

Lansdowne Woods of Virginia Community Association, LLC

Board of Members Meeting Notice/Agenda

Wednesday, July 1, 2026

10:00 a.m. – Executive Session

1:00 p.m. – Open Session

Meeting attendance in person in Clubhouse Auditorium or Zoom.

Zoom meeting ID: 842 5781 1800 and Passcode: 754001

Zoom Link:

<https://us02web.zoom.us/j/84257811800?pwd=KzV0ejVRNXZDN2pKNXhURXJUNFhldz09>

Livestream to the LWVA YouTube channel:

<https://www.youtube.com/channel/UCaJGO4Z-fsmxxHgZqHkRVnw>

This meeting will be recorded. Please silence all cell phones.

- I. Call to Order – 10:00 a.m.**
- II. Approval of the Agenda [1-2]**
- III. Executive Session [3]**
 - A. Discuss and Consider Contracts
 - B. Discuss and Consider Pending or Probable Litigation
 - C. Consider Personnel Matters
- IV. Return to Open Session and Recess Until 1:00 p.m.**
- V. Reconvene Open Session – 1:00 p.m. in Auditorium and Zoom**
- VI. Action on Executive Session Items**
- VII. Owner/Resident Comments (agenda items only)**
- VIII. Review & Approval Minutes**
 - A. Minutes of June 3, 2026, BOM Meeting [4-7]
 - B. Minutes of June 18, 2026, Special BOM Meeting [8-9]
- IX. Reports**
 - A. Comments from Officers
 1. President (Wayne Kaiser)
 2. Vice President (Wes Henderson)
 3. Secretary (Trudy Gross)
 4. Treasurer (David Saine) [10]

- B. Lansdowne Conservancy (Maryann Mueller-Davis)
 - C. Director of Activities (Donaliece Carey) [11-12]
 - D. Management Report (Audra Reed) [13-14]
 - E. May 2026 Financials (Audra Reed) [15-29]
- X. Committee & Working Group Reports (as needed)**
- A. Activities Committee (Peggy King) [30-33]
 - B. Building & Grounds Committee (Marie Gay) [34-36]
 - C. Budget & Finance Committee (Barry Riordan) [37-40]
 - D. Communications Committee (Kathleen Hughes) [41-42]
 - E. External Communications Working Group – Standing (Peggy Hamaker) [43-46]
 - F. Policy Resolutions Working Group – Ad Hoc (Mary Ferney) [47-49]
 - G. Reserves Study Committee – Ad Hoc (Josh Snodgrass) [50-51]
- XI. Correspondence to the BOM**
- XII. Unfinished Business**
- A. Shuttle Bus Service [52-94]
 - B. Changes to PR #33 – Purchasing Goods, Procurement of Services, and Competitive Bidding [95-103]
 - C. Review Feedback on Snow and Ice Removal Coordination & Cost-Sharing Agreement & Determine Next Steps [104-121]
- XIII. New Business**
- A. Garden Plots Retimbering Project [122-127]
 - B. Architectural Design Review – Potomac Ridge Unit #118 [128-137]
 - C. Review 1st Draft of Policy Resolution #41 – Responsibility for Underground Utility Structure [138-141]
 - D. Evaluation of the 2021 Strategic Plan and Determine Next Steps [142-157]
- XIV. Owner/Resident Open Forum Comments**
- XV. Recess to Executive Session (if necessary – must state purpose)**
- XVI. Reconvene & Actions to Take from Executive Session (if applicable)**
- XVII. Adjournment**

The next meeting of the Board of Members for Lansdowne Woods of Virginia Community Association, LLC will be on August 5, 2026, at 1:00 p.m.



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM III

Proposed motion: Move that the meeting be recessed and the Board of Members immediately reconvene in executive session to *(state all that apply)*:

- consider personnel matters
- consult with legal counsel
- discuss and consider contracts
- discuss and consider pending or probable litigation
- discuss and consider matters involving violations of the declaration or rules and regulations
- discuss and consider the personal liability of members to the association

as permitted by subsection C of Section 55.1-1816 of the Virginia Property Owner’s Association Act.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	MG	83.5				
Bishopp, Fred T., Jr.	RB	114.5				
Gross, Trudy M.	RV	120.5				
Henderson, Wesley C.	OV	7				
Kaiser, Wayne A.	PR	115				
Lavanty, Donald F., Sr.	RB	114.5				
Nyhan, Andrea	BR	119.5				
Norton, Mary K.	RV	120.5				
Phelan, Merrill D.	MG	83.5				
Saine, David V. (proxy to Wayne Kaiser)	PR	115				
Upp, David J.	BR	119.5				
	TOTAL	1113				

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC
BOARD OF MEMBERS MEETING

MINUTES OF JUNE 3, 2026

The following resolutions and actions reflect those adopted by the Board of Members of Lansdowne Woods of Virginia Community Association, LLC, a Virginia limited liability company (“Association”) at a meeting held at the Lansdowne Woods of Virginia Clubhouse, 19375 Magnolia Grove Sq., Leesburg, VA 20175, on June 3, 2026.

Present

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>
Berger, Barry A.	Magnolias - Rep 1	83.5
Bishopp, Fred T., Jr. (Proxy to Donald F Lavanty, Sr.)	Riverbend - Rep 2	114.5
Gross, Trudy M. (Proxy to Mary Norton)	Riverview - Rep 2	120.5
Henderson, Wesley C.	Overlook -Rep 1	7
Kaiser, Wayne A.	Potomac Ridge - Rep 1	115
Lavanty, Donald F., Sr.	Riverbend - Rep 1	114.5
Nyhan, Andrea	Blue Ridge - Rep 1	119.5
Norton, Mary K.	Riverview - Rep 1	120.5
Phelan, Merrill D.	Magnolias - Rep 2	83.5
Saine, David V.	Potomac Ridge - Rep 2	115
Upp, David J.	Blue Ridge - Rep 2	119.5

Total Votes

1113

Others Present: Audra J. Reed, General Manager; Susie Pfefferkorn, Assistant General Manager; Donaliece Carey, Activities Director

Absent: Fred T. Bishopp, Jr. (Proxy to Donald F. Lavanty, Sr. and Trudy M. Gross (Proxy to Mary Norton)

Wayne Kaiser called the meeting to order at 1:03 p.m.

Motion to approve the agenda made by Henderson, seconded by Lavanty. Motion passed unanimously.

Motion to approve the Board of Members Meeting Minutes of May 6, 2026, made by Phelan and seconded by Nyhan. Motion passed unanimously.

