Village Grande at English Mill Homeowners Association

PROCEDURE XXX Managing Trouble Report

Process/Procedure Owner: Board of Trustees

## Purpose

This procedure describes the process for managing paper and electronic Trouble Reports.

## Scope

This procedure applies to all VGEM Owners and Residents, applicable committees, the board, and site manager.

## Roles and Duties

**Submitter:** Submits an online request or prepares a paper form and submits it to Site Manager. Tracks the progress of their request by viewing the online database.

**Site Manager:** Receives paper landscaping forms, makes a copy, and places the forms in the landscaping inbox and website committee inbox. When an online landscaping request is received by the site manager, the site manager make a copy of landscaping requests and places it in the landscaping inbox.

Any non-landscaping requests are worked by the site manager to completion. The site manager updates the database weekly to capture the status and eventually closes the request.

**Landscape Committee:** Receives the paper landscaping forms or hardcopy report from and electronic from submission. Forward the landscaping defects to the landscaping contractor and track progress until work is completed.

**Website Committee:** Receive copies of the paper landscaping forms and enter the data into the online database. Attend landscaping status meeting an update the online database with the latest status.

**Board:** The board reviews all open items in the database prior to each open session meeting and reports on the reason for items that are open for more than 10 business days.

**Procedure for managing “Trouble Forms” (4/5/2025)**

1. ALL forms received by any means in the VGEM office, are to be triaged upon receipt by the office manager.
   1. Green (?) and Brown forms are triaged to the Landscape Committee (see below)
   2. ? Are other types of forms submitted on paper to the office?
2. Forms received on paper into the office
   1. Site manager makes a copy of green (and brown?) form and places one copy in folder for Landscape committee and one copy for Website committee.
   2. The Website Committee liaison regularly (? Frequency) picks the forms from the office and enters the information into the Quality Report Database. **WS:** we need to name this.
   3. A Landscape committee (LC)member regularly (? frequency) picks up forms from the office and starts the Landscape committee process
      1. Landscape committee member handles the issue if able.
      2. Landscape committee notifies the landscaper to resolve issue.
      3. If board intervention is required, the landscape committee forwards issue to the HOA board via office manager.
      4. Landscape committee member files all green forms in a binder.
         1. Reviews binder every two weeks and re-notifies landscaper (via a list of unresolved forms) if no follow up is received
         2. Landscape committee member notates progress on the green form.
         3. If there is continued lack of resolution (define timeframe?), the issue is forwarded to the HOA board via the office manager. **WS:** See the timeframe in the Roles and Duties.
      5. Once a resolution occurs, the Landscape Committee member notifies the homeowner.
      6. Each communication (Landscaper, office manager, homeowner) will be cc’d to the Website committee liaison.
      7. The Website Committee (or should this be office manager?) liaison will update the website Quality Report Database. **WS:** It should be the office manager after we get the process up and running and everyone is trained.
         1. Each file will be updated with a status as follows: Open, Accepted, Investigate, Closed, Defer, Reject, and Other. (? Define these terms so they are used consistently) **WS:** See definition section.
      8. At the end of each season, the Landscape Committee member gives all resolved forms to the office manager to file in the appropriate homeowner’s file.
3. Forms received via website
   1. Upon electronic submission of a Trouble Form, Emails acknowledging receipt are autogenerated to the homeowner, to the office manager, and to members of the Website committee.
   2. The office manager prints a copy of the form and places green and (?) brown form copies into the folder for pick up by the Landscape Committee member. The LC member proceeds as above.
   3. Online submission of a form auto populates the Quality Report database.
   4. As above, the Website Committee liaison will receive updates on the forms and enter the information into the Quality Report database.
4. Types of forms – need to explore other types of forms and expand procedure **WS:** Added roles and duties and attachments to explain this.
5. Accountability
   1. All submissions via the VGEM Website populate the Quality Report database. Within the database, there is an automatic count of days since submission.
   2. Monthly, at the HOA public meeting, a Website Committee member will report to the board (project database to illustrate) regarding the status of all open submissions.
   3. Work with the board to adopt rules for expected timeframes for completion . **WS:** See the new role for the Board.

## Definitions

The following status definitions are to be used when updating the status of the requests:

* **Open:** Request is submitted.
* **Accepted:** Request is accepted by responsible element, for example landscaping committee accepts the request or site manager accepts a non-landscaping request and they begin working / tracking it.
* **Investigate:** Request is being investigated and worked.
* **Closed:** Request is successfully completed. The closing reason must be provided.
* **Deferred:** Request is deferred pending larger action that is needed. The reason for the defer must be provided.
* **Reject:** Request is rejected. The reason for the reject must be provided.
* **Other:** This is an undefined status. The reason for the other status must be provided.

## Attachments

* Landscaping Green and Brown forms
* Online request submission: <https://www.vgem.org/mem/request.html>
  + Trees - Brown Form Quality Defect
  + Landscaping - Green Form Quality Defect
  + Other Quality Suggestions and Defects
    - Common Area
    - HOA Operations
  + Other Submissions
    - Suggestions
    - General Contact

## References

None

## Inquiries

Questions regarding this procedure should be directed to the Board of Trustees.