

Southwinds at the Moorings Association

New Unit Owners Welcome Team

Overview

The purpose of this document is to outline a new procedure for welcoming new unit owners to Southwinds.

Background

Over past years, residents and Board members have initiated a number of different approaches to welcoming new residents and helping them to meet other owners, learn the rules, and learn their way around the campus. These efforts have not been fully successful and have tended to fall off over time.

Keystone has consistently welcomed new owners after they arrive and has provided a binder complete with policies, rules, regulations, etc. The Property Manager explains the contents and offers further assistance. While that is an important service and we can expect that to continue, the Board feels that it needs to be augmented by more personal and comprehensive efforts by members of the community.

There are quite a few rules and recommendations that need to be understood early in the residency to avoid later problems. While they are all in the binder and on the website, a new owner in the middle of all the details of moving to a new home can easily be distracted and not inclined to take the time to absorb that information.

Concept

The Board of Directors has approved formation of a Southwinds Welcome Team that would take on the steps involved in helping new owners to learn about the community, its traditions, requirements, and, especially, its rules.

Therefore, the program consists of designating one or two people in each building who would make contact with new owners in advance, initially by email and then by telephone, offering to assist them as they go through moving in and getting settled.

Establishing contact before the new owner arrives should accomplish a less stressful preparation for moving in. And having someone nearby when they arrive to answer questions and point out important rules could be of substantial

comfort. This program would not be a part of the building captain structure, but it would be complementary with those objectives and would even involve some of the same members.

Details

Before approval of unit purchase applicants, the Board conducts research of applicants' backgrounds. This process involves searching on the Internet for basic information. It uses Google, LinkedIn, BeenVerified, and other open sources. No personal financial information is collected in this process.

A version of that information along with contact information from the application would be provided to the responsible team member as soon as Keystone learns that a sale has closed. Having background information about the new owner would enable a friendlier and more personal connection.

While the ideal structure of the team would include year-round residents, it has not been possible to achieve that ideal for every building. However, using electronic communications, the first contact and initial welcoming to Vero from a distance can be accomplished. Also, other team members who are on campus could assist, if necessary.

In several cases, the welcome team includes significant others.

When contacting new owners, the information documents that team members will highlight on the website or in the binder are as follows:

Living in Southwinds

Rules, Regulations, and Policies

Architectural Review Board

General Information

The team will reinforce Keystone's visit by demonstrating the easy availability of these documents on the website, emphasizing immediate items, such as the master key and access requirement, being aware of rules for renovations, policy on guests, and keeping addresses current so that mailings can be properly directed.