26-06-03-01 RESOLVED, to dissolve the Commercial Amenities Working Group made by Henderson and seconded by Norton. Yes: Gross, Kaiser, Lavanty Nyhan, Norton, Phelan, Upp. No: Berger, Henderson, Saine. Abstain: Bishopp. Motion passed.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	Magnolias - Rep 1	83.5		83.5		
Bishopp, Fred T., Jr. (Proxy to Donald Lavanty)	Riverbend - Rep 2	114.5			114.5	
Gross, Trudy M. (proxy to Mary Norton)	Riverview - Rep 2	120.5	120.5			
Henderson, Wesley C.	Overlook -Rep 1	7		7		
Kaiser, Wayne A.	Potomac Ridge - Rep 1	115	115			
Lavanty, Donald F., Sr.	Riverbend - Rep 1	114.5	114.5			
Nyhan, Andrea	Blue Ridge - Rep 1	119.5	119.5			
Norton, Mary K.	Riverview - Rep 1	120.5	120.5			
Phelan, Merrill D.	Magnolias - Rep 2	83.5	83.5			
Saine, David V.	Potomac Ridge - Rep 2	115		115		
Upp, David J.	Blue Ridge - Rep 2	119.5	119.5			

Total Votes	1113	1113	793	205.5	114.5	0	1113
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26-06-03-02 RESOLVED, to authorize the General Manager to draft a resolution for Board consideration clarifying LWVA's responsibility for underground utility structure. Moved by Norton and seconded by Phelan. Motion passed unanimously.

26-06-03-03 RESOLVED, to approve the proposed amended and restated Policy Resolution #7: Assignment, Use, and Maintenance of Garden Plots as amended. Moved by Henderson and seconded by Phelan. Motion passed unanimously.

26-06-03-04 RESOLVED, to approve the proposed amended and restated Policy Resolution #8: Reservation, Use and Rental of Clubhouse Rooms, as presented. Moved by Norton and seconded by Nyhan. Motion passed unanimously.

26-06-03-05 RESOLVED, to approve the proposed amended and restated Policy Resolution #10: Woodshop and Woodworking Club as presented. Moved by Lavanty and seconded by Phelan. Motion passed unanimously.

26-06-03-06 RESOLVED, to approve the proposed amended and restated Policy Resolution #23: Strategic Planning Group as amended. Moved by Berger and seconded by Nyhan. Motion passed unanimously.

26-06-03-07 RESOLVED, to approve the proposed amended and restated Policy Resolution #31 Credit Card Policy, as presented. Moved by Lavanty and seconded by Henderson. Motion passed unanimously.

26-06-03-08 RESOLVED, to approve the proposed amended and restated Policy Resolution #33: Purchasing Goods, Procurement of Services and Competitive Bidding as presented. Motion was amended by Phelan and seconded by Berger to table a decision on the proposed amended and restated Policy Resolution #33 until July to allow for the General Manager to revise wording. Motion passed unanimously.

26-06-03-09 RESOLVED, to approve the Association’s audited financial statement for the fiscal year ended December 31, 2025, as prepared by Daly, Hamad & Associates, P.L.L.C., subject to any final minor revisions, formatting corrections, completion of remaining audit procedures, and issuance of the final signed audit report. Moved by Saine and seconded by Phelan. Motion passed unanimously.

Motion to recess into Executive Session at 4:02 p.m. for discussion and consideration of pending or probable litigation made by Kaiser and seconded by Norton. Motion passed unanimously. Motion to return to Open Session at 5:32 p.m. was made by Norton and seconded by Henderson. Motion passed unanimously.

26-06-03-10 RESOLVED, to approve reimbursement of \$12,750 to The Magnolias at Lansdowne Woods Condominium Unit Owners Association for previously incurred costs related to the repair of a water main pipe serving Magnolias South. Moved by Phelan and seconded by Henderson. Yes: Berger, Bishopp, Gross, Henderson, Lavanty, Norton, Phelan, and Upp. No: Kaiser, Nyhan, and Saine. Motion passed.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	Magnolias - Rep 1	83.5	83.5			
Bishopp, Fred T., Jr. (Proxy to Donald Lavanty)	Riverbend - Rep 2	114.5	114.5			
Gross, Trudy M. (Proxy to Mary Norton)	Riverview - Rep 2	120.5	120.5			
Henderson, Wesley C.	Overlook -Rep 1	7	7			
Kaiser, Wayne A.	Potomac Ridge - Rep 1	115		115		
Lavanty, Donald F., Sr.	Riverbend - Rep 1	114.5	114.5			
Nyhan, Andrea	Blue Ridge - Rep 1	119.5		119.5		
Norton, Mary K.	Riverview - Rep 1	120.5	120.5			
Phelan, Merrill D.	Magnolias - Rep 2	83.5	83.5			
Saine, David V.	Potomac Ridge - Rep 2	115		115		
Upp, David J.	Blue Ridge - Rep 2	119.5	119.5			

Total Votes 1113

1113	763.5	349.5	0	0	1113
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Motion to adjourn the meeting at 5:34 p.m. made by Henderson and seconded by Norton, Motion passed unanimously.

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LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC
SPECIAL BOARD OF MEMBERS MEETING

MINUTES OF JUNE 18, 2026

The following resolutions and actions reflect those adopted by the Board of Members of Lansdowne Woods of Virginia Community Association, LLC, a Virginia limited liability company (“Association”) at a special meeting held at the Lansdowne Woods of Virginia Clubhouse, 19375 Magnolia Grove Sq., Leesburg, VA 20175, on June 18, 2026.

Present:

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>
Berger, Barry A.	Magnolias - Rep 1	83.5
Bishopp, Fred T., Jr.	Riverbend - Rep 2	0
Gross, Trudy M.	Riverview - Rep 2	120.5
Henderson, Wesley C.	Overlook -Rep 1	7
Kaiser, Wayne A.	Potomac Ridge - Rep 1	115
Lavanty, Donald F., Sr.	Riverbend - Rep 1	114.5
Nyhan, Andrea	Blue Ridge - Rep 1	119.5
Norton, Mary K.	Riverview - Rep 1	120.5
Phelan, Merrill D.	Magnolias - Rep 2	83.5
Saine, David V.	Potomac Ridge - Rep 2	115
Upp, David J.	Blue Ridge - Rep 2	119.5

Total Votes

998.5

Others Present: Audra J. Reed, General Manager, Susie Pfefferkorn, Assistant General Manager; Michael Sternberg, Sternberg Hospitality

Present on Zoom: Barry A. Berger and David J. Upp

Absent: Fred T. Bishopp, Jr.

Kaiser called the meeting to order at 9:30 a.m.

Motion to approve the agenda made by Henderson, seconded by Lavanty. Motion passed unanimously.

Motion to recess into Executive Session at 9:34 a.m. to meet with Michael of Sternberg Hospitality to discuss Operator Assessment, Review Status of Negotiations and Operator Comments. Moved by Kaiser and seconded by Henderson. Motion passed unanimously.

Motion to return to Open Session at 11:01 a.m. was made by Nyhan and seconded by Lavanty. Motion passed unanimously.

No actions were taken as a result of Executive Session.

Motion to adjourn the meeting at 11:02 a.m. made by Henderson and seconded by Norton. Motion passed unanimously.

