

Be Engaged. Be Informed. Be Heard.



HOMEOWNERS ASSOCIATION
OF TELLICO VILLAGE, INC

Your Voice in the Village

Today's Meeting is Being Recorded & Streamed Live

Available for playback on HOA Website-www.hoatv.org. CCTV is live streaming video to www.Tellicochurch.com.



Invocation

Rev. Devin Phillips

Pastor of Connections



The HOA extends a special thanks to the
Community Church at Tellico Village

Agenda

- **HOA – Ellen Fox & Linda Klein**
- ***TellicoLife* – Marsha Herzog**
- **POA – Winston Blazer, Bruce Johnson, Mitzi Lane & Parker Owen**
- **StayinTV – Dave Hudgens**
- **Public Library – Becky Haile**
- **Tellico Community Foundation – Joe Beyel**
- **Q&A**

2019 HOA Board

Executive Council

- President-Ellen Fox, VP Programs-Ken Litke,
- VP Membership-Jim Kelly, VP Social-Bill Bazil & Linda Farruggia
- VP Communications & Marketing-Annette Schmidt
- VP Technology-Marsha Herzog, Secretary-Lynda Narwold
- Treasurer-Linda Klein, Past President-Sue English-Kovar

Standing Committee Chairs

- Chair at Large-John Bologna, Relations Loudon Co-Gail Link
- Relations Monroe Co-Bob Brunetti
- Neighborhood Watch-Mark Kovar, Welcome Orientation- Susan Kimball

Liaisons to HOA

- New Villagers-Floyd Hunter, Stay in TV- Dave Hudgens, Library-Becky Haile



2018 HOA Financial Summary

Income		
	Membership Dues	\$25,120.29
	Social Activities	\$109,855.08
	Total Income	\$135,410.37
Expenses		
	Administrative	\$9,428.06
	Communications	\$2,216.83
	Membership	\$1,990.44
	Social Activities Disbursements	\$113,912.08
	Other	\$383.53
	Total Expenses	\$127,930.94
Net Income		\$7,479.43

2018 Accomplishments

- Renewing membership online w/credit card eliminates that volunteer time – thank you to the 96% who renewed that way!
- 127 different social events offered
- Successful advocacy by TDOT ad-hoc committee - 10 additions
- Local & State candidates speaking to us here
- Neighborhood Watch Program redesigned - email reach, Coffee with a Cop
- Surveys – Liquor store & LRPAC partnership
- Widened media presence - TVB, FB, general meeting access through live stream, radio broadcast, Vimeo, and HOA Website
- HOA joined the Lenoir City Committee of 100 (future advocacy)

2019 Goals

- Survey of *your* communication preferences and preferred activities open 3 more days – we want your input please
- Adding more social to our Socials
- Offering some larger events - EG Kight with 171 attendees
- Relevant GM's – update on POA Marketing & Cyber Security (March 14)
- Looking at additional ways to advocate for you: working with POA on improving communications on hot topics
- Highway ad-hoc committee taking over where TDOT ended
- HOA formed East Tennessee Bridge Project Ad Hoc Committee (future advocacy)
- Examine HOA volunteer roles to reduce/automate time required



www.tellicolife.org

Marsha Herzog
TellicoLife Business Lead

Our Vision



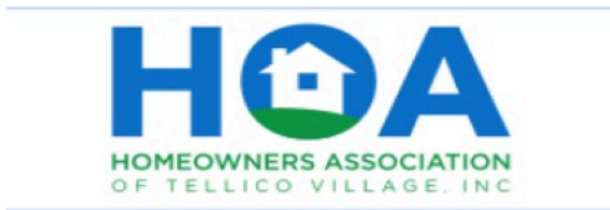
**... to become the one on-line place to go
for all activities/events
in Tellico Village**

www.tellicolife.org

History



- Founded in 2017 by ...



