

Green Valley Foothills Townhouses IV

Documents Committee Annual Report, FY2023

Last spring, we moved our documents to Continental Storage on Whitehouse Canyon Road. This was done with Board approval after a survey of all local options to identify the “best bang for our dollar”. This facility provides improved security, lighting, cleanliness, and climate control. Many volunteers assisted with this project to pack, label, transport and unpack over 50 boxes of records.

We also found items in our former unit suitable for discarding, recycling, and re-use (road signs, metal fence posts, orange cones). The new unit continues to house our two metal 5-drawer file cabinets of records, along with plastic tubs of event supplies used by the Member Services Committee. It is not a “best practice” to store anything else with records, but we are more interested right now in economizing for the sake of our HOA’s budget, and in relieving the Member Services Committee of the burden of storing event supplies in their homes. Also, the smallest unit available has enough space for both needs.

There was a hiatus from May through November due to the Chair’s personal travel.

In December, Donna Anderson joined the Committee. She has a solid understanding of the importance of records from her background as a bank officer and co-owner of a small retail business. She is providing invaluable help to the Chair on what has long been a “committee of one”. Our first meeting was a teleconference with Mike Shupe from our HOA attorney’s office to seek his help with a list of required records and retention periods.

Early this month (February), Jackie Smith also joined our committee. As a long-time resident and someone who has served over the years on the Board and many Committees, she brings invaluable knowledge and experience to bear. She will also serve as our required Board Member per the Bylaws.

Having these new members means we are a full committee after years of heroic single-person efforts by Marilyn Kern, Carol Heller, Seija Snow, most recently Lynn Froysa, and likely many others the Chair is unaware of.

We are looking forward to a productive year as we provide training for the Board and Chairs, find a proper storage system for e-records, scan our existing hard-copy backlogs, and perform routine annual dispositions.

Respectfully submitted,

Kay Schardein, Chair
Donna Anderson, Member
Jackie Smith, Member