DRAFT

<u>Instruments</u>	<u>Maturity</u>	<u>Rate</u>	<u>Amount</u>
Cash		0.0100	45,357.34
MSBNA Preferred Savings		3.3500	187,219.51
MSPBNA Preferred Savings		3.3500	187,529.19
Total Cash			420,106.04
Certificates of Deposit			
Bradesco Bank	9/28/2026	4.3500	50,000.00
UBS Bk USA Salt L City	12/18/2026	4.1500	50,000.00
Northeast Bank	3/24/2027	4.0000	50,000.00
First Bank Osage Beach	4/30/2027	3.6000	50,000.00
Live Oak Bkg Wilmington	9/23/2027	3.6500	75,000.00
BMW Bank Salt Lake	10/4/2027	4.0000	50,000.00
City Nat'l Bank Los Ang.	2/14/2028	3.8500	75,000.00
Goldman Sachs NY	3/27/2028	4.0000	75,000.00
Toyota FinL Svgs	4/10/2028	4.0000	75,000.00
Merrick Bk Sth Jordan UT	8/10/2028	3.7000	50,000.00
Sallie Mae Ban Salt Lake	12/13/2028	4.4000	75,000.00
Morgan Stanley	6/20/2029	4.7000	50,000.00
Total CDS			725,000.00
Total			1,145,106.04

<u>Year</u>	<u>Reserve Expense</u>	<u>Amount</u>
2022	Expenses per Reserve Study (not yet incurred)	77,715.00
2023	Expenses per Reserve Study (not yet incurred)	17,841.31
2025	Expenses per Reserve Study (not yet incurred)	79,732.02
2026	Expenses per Reserve Study (not yet incurred)	114,896.89
	Total '22 - '26	290,185.22

**MONTHLY REPORT FOR CLUBHOUSE
COMMUNITY ACTIVITIES, TRIPS, AND EVENTS
July 2026**

Events and Trips:

- 7/1, 22 & 29 Laura Nickle plays in the Fireside Lounge
- 7/4 4th of July Program
- 7/7 & 21 Loudoun County Library Outreach
- 7/14 & 28 Painting for a Cause with Ligia
- 7/8 United States Capitol Tour, Washington, DC
- 7/9 H&W Classroom w/ Waltonwood
- 7/9 TWK w/ TBA
- 7/11 & 18 Tech Help with Nikitha Karthik
- 7/13 New Resident Clubhouse Tour
- 7/15 Worlds Okayest Trivia
- 7/16 H&W Classroom w/ Firefly Acupuncture & Wellness
- 7/16 TWK with Craftail
- 7/19 "Bettlejuice" at National Theater
- 7/23 H&W Classroom w/ Restore Health
- 7/23 TWK w/ Loudoun Jazz Ensemble
- 7/30 H&W Classroom w/ Virginia Eye Center
- 7/30 TWK w/ The Omelette Guys with background music by Laura Nickle

Activities:

- **Ongoing Weekly**
 - **Bee Keepers Club:** As announced.
 - **Board Games:** Thursdays.
 - **Bocce Ball Organized Play:** Mondays, Wednesdays, & Fridays.
 - **Bowling Group:** Thursdays at Bowl America.
 - **Chair Volleyball:** Mondays
 - **Dance Class Group:** Tuesdays
 - **Discovery Group:** Thursdays.
 - **Drama Troupe:** Fridays.
 - **Flute Ensemble:** Tuesdays
 - **Great Science & Engineering Courses:** Mondays.
 - **Honor Flight Greeters:** group resumes in April.
 - **Informal Support Group for Stroke/Aphasia:** Mondays
 - **Instrumental Ensemble:** Tuesdays.
 - **Instrumental Quartet:** Wednesdays
 - **Library Chat Group:** Tuesdays.
 - **Library Volunteer Group:** Weekdays.
 - **LWVA Golf League:** as announced.
 - **Notables:** Thursdays.
 - **Open String Jam:** Tuesdays.
 - **Pottery Club:** Daily.
 - **Racquet Club:** Daily as weather allows.
 - **Table Tennis Group:** Tuesdays, Thursdays, and Saturdays.
 - **Table Tennis Open Play:** Saturday evening, all day Sunday.
 - **Tap Dancing:** Wednesdays & Fridays.
 - **Tap Dancing for Beginners:** Wednesdays
 - **Water Volleyball:** Mondays, Wednesdays, and Fridays.

- **Woodworking Club:** Daily.
- **Writers Workshop:** Second and fourth Thursday.
- **Ongoing Monthly**
 - **Democratic Club Meeting:** Fourth Monday.
 - **Duplicate Bridge at Potomac Ridge:** Third Sunday.
 - **Electric Vehicle Club:** As announced.
 - **New! The Garden Keepers:** TBA
 - **Hiking Club:** Third Saturday, September through June.
 - **Karaoke: Two Saturdays a month, dates rotate.**
 - **Library Book Club:** Fourth Monday.
 - **Loudoun County Library Outreach:** First and third Tuesday.
 - **Photo Club:** First Thursday
 - **Republican Club Meeting:** Third Tuesday.
 - **Sewing Guild:** Second Tuesday.
 - **Torch Club:** Second Tuesday September through May.

Chapel Activities:

- **Catholic Mass:** Second Friday.
 - **Catholic Bible Study:** Wednesdays.
 - **Catholic Grief Support Group:** Third Monday.
 - **Catholic private bus rental to St. Theresa's:** Sundays.
 - **Rosary:** Sundays.
- **New! Humanism Discussion Group:** Third Sunday.
- **Jewish Sabbath Service & Programs:** As announced.
- **Lutheran Bible Study:** Tuesdays.
- **Protestant Service:** Sundays.
 - **Prayer Service:** Mondays.
 - **Choir Practice:** Fridays.
 - **Bible Study:** Sundays.
 - **Chapel Chimers:** Wednesdays.
- **Unitarian Universalist Meetup, Support, and Discussion Group:** First Sunday.

Activities Committee: Draft meeting minutes included.



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM IX.D

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Management Updates

1. The employee benefits open enrollment process has been completed. The new medical, dental, vision, life, and disability benefits become effective July 1, 2026.
2. The fountain refurbishment project has been completed by the contractor. The total project cost was approximately \$48,000, and no contingency funds were needed as no additional hidden damage was discovered. Dondi is currently reassembling the pump and motor components, and we anticipate the fountain will be fully operational during the week of June 29.
3. Activities Assistant Mary Brennan has announced her resignation, effective July 8, 2026. We are sorry to see Mary leave, as she has been a valuable member of our team. Recruitment for her replacement will begin shortly.
4. Management continues to work with our gatehouse contractor regarding ongoing staffing and performance concerns. There has been significant turnover among gatehouse personnel, and we continue to address these issues with the contractor.
5. The community grounds continue to look great. The maintenance shed area has been cleaned and organized, and stone is currently being installed on various areas of the walking trail.
6. Management has begun preparing the first draft of the 2027 Operating Budget, which will be presented to the Budget & Finance Committee at its July 28 meeting.
7. The Reserve Study Committee has completed its initial review of the draft 2026 Replacement Reserve Study. The initial funding recommendation reflected approximately a 12% increase in reserve contributions. The Committee requested several revisions, including adjustments to the assumed interest rate and reserve funding thresholds. DMA is preparing a revised draft, and the Committee expects to meet again in July before the Budget & Finance Committee meeting.
8. The Building & Grounds Committee recommended proceeding with a \$3,700 Yellowstone Landscape proposal for vegetation maintenance on a portion of the hillside behind Magnolias East. The work is scheduled for this fall and is intended to improve the appearance and maintainability of the area. As previous studies have concluded, this is an ongoing

maintenance issue rather than one that can be permanently eliminated. Barring any objections from the Board, management intends to proceed with the work this fall and incorporate periodic hillside maintenance into the annual landscape contract going forward.