- Free to Individuals / Funded by participating Organizations
- Managed by Village Volunteers
- Content is open to all – sign in **not** required to view

2018 Year in Review



- **37** Clubs & Organizations
- **3,039** Households representing **5,587** Individuals

- **620** Events
- **1,259** Sessions / week (65,484 total)
- **6,167** Page Views / week (320,684 total)

- **94%** HOA Memberships paid by credit card



Illinois Club



ST. THOMAS



TV Hikers



2019 Focus



- Add 10-20 Clubs & Organizations
- Increase value to **individuals** through design & self service
- Increase value to **organizations** through design & reduced admin time
- Expand our leadership team



www.tellicolife.org

[Questions & Comments: info@tellicolife.org](mailto:info@tellicolife.org)



Bruce Johnson
POA President

Winston Blazer
General Manager

Mitzi Lane
Cont. Imp. & Special Projects Manager

Parker Owen
Chief Financial Officer



HOA Update - January 2019

- 2019 Goals & Challenges
 - 2018 Accomplishments
 - 2019 Areas of Interest/Challenges
 - Continuous Improvements
 - 2018 Long Range Planning Update
- POA Financing Challenges



HOA Update – 2018 Accomplishments

General Manager's 2018 Highlights

- CI- broke \$1 million amount
- Visitors- over 8000 visitors in the Welcome Center in 2018 which led to 238 total sales (tracked back to the Marketing Program), 3rd year in a row over 130 homes permits.
- 159 New Home Permits making a total of by 4317 12/31/18 (2/3 build out)



HOA Update – 2018 Accomplishments

General Manager's 2018 Highlights

- Trails, Paddle Board and Kayak Programs
- Toqua Clubhouse and Kahite Community Center- Approved
- Summit Medical Highlights
- Bridge & Highway 444- Combined HOA & POA Highway Committee



HOA Update – Areas of Interest (AOIs) for 2019

- Complete Construction of Toqua Clubhouse & Kahite Community Center
- Complete Renovations/Repairs at Wellness Center
- Update ACC Codes/Complete Restructuring of Bluebook
- Address Environmental Issues Associated with Village Growth



HOA Update – AOs for 2019

- Analyze Facilities/Space Requirements at Total Buildout
- Develop Communications Strategy
- Complete a Reserve Fund Study
- Develop Standard Non-Financial Indicators for use in Budget Formulation and Performance Measurement



HOA Update – AOs for 2019

- Streamline Application Process for BOD and Advisory Committee Candidacy
- Develop Strategy to Improve Relations with Local Leaders
- Develop and Implement a Village Political Education Program



HOA Update – Political Education Program

Did you know.....

- At approximately 8400 residents, we are larger than both Lenoir City and Loudon
- Estimated Household Expenditures in the Surrounding Area are Over \$86 Million per Year
- The Trickle-down Economic Impact to the Local Economy is Over \$600 Million



HOA Update – Political Education Program

Did you know.....

- There are Over 1000 People Employed Either Directly or Indirectly by the Village
- The Economic Impact of Building 156 New Homes per Year is Over \$56 Million
- The Annual Increase in Loudon County Tax Collections is over \$257,000 due to New Construction



HOA Update – Political Education Program

Did you know.....

- Villagers Pay Over \$7.6 Million to Loudon County for Property Taxes
- Villagers Pay a \$300,000 Facility Tax to Loudon County for Each New Home
- Villagers Receive Less than 2% of Taxes Paid in Annual Support from Loudon County



HOA Update – Political Education Program

Did you know.....

