arrangement to secure the location.

Structure: Two separate meetings - Annual meeting followed by regular quarterly meeting

Required Documents:

- Agenda - Published three days before meeting
- President's Letter - Outlines accomplishments to POA community
- Voting Ballot - To elect coming year's POA Board members
- Attendance Sheet - Physical printout of entire Outlook address dataset indexed by last name
- Town Notification - Office Manager must file with Town Clerk dates for all POA Executive Board meetings for upcoming year

9. Outreach to Pine Orchard Residences

9.1. New Members

The Office Manager Shall Monitoring Property Changes within Pine Orchard and note all changes of ownership in Outlook.

Sources to track ownership:

- Real estate section of Shoreline Times and Branford Review
- Zillow.com (properties for sale)
- Informed by members of the POA

Welcome Letter:

- When new family/owner moves into neighborhood, send welcome letter highlighting line requesting their email contact information. An example letter can be found on the POA OneDrive at *POA Documents/Word/POA Documents/New members letter.docx.*
- The Office Manager will log purchase date in Outlook-notes and add the email address to the Constant Contact address database.

9.2. Phone and Voicemail System

Provider: Frontier Communications (also provides high-speed internet via fiber)

Daily Check: Important to check voicemail weekly to ensure a quick turnaround on inquiries.

How to retrieve voice message at POA Office:

- Lift receiver and listen for a beeping noise (indicates messages)
- Dial *100
- Enter password: 180180#
- Follow voice prompts

How to retrieve voice messages remotely:

- Dial (203) 488-5180 from home phone or cell
- When you hear voice message, dial *100
- Enter 108180#
- Enter password: 180180#
- Follow voice prompts

9.3. Website Management

9.3.1. Hosting Information

- **Primary:** www.poa-ct.org
- **Alias:** www.pineorchardassociation.com
- **Hosting Provider:** www.hostgator.com
- **Annual fee:** ~\$120/year
- **Billing month:** November
- **Credentials Location:** POA OneDrive in the TEXT file AAA POA data DO NOT DELETE

9.3.2. WordPress Access

Login URL: <http://poa-ct.org/v1/wp-login.php> (with redirect parameters)

Quick Link: Available in Chrome browser menu: "Log in for POA-CT.org"

User Accounts: Currently one active user accounts under Peter Robinson - robipe51

10. Zoning and ZBA Administration

10.1.1. File Maintenance

Office Manager Responsibility: Maintain zoning file system consisting of hard copies of all documents, prints or photographs related to POA properties.

Filing Requirements:

- All new documents filed as physical paper copies in the Zoning file cabinets.
- Electronic PDF copies in POA OneDrive cloud account under " POA Zoning Files"
- Filed by street and street number

PDF Requirement: If prints are submitted without supporting PDF, Office Manager must contact architect to obtain PDF copy.

ZBA Support: Office Manager works with ZBA Secretary to ensure documents are filed, all notices sent, and meetings scheduled.

10.1.2. ZBA Procedure (Secretary View)

- Office Manager scans documents and creates physical and electronic files
- OM sends e-file to ZBA Secretary
- Secretary forwards e-file to ZBA members (cc to OM), suggests Monday 7PM hearing dates at least 20 days in future, asks for availability
- OM confirms availability of meeting room on suggested dates
- OM asks applicant about availability on suggested dates
- Once availability determined, Secretary selects hearing date and informs ZBA members and OM
- OM informs applicant
- OM reserves hearing room
- OM drafts legal notice and cover email to newspaper, sends to Secretary for approval
- OM sends approved legal notice to newspaper no later than noon Thursday 18 days before hearing date, requests publication on Thursday before hearing date and preceding Thursday
- OM drafts notification letters to applicant and POA Executive Board Clerk, plus notice to community for ZBA Secretary approval
- OM sends out approved documents
- OM provides physical file copies to POA Secretary and ZBA President

10.1.3. ZBA Procedure (Office Manager View)

Application Submission: When resident submits Zoning Ordinance Conformity application and is denied by ZEO, resident may appeal to POA-ZBA.

Application Package: Zoning Board of Appeals Application Form, \$275 fee, attachments

Upon Receipt, Office Manager:

- Deposit \$275 application check
- Create new sub-folder in OneDrive zoning folder (naming convention: YYYY-MM-DD ZBA DESCRIPTION)
- Create paper folder with same name
- Scan application form and supporting documents as PDF, save to new ZBA folder
- **Three copies required:** Filed in zoning filing cabinet, delivered to ZBA Secretary, delivered to ZBA President
- Email all forms, letters, and prints to ZBA Secretary

10.1.4. Hearing Notification Process

Once Hearing Date Determined, Office Manager prepares:

- **Notice for ZBA Meeting** - Distributed to plaintiff and attorney, ZEO, ZBA board, POA Clerk, Shoreline Publishing (no later than Thursday 20 days before hearing, published Thursday 11 days before and Thursday 4 days before), POA community via email
- **ZBA Instruction Letter** - Mailed and emailed to plaintiff and/or attorney, emailed to ZBA and ZEO, printed and filed in zoning cabinet

After Meeting Completion:

- Draft legal notice outlining ruling, forward to ZBA Secretary for approval

- **Upon approval, notice is:** Filed with Branford Town Clerk (\$70 filing fee - cash), sent to local paper for publication, posted to POA notice board, mailed to plaintiff and attorney, emailed to POA community

11.Outlook Usage

Outlook is the main file system utility for:

- Tracking all emails and correspondence related to POA
- Tracking contact information for POA members, businesses, and interested individuals
- Calendar events and schedules

11.1. Email Management

Email Hosting Services: Gmail and HostGator

11.2. Contact Management

Outlook maintains all contact information for POA members, businesses, and interested individuals.