Building Engineers Report / Reporting Period: June 9, 2026 – July 22, 2026

Ongoing Responsibilities

- Room setups for meetings and resident organizations
- Add water to golf cart batteries (monthly)
- Put away tennis tables (Tuesdays and Thursdays)
- Check pool water level, equipment operation, and chemical levels (daily)
- Daily building and grounds inspections
- Attend Building & Grounds Committee meetings (monthly)
- Clean large fountain filter (weekly, seasonal)

Pool & Fountain

- Drained pool filters in preparation for repairs
- Vacuumed pool
- Repaired outside shower in pool area
- Replaced pool area spigot
- Removed and stored fountain lights
- Repaired leak in large fountain water feed
- Cleaned leaves and debris from fountain vault
- Cleaned and organized parapet area adjacent to the fountain
- Supervised contractor during fountain refurbishment

Restaurant & Kitchen

- Replaced flanges and gaskets on the restaurant circulating pump
- Thoroughly cleaned patio grill after resident use
- Cleaned restaurant floor and kitchen appliances
- Cleaned and adjusted ice maker in the catering kitchen

Building Maintenance & Repairs

- Patched and painted chapel hallway walls
- Replaced hallway ceiling tiles
- Repaired wall in the women's locker room
- Repaired and painted auditorium wall
- Repaired dumpster gate stop
- Adjusted water flow on drinking fountain and replaced broken shroud
- Tightened handles on ladies' locker room showers

Plumbing & Fixtures

- Replaced soap dispenser in the family restroom
- Repaired one and replaced one soap dispenser in the men's locker room

Electrical

- Repaired lights #24, #26, #51, #61, #72, and #73

- Tested emergency and exit lighting
- Checked and tested the auditorium T-coil hearing loop

Equipment & Grounds

- Inspected the community perimeter fence for damage
- Cleaned and organized shed and exterior shed area
- Installation of gravel/stone in certain areas on walking trail
- Troubleshoot sump pump failure in the vault (motor shorted); replacement motor ordered

Lansdowne Woods of Virginia Community Association

19375 Magnolia Grove Square, Lansdowne, VA 20176
703-723-1501

TO: Board of Members
FROM: Cathy Williams, Finance Director
DATE: June 26, 2026
RE: Report on May 2026 Financial Statements

FINANCIALS:

Enclosed please find the May 2026 financial statements prepared by Barkan Management Company. **Please note: the 2025 audit adjusting journal entries have been posted. As such, the previous balances have changed.**

	End of Current Month	End of Prior Month	Change
Total Cash & Receivables	\$382,744	\$400,197	-\$17,452
Plus Reserve Funds	\$1,150,952	\$1,083,688	\$67,264
Plus Prepaid Expenses	\$49,250	\$68,465	-\$19,214
Plus Fixed Assets (less depreciation)	\$74,302	\$74,302	\$0
Equals Total Assets	\$1,657,249	\$1,626,652	\$30,598
Less Total Liabilities	\$150,425	\$165,609	-\$15,184
Equals Total Equity	\$1,506,824	\$1,461,042	\$45,782
Less Association Reserve Funds	\$1,138,807	\$1,124,607	\$14,200
Less Working Capital	\$70,193	\$67,601	\$2,592
Less Operating Reserves	\$296,003	\$296,003	\$0
Equals Accumulated Surplus/(Deficit)	\$1,821	-\$27,169	\$28,990

INCOME STATEMENT & BUDGET VARIANCE REVIEW:

<i>OPERATING PERFORMANCE</i>	<u>ACTUAL</u>	<u>BUDGET</u>	<u>VARIANCE</u>
Month of May	\$28,990	\$16,161	\$12,829
Year-to-Date	\$1,821	\$158	\$1,663

<u>INCOME</u>	BUDGET VARIANCE		BUDGET AMOUNT	
	(UNFAVORABLE) / FAVORABLE			
	<u>Month</u>	<u>Year-to-Date</u>	<u>Month</u>	<u>Year-to-Date</u>

ASSESSMENTS	\$0	\$0	\$266,328	\$1,331,640
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The assessments are in line with the budget.

OTHER INCOME	(\$655)	(\$2,451)	\$8,108	\$40,542
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The category was unfavorable \$655 for the month and unfavorable \$2,451 for the year-to-date. For the current period, Interest Income and Resal Package Income were short of budget.

ACTIVITIES INCOME	\$9,248	\$14,251	\$10,000	\$50,000
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The category was favorable \$9,248 for the month and favorable \$14,251 for the year-to-date. In the month, all accounts were favorable.

<u>EXPENSES</u>	BUDGET VARIANCE		BUDGET AMOUNT	
	(OVER)/UNDER			
	<u>Month</u>	<u>Year-to-Date</u>	<u>Month</u>	<u>Year-to-Date</u>

ACTIVITIES EXPENSES	(\$508)	\$1,366	\$10,833	\$54,167
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The category was unfavorable \$508 for the month and favorable \$1,366 for the year-to-date. In the month, only Fitness was favorable.

Net Activities were favorable \$15,617 for year-to-date.

UTILITIES	(\$1,117)	(\$3,495)	\$11,765	\$63,473
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There was an unfavorable variance of \$1,117 for the month and an unfavorable variance of \$3,495 for the year-to-date. In the month, Telephone was over budget \$58 (timing – two invoices); Cable was over budget \$421 (fire sticks for TVs); Electricity was over budget \$460; Water & Sewer was \$1,051 over budget; Natural Gas was \$873 under budget; and Assn Utility Reimbursement was at budget.

<u>EXPENSES</u>	BUDGET VARIANCE		BUDGET AMOUNT	
	(OVER)/UNDER			
	<u>Month</u>	<u>Year-to-Date</u>	<u>Month</u>	<u>Year-to-Date</u>

CONTRACTS	(\$2,639)	(\$9,059)	\$86,276	\$453,880
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The category posted an unfavorable variance of \$2,639 for the month and an unfavorable variance of \$9,059 for the year-to-date. In the month, Security Contract was over budget \$2,745 mostly due to timing. A reimbursement is due from Blue Ridge for fire watch patrol, and a credit was received from Dunbar for a billing error. This will be shown on the June financials.

REPAIR & MAINTENANCE	\$4,365	\$944	\$10,463	\$52,313
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The category was favorable \$4,365 for the month and favorable \$944 for the year-to-date. In the month, Grounds Non Contract and Tree Maintenance were under budget \$1,942 and \$1,667, respectively, accounting for the bulk of the favorable variance. Conversely, Irrigation Repairs was over budget \$2,062 due to spring start-up repairs.

PERSONNEL	\$4,228	\$21,941	\$80,892	\$444,904
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The category posted a favorable variance of \$4,228 for the month and a favorable variance of \$21,941 for the year-to-date. In the month, Admin Salaries was under budget \$3,145 mostly due to a change in staff, and accounts for the bulk of the favorable variance.