- Less than 1/4th of Villagers Vote in Local Elections



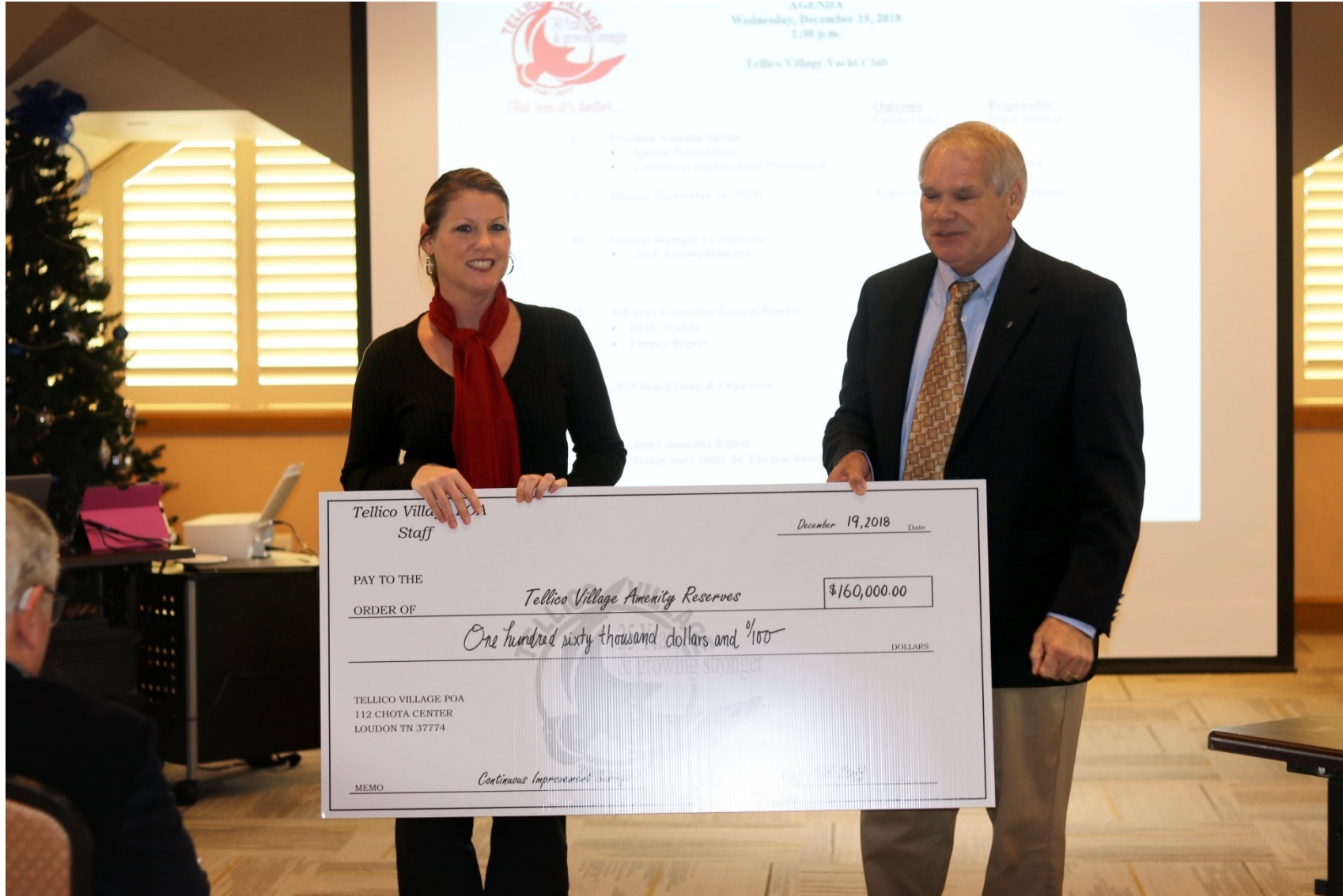
HOA Update – Political Education Program

It's Time.....That Villagers Become Proactive!

- To Assist, We Plan to Implement a Village Political Education Program
 - We Will Start by Forming a Political Education Committee
 - The Committee will be Charge With Keeping Villagers Aware of Governmental Decisions Affecting the Village