11.3. Email Folder Structure

Inbox: All current incoming emails reside here. By month, moved to corresponding month folder. Only current month's emails are maintained in Inbox.

11.4. Archiving Process:

Before moving emails to month folder, evict previous year's emails from that month folder

Move previous year's emails to Year folder in POA_Outlook (POA local drive)

Sent Mail: Same protocol as Inbox. Exception: Email blasts moved immediately after sending to Email Blast folder.

Storage Management: All emails less than one year old are moved off IMAP server and saved locally in POA_Outlook.

12. Zoning Ordinance Amendments

In the event where it becomes necessary to amend the POA Zoning Ordinance, the following procedure is followed. *(for information purposes only – the POA Attorney sets the final procedure).*

12.1. Committee Formation

Committee Composition (4 members):

A committee is established consisting of two (2) members of POA Executive Board (Planning and Zoning Commissioner and By-Laws Chair) along with two (2) members from Zoning Board of Appeals

12.2. Committee Responsibilities:

Propose language change/alteration to POA Zoning Ordinance requires the input from the greater community.

- Get input from greater POA on proposed change/alteration
- Present agreed changes/alterations to POA Executive Board for vote

Important Rule: No discussion between committee members concerning the issue outside of properly noticed meetings.

12.3. Public Notice Requirements (Committee Level)

Legal Notice Schedule:

First Notice: No more than 15 or less than 10 days prior to hearing

Second Notice: More than 2 days prior to hearing

Notice Distribution: Town Clerk, POA Notice Board, POA Website, Email notice to POA, Newspaper (11 and 3 days prior to meeting)

Important: Published notices must be sent to newspaper the Tuesday prior to requested publishing date (Thursday).

12.4. Approval Process

Committee Conclusion: Committee-approved amendment sent to POA Executive Board to be voted on at next quarterly Executive Board meeting (at least 30 days, no later than 65 days from submission).

12.5. Legal Notice Schedule (Executive Board Level):

First Notice: No more than 65 days or less than 30 days prior to meeting

Second Notice: More than 2 days prior to meeting

Notice Distribution: Town Clerk (allows Town Planning and Zoning Committee to review), POA Notice Board, POA Website, Email notice to POA, Newspaper (30 and 2 days prior)

12.6. At POA Executive Board Meeting:

- Amendment read into minutes
- Public comment received
- If no objection from community, amendment voted on and approved

12.7. Publication and Filing

Notice of Decision must be:

- Published two times separated by one week.
- Posted on POA signpost
- Posted on the POA Website
- Filed in Clerk's office (both with the Town and POA Clerk)
- Noted in the Change Log in POA Zoning Ordinance ensures all updates and amendments are noted with date and description.

Effective Date Requirements:

- At least 3 days after posting on signpost
- At least 15 days after adoption

13.W-4 Applications

Vendor Requirement: Request W-4 application (SS# or EIN#) from all vendors providing services to POA greater than \$600 (in 2026 that changes to \$10,000).

Filing: Scan W-4 and file in Notes field within Outlook for the given record

Tax Submission: On or about January 15, email all W-4 forms to Treasurer for submission to CPA for tax preparation.

Report for Office Manager for Jan. and Feb. 2026

- 1) **POA Tax Collection:** Next action: May 2026 – communicate rate to town and QDS
- 2) **Zoning:** Defer to Thomas Roche
- 3) **Outreach:**
 - a. We have 76% coverage via email for all POA residents (510 emails).
 - b. Mailed out 545 postcards to association concerning Thursday Open House
 - c. I continue to get back to 90% of the POA inquiries within 24 hours.
 - d. Sent out 1 welcome letter this period.
- 4) **Building:**
 - a. Floor downstairs was cleaned and waxed by BONTATIBUS FLOORS LLC. They never provided a quote for work. Asking for \$2,000
 - b. Garage Rental – defer to Andrew Ruff
 - c. Wrote up an initial release of the Office Managers Operation Guide. I need volunteers to read through the doc to improve clarity.
 - d. Purchased an external HDD to backup the Microsoft Cloud and Outlook dataset.
- 5) **Community:**
 - a. Will continue to support the Union Chapel with email announcements of their 2026/27 events.
 - b. *Neighborhood Secure* webpage is up to date. No new activity since Nov. 6th, 2024.