ADMINISTRATIVE	\$1,019	(\$11,308)	\$16,165	\$89,926
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The category was favorable \$1,019 for the month and unfavorable \$11,308 for the year-to-date. For the current month, nearly all accounts were favorable. Legal Fees were under budget \$774, contributing to the month-end favorable variance.

<u>EXPENSES</u>	BUDGET VARIANCE		BUDGET AMOUNT	
	(OVER)/UNDER			
	<u>Month</u>	<u>Year-to-Date</u>	<u>Month</u>	<u>Year-to-Date</u>

TAXES & INSURANCE	(\$1,488)	(\$13,059)	\$2,951	\$18,706
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The category was unfavorable \$1,488 for the month and unfavorable \$13,059 for the year-to-date. In the month, Property & Liability Insurance was over budget \$1,401 as the premiums increased more than budgeted for the year.

RESERVE ACTIVITY	\$376	\$2,533	\$48,931	\$244,655
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This category was unfavorable \$376 for the month and unfavorable \$2,533 for the year-to-date. For the current period, Reserve Interest was short of budget.

2026 Expenses total (\$57,006) at the end of May and are itemized as follows:

January '26 =	\$ 501	Gate arm/Walk-in freezer parts
February '26 =	\$ 435	Gate Arm
March '26 =	\$ 5,200	Final Poolpak
	\$ 2,415	Gatehouse Floor
	\$ 150	Morgan Stanley service charge
April '26 =	\$11,955	Aerobics Studio HVAC
	\$ 1,995	Elevator Tech (Fire Panel Replacement)
May '26 =	\$26,512	Theater A/V Equipment
	\$ 7,843	Reserve Study Deposit (90%)

WORKING CAPITAL

The Working Capital Balances are as follows:

December '25 =	\$ 61,109
January '26 =	\$ 61,945
February '26 =	\$ 65,956
March '26 =	\$ 66,673
April '26 =	\$ 67,601
May '26 =	\$ 70,193

The May increase of \$2,592 results from Capital Contributions of \$2,592 (6 resales).

BANK STATEMENTS: The bank and investment reports for the current month are enclosed



Financial Report Package

May 2026

Prepared for

Lansdowne Woods of VA Comm Assoc, LLC

By

Barkan Management Company, Inc.

Description	Current Period			Year-to-date			Annual Budget
	Actual	Budget	Variance	Actual	Budget	Variance	
OPERATING FUND							
INCOME							
INCOME							
40-4110004 Blue Ridge Assessment	\$ 51,624.00	\$ 51,624.00	\$ -	\$258,120.00	\$258,120.00	\$ -	\$ 619,488.00
40-4110005 Magnolias Assessment	36,072.00	36,072.00	-	180,360.00	180,360.00	-	432,864.00
40-4110006 Potomac Ridge Assessment	49,680.00	49,680.00	-	248,400.00	248,400.00	-	596,160.00
40-4110007 Riverbend Assessment	49,464.00	49,464.00	-	247,320.00	247,320.00	-	593,568.00
40-4110008 Riverview Assessment	52,056.00	52,056.00	-	260,280.00	260,280.00	-	624,672.00
40-4110009 Overlook Assessments	1,512.00	1,512.00	-	7,560.00	7,560.00	-	18,144.00
40-4110010 Vistas at Lansdowne Assess	25,920.00	25,920.00	-	129,600.00	129,600.00	-	311,040.00
TOTAL INCOME	\$266,328.00	\$ 266,328.00	\$ -	\$1,331,640.00	\$1,331,640.00	\$ -	\$3,195,936.00
OTHER INCOME							
42-4240000 Stores and Commercial	2,525.00	1,025.00	1,500.00	8,125.00	5,125.00	3,000.00	12,300.00
42-4413000 Interest Income - Due to Reser	3,374.24	3,750.00	(375.76)	16,217.06	18,750.00	(2,532.94)	45,000.00
42-4415000 Interest - Oper. Reserves	920.38	1,500.00	(579.62)	5,616.35	7,500.00	(1,883.65)	18,000.00
42-4990000 Miscellaneous Inc	251.69	250.00	1.69	1,687.31	1,250.00	437.31	3,000.00
42-4990220 Resale Package	381.73	1,583.33	(1,201.60)	6,444.67	7,916.65	(1,471.98)	19,000.00
TOTAL OTHER INCOME	\$ 7,453.04	\$ 8,108.33	(\$ 655.29)	\$ 38,090.39	\$ 40,541.65	(\$ 2,451.26)	\$ 97,300.00
ACTIVITIES INCOME							
43-4990014 Activities Income-Events	10,431.00	3,333.33	7,097.67	29,259.25	16,666.65	12,592.60	40,000.00
43-4990015 Activities Income-Fitness	4,225.00	2,916.67	1,308.33	16,875.00	14,583.35	2,291.65	35,000.00
43-4990016 Activities Income-Trips	4,592.00	3,750.00	842.00	18,117.00	18,750.00	(633.00)	45,000.00
TOTAL ACTIVITIES INCOME	\$ 19,248.00	\$ 10,000.00	\$ 9,248.00	\$ 64,251.25	\$ 50,000.00	\$ 14,251.25	\$ 120,000.00
TOTAL INCOME	\$293,029.04	\$ 284,436.33	\$ 8,592.71	\$1,433,981.64	\$1,422,181.65	\$ 11,799.99	\$3,413,236.00
EXPENSES AND RESERVE FUNDING							
ACTIVITIES EXPENSES							
45-5301003 Activities Expense-Events	5,004.10	4,166.67	(837.43)	24,746.88	20,833.35	(3,913.53)	50,000.00
45-5301004 Activities Expense-Fitness	2,149.71	2,916.67	766.96	8,519.61	14,583.35	6,063.74	35,000.00
45-5301005 Activities Expense-Trips	4,187.24	3,750.00	(437.24)	19,534.24	18,750.00	(784.24)	45,000.00
TOTAL ACTIVITIES EXPENSES	\$ 11,341.05	\$ 10,833.34	(\$ 507.71)	\$ 52,800.73	\$ 54,166.70	\$ 1,365.97	\$ 130,000.00
UTILITIES							
50-5360000 Telephone and Answering Serv	858.13	800.00	(58.13)	3,673.82	4,000.00	326.18	9,600.00
50-5360100 Cable Expense	1,560.53	1,139.58	(420.95)	6,018.49	5,697.90	(320.59)	13,675.00
50-5450000 Electricity	5,460.03	5,000.00	(460.03)	29,626.99	28,500.00	(1,126.99)	76,000.00
50-5451000 Water	3,126.23	2,075.00	(1,051.23)	7,815.76	7,525.00	(290.76)	23,000.00
50-5452000 Gas	1,876.84	2,750.00	873.16	19,832.36	17,750.00	(2,082.36)	37,000.00
50-5459130 Utility Reimbursement	-	-	-	-	-	-	8,000.00
TOTAL UTILITIES	\$ 12,881.76	\$ 11,764.58	(\$ 1,117.18)	\$ 66,967.42	\$ 63,472.90	(\$ 3,494.52)	\$ 167,275.00
CONTRACTS							
53-5311130 IT Support Contract	1,493.80	1,541.67	47.87	8,723.42	7,708.35	(1,015.07)	18,500.00
53-5360090 Web Site	319.52	216.67	(102.85)	1,968.44	1,083.35	(885.09)	2,600.00
53-5517000 Janitor and Cleaning Contract	7,790.00	8,106.67	316.67	39,047.50	40,533.35	1,485.85	97,280.00
53-5519000 Exterminating Contract	150.00	233.33	83.33	1,260.00	1,166.65	(93.35)	2,800.00
53-5521000 Window Washing	-	-	-	-	-	-	3,100.00
53-5525000 Garbage and Trash Removal	523.77	301.00	(222.77)	2,402.27	1,505.00	(897.27)	3,612.00
53-5530000 Security Contract	42,753.26	40,008.67	(2,744.59)	198,690.52	200,043.35	1,352.83	480,104.00
53-5537010 Landscaping Contract	14,023.88	14,023.92	0.04	70,119.40	70,119.60	0.20	168,287.00
53-5542010 Door Entry System	395.00	205.00	(190.00)	1,975.00	1,025.00	(950.00)	2,460.00
53-5542400 Bus Contract	10,899.17	11,080.83	181.66	54,495.85	55,404.15	908.30	132,970.00
53-5545000 Elevator Maintenance/Contract	191.77	183.33	(8.44)	958.85	916.65	(42.20)	2,200.00
53-5547000 Swim Pool Maintenance/Contra	10,375.00	10,375.00	-	51,875.00	51,875.00	-	124,500.00
53-5548000 Snow Removal	-	-	-	31,423.35	22,500.00	(8,923.35)	25,000.00
TOTAL CONTRACTS	\$ 88,915.17	\$ 86,276.09	(\$ 2,639.08)	\$462,939.60	\$453,880.45	(\$ 9,059.15)	\$1,063,413.00