HOA Update – Continuous Improvement Program





HOA Update – Continuous Improvement Program

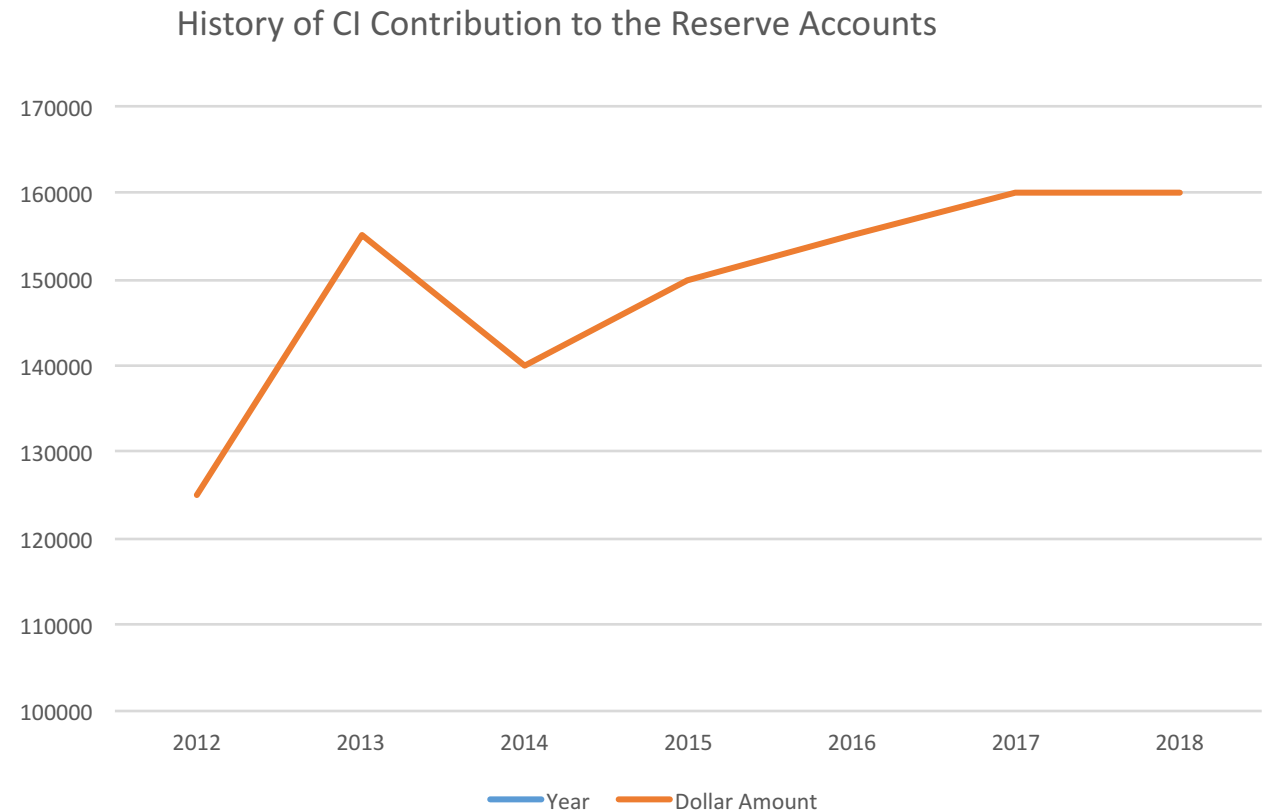
2018 Project Highlights

- Cloud-Based System on telephones for all POA facilities.
- Moved away from a fixed-rate insurance quote and plan to one that has a lower initial premium whereby we (POA) assume part of the risk of loss.



HOA Update – Continuous Improvement Program

2012	\$ 125,000.00
2013	\$ 155,000.00
2014	\$ 140,000.00
2015	\$ 150,000.00
2016	\$ 155,000.00
2017	\$ 160,000.00
2018	\$ 160,000.00
Total	\$ 1,045,000.00





HOA Update – Long Range Planning Update

- **Completed Long Range Strategic Plan Survey in August**
 - **40% of Tellico Village property owner households completed**
 - **The Top 5 Priorities were: Finances (#1 priority), Vision for the future of the Village, Growth, Recreational Amenities, and Aesthetics and Environment**
- **Focus groups were completed on January 19th**
 - **There were 10 focus groups conducted by experienced facilitators covering the top 5 priorities chosen by the Questionnaire participants**
- **Input from the Questionnaire and Focus Groups will be important elements in the Committee's Long Range Strategic Plan recommendations to the POA**
- **The Long Range Strategic Plan will be delivered to the POA Board of Directors in the 2nd Quarter 2019**