Description	Current Period			Year-to-date			Annual Budget
	Actual	Budget	Variance	Actual	Budget	Variance	
REPAIR & MAINTENANCE							
55-5390250 Plants, Flowers & Decorations	\$-	\$41.67	\$41.67	\$-	\$208.35	\$208.35	\$500.00
55-5420000 Fuel Oil/Coal	1,042.24	1,000.00	(42.24)	4,508.12	5,000.00	491.88	12,000.00
55-5515000 Janitor and Cleaning Supplies	540.35	1,125.00	584.65	4,768.68	5,625.00	856.32	13,500.00
55-5518000 Uniforms	-	83.33	83.33	185.49	416.65	231.16	1,000.00
55-5531030 Life Safety Equipment	45.00	416.67	371.67	225.00	2,083.35	1,858.35	5,000.00
55-5537096 Grounds Non Contract	558.43	2,500.00	1,941.57	2,133.56	12,500.00	10,366.44	30,000.00
55-5537101 Tree Maintenance & Removal	-	1,666.67	1,666.67	-	8,333.35	8,333.35	20,000.00
55-5541003 Repairs-HVAC	-	333.33	333.33	415.49	1,666.65	1,251.16	4,000.00
55-5541006 Repairs-Electric	8.44	166.67	158.23	154.67	833.35	678.68	2,000.00
55-5541043 Exercise Equipment - Repairs	-	166.67	166.67	660.97	833.35	172.38	2,000.00
55-5541050 Repairs-Plumbing	8.96	166.67	157.71	1,903.00	833.35	(1,069.65)	2,000.00
55-5541052 Lighting Supplies	120.70	166.67	45.97	604.52	833.35	228.83	2,000.00
55-5541230 Maintenance Supplies	53.34	83.33	29.99	498.06	416.65	(81.41)	1,000.00
55-5541351 Audio-Visual R&M	-	41.67	41.67	93.50	208.35	114.85	500.00
55-5541352 Ballroom R&M	-	41.67	41.67	-	208.35	208.35	500.00
55-5541353 Fountain R&M	-	125.00	125.00	-	625.00	625.00	1,500.00
55-5541440 Carpets & Floors	-	233.33	233.33	3,420.00	1,166.65	(2,253.35)	2,800.00
55-5541750 Irrigation Repairs	2,478.80	416.67	(2,062.13)	2,535.52	2,083.35	(452.17)	5,000.00
55-5542211 Locks & Keys	30.94	125.00	94.06	2,774.71	625.00	(2,149.71)	1,500.00
55-5547021 Pool Supplies & Equipment	-	83.33	83.33	57.34	416.65	359.31	1,000.00
55-5547025 Pool Repairs & Maintenance	65.72	250.00	184.28	8,278.03	1,250.00	(7,028.03)	3,000.00
55-5562020 Painting	365.40	41.67	(323.73)	1,165.53	208.35	(957.18)	500.00
55-5570001 Vehicle Maintenance	-	41.67	41.67	2,037.08	208.35	(1,828.73)	500.00
55-5590000 Misc Operating and Maintenan	779.40	1,000.00	220.60	1,870.14	5,000.00	3,129.86	12,000.00
55-5590230 Tennis Expense	-	62.50	62.50	1,119.31	312.50	(806.81)	750.00
55-5620000 Restaurant Expenses	-	83.33	83.33	11,960.00	416.65	(11,543.35)	1,000.00
TOTAL REPAIR & MAINTENANCE	\$6,097.72	\$10,462.52	\$4,364.80	\$51,368.72	\$52,312.60	\$943.88	\$125,550.00
PERSONNEL							
57-5310000 S&W - Administrtv / Offc Salrs	40,730.21	43,874.96	3,144.75	227,671.91	241,312.28	13,640.37	592,312.00
57-5310060 S&W - Engineering	16,927.59	17,016.15	88.56	95,564.95	93,588.82	(1,976.13)	229,718.00
57-5711000 Payroll Taxes	4,416.32	4,837.41	421.09	27,966.64	26,605.75	(1,360.89)	65,305.00
57-5712000 Payroll Processing Fee	1,004.29	963.38	(40.91)	5,590.28	5,298.60	(291.68)	12,524.00
57-5721001 Group Insurance	11,727.07	11,654.85	(72.22)	55,259.72	64,101.67	8,841.95	151,513.00
57-5722000 Worker's Compensation	756.10	734.22	(21.88)	4,241.56	4,038.22	(203.34)	9,912.00
57-5723001 Benefits	1,101.68	1,810.74	709.06	6,668.14	9,959.07	3,290.93	24,445.00
TOTAL PERSONNEL	\$76,663.26	\$80,891.71	\$4,228.45	\$422,963.20	\$444,904.41	\$21,941.21	\$1,085,729.00
ADMINISTRATIVE EXPENSES							
60-5210000 Advertising	-	83.33	83.33	1,008.55	416.65	(591.90)	1,000.00
60-5311000 Office Supplies	145.35	250.00	104.65	1,109.37	1,250.00	140.63	3,000.00
60-5311010 Printing	-	416.67	416.67	2,293.63	2,083.35	(210.28)	5,000.00
60-5311012 Coffee & Water	130.75	166.67	35.92	655.09	833.35	178.26	2,000.00
60-5311030 Copier Lease	315.74	583.33	267.59	2,204.82	2,916.65	711.83	7,000.00
60-5311050 Postage	-	12.50	12.50	-	62.50	62.50	150.00
60-5311070 Office Equipment	86.02	83.33	(2.69)	264.79	416.65	151.86	1,000.00
60-5320000 Management Fee	6,406.86	6,361.00	(45.86)	32,034.30	31,805.00	(229.30)	76,332.00
60-5320030 Management Other Fees	68.00	41.67	(26.33)	251.34	208.35	(42.99)	500.00
60-5340000 Legal Expense	2,142.50	2,916.67	774.17	29,323.50	14,583.35	(14,740.15)	35,000.00
60-5341000 Licenses & Fees	1,307.18	833.33	(473.85)	2,501.53	4,166.65	1,665.12	10,000.00
60-5350000 Audit Expense	-	-	-	9,100.00	9,100.00	-	9,100.00
60-5360050 Communications Other	2,503.17	2,708.33	205.16	12,515.85	13,541.65	1,025.80	32,500.00
60-5390000 Misc Administrative Expenses	18.01	333.33	315.32	732.24	1,666.65	934.41	4,000.00
60-5390900 Misc Exp - Newsletter	1,556.10	750.00	(806.10)	3,890.25	3,750.00	(140.25)	9,000.00
60-5391000 Dues & Subscriptions	-	208.33	208.33	483.10	1,041.65	558.55	2,500.00
60-5394010 Professional Development	466.00	416.67	(49.33)	2,865.40	2,083.35	(782.05)	5,000.00
TOTAL ADMINISTRATIVE EXPENSES	\$15,145.68	\$16,165.16	\$1,019.48	\$101,233.76	\$89,925.80	(\$11,307.96)	\$203,082.00
TAXES & INSURANCE							
63-5312200 Income Taxes	-	-	-	9,779.00	3,750.00	(6,029.00)	15,000.00
63-5718020 Personal Property Taxes	87.33	-	(87.33)	226.38	200.00	(26.38)	600.00
63-5720000 Property & Liability Insurance (4,351.95	2,951.25	(1,400.70)	21,759.76	14,756.25	(7,003.51)	35,415.00
TOTAL TAXES & INSURANCE	\$4,439.28	\$2,951.25	(\$1,488.03)	\$31,765.14	\$18,706.25	(\$13,058.89)	\$51,015.00

Description	Current Period			Year-to-date			Annual Budget
	Actual	Budget	Variance	Actual	Budget	Variance	
FUND TRANSFERS							
69-9901015 Reserve Contributions	\$45,181.00	\$45,181.00	\$-	\$225,905.00	\$225,905.00	\$-	\$542,172.00
69-9901025 Reserve Contributions II	3,374.24	3,750.00	375.76	16,217.06	18,750.00	2,532.94	45,000.00
TOTAL FUND TRANSFERS	\$48,555.24	\$48,931.00	\$375.76	\$242,122.06	\$244,655.00	\$2,532.94	\$587,172.00
TOTAL DISBURSEMENTS	\$264,039.16	\$268,275.65	\$4,236.49	\$1,432,160.63	\$1,422,024.11	(\$10,136.52)	\$3,413,236.00
OPERATING FUND NET INCREASE (DECREASE)	\$28,989.88	\$16,160.68	\$12,829.20	\$1,821.01	\$157.54	\$1,663.47	\$-
NET INCREASE (DECREASE)	\$28,989.88	\$16,160.68	\$12,829.20	\$1,821.01	\$157.54	\$1,663.47	\$-



Balance Sheet - Comparative - Operating

Lansdowne Woods of VA Comm Assoc, LLC

End Date: 05/31/2026

	Current Balance at 5/31/2026	Prior Month Balance at 04/30/2026	Change
Assets			
CURRENT ASSETS			
10-1110000-00-00 Petty Cash	\$ 400.00	\$ 400.00	\$ -
10-1120001-00-00 Operating Cash	2,846.32	18,155.87	(15,309.55)
10-1120010-00-00 Deposits Other	20,000.00	20,000.00	-
10-1122000-00-00 Operating Reserve	105,927.40	105,463.06	464.34
10-1122001-00-00 Operating Reserve CD's	249,743.50	249,994.50	(251.00)
10-1122002-00-00 Operating Reserve Accr Int	2,696.86	1,989.82	707.04
10-1129000-00-00 Special purpose	1,130.35	1,433.57	(303.22)
10-1140000-00-00 AR-other	-	2,760.00	(2,760.00)
10-1142300-00-00 Due to Operating	-	(45,181.00)	45,181.00
10-1142310-02-02 Due to/from Reserve	-	45,181.00	(45,181.00)
Total CURRENT ASSETS:	\$ 382,744.43	\$ 400,196.82	\$ (17,452.39)
RESTRICTED DEPOSITS & FUNDED RESERVES			
13-1320000-02-02 Replacement Reserve-MM	\$ 420,106.04	\$ 302,660.06	\$ 117,445.98
13-1320105-02-02 Replacement Reserve-CD	724,999.25	774,999.25	(50,000.00)
13-1320600-00-00 Accrued Interest Receivable	5,846.94	6,028.68	(181.74)
Total RESTRICTED DEPOSITS & FUNDED RESERVES:	\$ 1,150,952.23	\$ 1,083,687.99	\$ 67,264.24
PREPAID EXPENSES			
15-1240000-00-00 Prepaid Property & Liability Insurance	\$ 17,628.87	\$ 17,615.89	\$ 12.98
15-1290000-00-00 Prepaid Expense-Operating	31,621.50	50,848.78	(19,227.28)
Total PREPAID EXPENSES:	\$ 49,250.37	\$ 68,464.67	\$ (19,214.30)
PROPERTY & EQUIPMENT			
17-1420140-00-00 Unit A	\$ 201,692.00	\$ 201,692.00	\$ -
17-1450901-00-00 Construction	26,281.29	26,281.29	-
17-1480000-00-00 Motor Vehicles	20,161.00	20,161.00	-
Total PROPERTY & EQUIPMENT:	\$ 248,134.29	\$ 248,134.29	\$ -
ACCUMULATED DEPRECIATION			
18-1700000-00-00 Accumulated Depreciation	\$ (173,831.85)	\$ (173,831.85)	\$ -
Total ACCUMULATED DEPRECIATION:	\$ (173,831.85)	\$ (173,831.85)	\$ -
Total Assets:	\$ 1,657,249.47	\$ 1,626,651.92	\$ 30,597.55
Liabilities & Equity			
CURRENT LIABILITIES			
20-2110000-00-00 Accounts Payable	\$ 33,439.95	\$ 48,421.59	\$ (14,981.64)
20-2120000-00-00 Accrued Wages and Payroll Taxes Payable	47,334.10	47,334.10	-
20-2123000-00-00 Accrued Expense	60,005.99	60,271.53	(265.54)
20-2240000-00-00 Deferred Income	1,070.25	1,007.25	63.00
Total CURRENT LIABILITIES:	\$ 141,850.29	\$ 157,034.47	\$ (15,184.18)
DEPOSITS LIABILITIES			
22-2191000-00-00 Tenant Security Deposits Held in Trust (Contra)	\$ 8,575.00	\$ 8,575.00	\$ -
Total DEPOSITS LIABILITIES:	\$ 8,575.00	\$ 8,575.00	\$ -
EQUITY			
31-3130090-01-01 Working Capital	\$ 70,192.89	\$ 67,600.89	\$ 2,592.00