HOA Update – POA Financing Challenges

TVPOA Reserves Purpose, Sources and Plan

<u>Fund</u>	<u>2019 Budget</u>	<u>5 Year Plan</u>	<u>Beg./End 2019**</u>
• R&M	17.25% of NCA	20.75% of NCA*	\$772K/\$263K
• Amenity	4.5% of NCA	1.0% of NCA*	\$1,444K/\$ 18K
• Water/Sewer	~ 5.0% W/S User Fees + W/S Connection Fees		\$885K/\$954K
• Docks	16.25% Dock Fees + 8.25% PWC Fees		\$65K/\$61K
• Safety	0.0% of NCA		\$76K/\$78K
• TRDA	\$33K/month = \$400K/year		\$ 3K/\$ 7K

* NCA = Net Collectable Assessments, Excluding POA owned lots and after allowance for delinquent accounts

** Beg./End 2019 based on Board approved Budget, Nov. 14, 2018

NOTES: R&M Reserve drops in 2019 due to substantial road work and Wellness Center HVAC and repairs, then rebuilds over time.

Amenity Reserve drops in 2019 due to funding over 60% of new Clubhouse projects, then slowly rebuilds over time.



Dave Hudgens
HOA Liaison StayinTV

Hey, Tellico Villagers: Stay, don't go!





- **An aging in place project in Tellico Village**
- **Part of a national movement helping seniors**
live in their residence as long as possible
- **Identify changing needs and spearhead actions**
- **Volunteers do the work; donations keep us going**

STAYinTV Service Programs

- **Home Maintenance** – Minor home maintenance repairs
- **Rides** – Transportation to medical and other appointments
- **Groceries & Errands** – Grocery shopping and similar chores
- **Respite Care** – Giving long-term caregivers a break

STAYinTV Reference Materials

- **Resource Guide for seniors**
- **Planning for Lifestyle Changes Roadmap**

Both available on website: www.stayintv.org

- **Brochures on all programs available throughout Village**



Home Maintenance

- **About 40 volunteer handymen**
- **Average about 20 calls/month**
- **About 30% donate to STAYinTV**
- **Average donation about \$30**



Rides Program

- Provided 410 rides in 2018, more than double 2017
- 30 volunteer drivers registered
- More than 700 volunteer driver hours

Respite Care

- Giving long-term caregivers a break
- Reduce risk of client abuse
- Not geared toward patient, but rather caregiver
- Not just for caregiver appointments: Have some fun!
- Need male volunteers



Respite Care

Aging – Not so fun facts

- **By 2028, nearly half of Tellico Village over age 75**
- **By 75, 66% of women and 25% of men are widowed**
- **Cognitive impairment chance increases with age**
- **10% of people age 65 and older have Alzheimers**
- **Some 2/3 of Americans with Alzheimers are women**
- **Ages 75-85 – 45% had one or more disabilities**



Adult daytime assistance

Latest STAYinTV initiative: Adult daytime assistance

- **Patterned after CADES at Concord Methodist**
- **Caregiver delivers client**
- **Homey, sociable atmosphere**
- **Working with area churches**
- **Probably initially at Christ our Savior Lutheran**
- **Working title: “Our Place”**



Help us Help Neighbors

- **Volunteer -- Call (865) 458-7084 & leave message**
- **Help spread the word**
- **Be on the lookout for those needing help**



The Public Library at Tellico Village



Becky Haile

President Friends of the Tellico Village Library Inc.



The Public Library at Tellico Village 2018 Update

❖ **Opened 1987/2012**

❖ **Facilities**







The Public Library at Tellico Village 2018 Update

❖ Services provided

- ❖ Free eBooks
- ❖ Newspapers
- ❖ Name badges
- ❖ Electronic Media and 24/7 Wifi
- ❖ Magazines
- ❖ Medical Research Assistance
- ❖ Equipment loans for the vision impaired



The Public Library at Tellico Village 2018 Update

❖ Services

❖ Inter-library loans

❖ Drop off old eye glasses/hearing aids

❖ Seasonal Non-profits

❖ HOA dues

❖ Voter registration by mail form

❖ Website <http://www.tvlibrary.org/>



The Public Library at Tellico Village 2018 Update

- **Who we serve**
- **How we get our funding**
 - **Friends of Library**
 - **County**
 - **POA**
 - **Private/ Memorials**
 - **Grants**



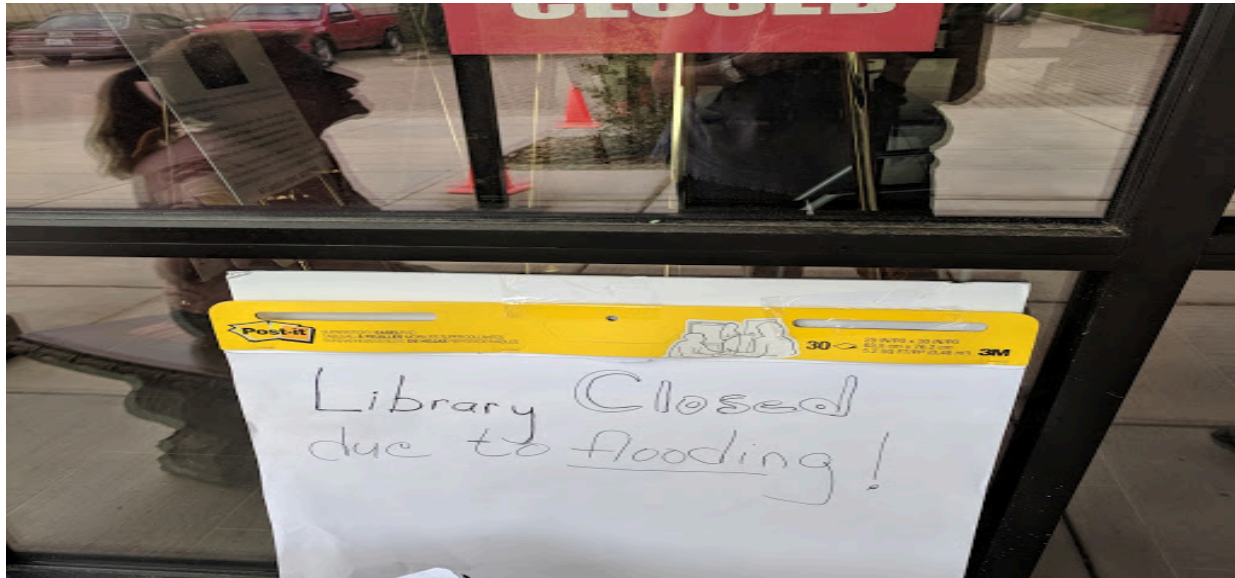


The Public Library at Tellico Village 2018 Update

2018 Achievement Recap:

- ❖ Summer Reading Program
- ❖ State Tech Grant
- ❖ Additional New Services
- ❖ Stats
- ❖ Recovery





August 2018 FLOOD





The Public Library at Tellico Village 2018 Update

2019 Objectives:

❖ Top Goals

❖ Recruit new board members

❖ Membership FOTVL

❖ Facility protection



The Public Library at Tellico Village 2018 Update

- ❖ **Some key programs planned**
 - ❖ **Little library houses**
 - ❖ **Additional part-time employee**
 - ❖ **Possibility of Seed Library**





Joe Beyel

Chair - Tellico Community Foundation Advisory Board



Mission

TCF exists to help people in need

Guiding Principles

- **Identify and evaluate community needs**
- **Work with other organizations to maximize impact**
- **Meet unmet needs where funding can make a difference**
 - **Create opportunities for charitable giving**

Affiliation with East Tennessee Foundation



Focus Areas for Support

Early Childhood Literacy

Support for Seniors

Opioid Crisis

Community Enrichment



What are your gifts used for?

60% for Grantmaking and 40% for Endowment

Newest Grant – TV Seniors in Need Research Project



What can you do to help?

Consider making a gift today

Tell your friends about the TCF

Attend a TCF Educational Forum

Are you 701/2? Do you have an IRA?



**Mark
Your
Calendar**

Upcoming HOA General Meeting – March 14

Topics:

- “Cyber Security”
- Update on Tellico Village Marketing Performance.

If you have a question or comment, please raise your hand and ushers will bring a microphone to you.



Thank You