Balance Sheet - Comparative - Operating

Lansdowne Woods of VA Comm Assoc, LLC

End Date: 05/31/2026

	Current Balance at 5/31/2026	Prior Month Balance at 04/30/2026	Change
31-3210030-00-00 Retained Earnings Operating Fnd	296,003.39	296,003.39	-
Total EQUITY:	\$ 366,196.28	\$ 363,604.28	\$ 2,592.00
EQUITY			
33-3130060-02-02 PY-Capital Reserve Fund	\$ 953,691.26	\$ 953,691.26	\$ -
33-3130061-02-02 Current Year RR Contributions	225,905.00	180,724.00	45,181.00
33-3130062-02-02 Current Year RR Expenditures	(57,006.43)	(22,651.04)	(34,355.39)
33-3130063-02-02 Current Year RR Interest	16,217.06	12,842.82	3,374.24
Total EQUITY:	\$ 1,138,806.89	\$ 1,124,607.04	\$ 14,199.85
Net Income / (Loss)	\$ 1,821.01	\$ (27,168.87)	\$ 28,989.88
Total Liabilities & Equity:	\$ 1,657,249.47	\$ 1,626,651.92	\$ 30,597.55



Budget Fiscal Year Report

Lansdowne Woods of VA Comm Assoc, LLC

Fiscal Period: May 2026

Account	January	February	March	April	May	June	July	August	September	October	November	December	Projected Total	Budget
OPERATING INCOME														
INCOME														
4110004-00-00 Blue Ridge A	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	51,624.00	619,488.00	\$619,488.00
4110005-00-00 Magnolias As	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	36,072.00	432,864.00	\$432,864.00
4110006-00-00 Potomac Rid	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	49,680.00	596,160.00	\$596,160.00
4110007-00-00 Riverbend As	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	49,464.00	593,568.00	\$593,568.00
4110008-00-00 Riverview Ass	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	52,056.00	624,672.00	\$624,672.00
4110009-00-00 Overlook Ass	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	1,512.00	18,144.00	\$18,144.00
4110010-00-00 Vistas at Lan	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	25,920.00	311,040.00	\$311,040.00
Total INCOME	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	266,328.00	3,195,936.00	\$3,195,936.00
OTHER INCOME														
4240000-00-00 Stores and C	1,100.00	850.00	1,125.00	2,525.00	2,525.00	1,025.00	1,025.00	1,025.00	1,025.00	1,025.00	1,025.00	1,025.00	15,300.00	\$12,300.00
4413000-00-00 Interest Incom	3,208.08	2,915.36	3,346.03	3,373.35	3,374.24	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	42,467.06	\$45,000.00
4415000-00-00 Interest - Ope	1,308.22	1,135.04	1,123.50	1,129.21	920.38	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	16,116.35	\$18,000.00
4990000-00-00 Miscellaneou	1,194.07	110.55	55.00	76.00	251.69	250.00	250.00	250.00	250.00	250.00	250.00	250.00	3,437.31	\$3,000.00
4990220-00-00 Resale Pack	2,069.29	376.03	1,472.63	2,144.99	381.73	1,583.33	1,583.33	1,583.33	1,583.33	1,583.33	1,583.33	1,583.37	17,528.02	\$19,000.00
Total OTHER INCOME	8,879.66	5,386.98	7,122.16	9,248.55	7,453.04	8,108.33	8,108.33	8,108.33	8,108.33	8,108.33	8,108.33	8,108.37	94,848.74	\$97,300.00
ACTIVITIES INCOME														
4990014-00-00 Activities Inco	4,203.00	4,015.00	2,761.00	7,849.25	10,431.00	3,333.33	3,333.33	3,333.33	3,333.33	3,333.33	3,333.33	3,333.37	52,592.60	\$40,000.00
4990015-00-00 Activities Inco	4,075.00	1,200.00	3,575.00	3,800.00	4,225.00	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.63	37,291.65	\$35,000.00
4990016-00-00 Activities Inco	5,285.00	2,088.00	2,197.00	3,955.00	4,592.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	44,367.00	\$45,000.00
Total ACTIVITIES INCOME	13,563.00	7,303.00	8,533.00	15,604.25	19,248.00	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00	134,251.25	\$120,000.00
Total OPERATING	288,770.66	279,017.98	281,983.16	291,180.80	293,029.04	284,436.33	284,436.33	284,436.33	284,436.33	284,436.33	284,436.33	284,436.37	3,425,035.99	\$3,413,236.00
OPERATING EXPENSE														
ACTIVITIES EXPENSES														
5301003-00-00 Activities Exp	6,004.23	5,422.10	2,038.21	6,278.24	5,004.10	4,166.67	4,166.67	4,166.67	4,166.67	4,166.67	4,166.67	4,166.63	53,913.53	\$50,000.00
5301004-00-00 Activities Exp	908.19	890.59	3,190.20	1,380.92	2,149.71	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.63	28,936.26	\$35,000.00
5301005-00-00 Activities Exp	5,840.00	382.80	3,564.20	5,560.00	4,187.24	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	45,784.24	\$45,000.00
Total ACTIVITIES EXPENSES	12,752.42	6,695.49	8,792.61	13,219.16	11,341.05	10,833.34	10,833.34	10,833.34	10,833.34	10,833.34	10,833.34	10,833.26	128,634.03	\$130,000.00
UTILITIES														
5360000-00-00 Telephone an	799.21	768.28	446.97	801.23	858.13	800.00	800.00	800.00	800.00	800.00	800.00	800.00	9,273.82	\$9,600.00
5360100-00-00 Cable Expen	1,116.12	1,116.12	1,112.86	1,112.86	1,560.53	1,139.58	1,139.58	1,139.58	1,139.58	1,139.58	1,139.58	1,139.62	13,995.59	\$13,675.00
5450000-00-00 Electricity	5,672.43	7,038.75	5,738.09	5,717.69	5,460.03	8,000.00	8,000.00	8,000.00	6,250.00	6,250.00	5,500.00	5,500.00	77,126.99	\$76,000.00
5451000-00-00 Water	1,202.31	1,097.10	1,214.65	1,175.47	3,126.23	2,075.00	2,575.00	2,575.00	2,575.00	2,075.00	1,925.00	1,675.00	23,290.76	\$23,000.00
5452000-00-00 Gas	4,318.15	6,232.72	5,512.20	1,892.45	1,876.84	2,500.00	2,500.00	2,500.00	2,450.00	2,500.00	3,300.00	3,500.00	39,082.36	\$37,000.00



Budget Fiscal Year Report

Lansdowne Woods of VA Comm Assoc, LLC

Fiscal Period: May 2026

Account	January	February	March	April	May	June	July	August	September	October	November	December	Projected Total	Budget
5459130-00-00 Utility Reimb	-	-	-	-	-	-	-	8,000.00	-	-	-	-	8,000.00	\$8,000.00
Total UTILITIES	13,108.22	16,252.97	14,024.77	10,699.70	12,881.76	14,514.58	15,014.58	23,014.58	13,214.58	12,764.58	12,664.58	12,614.62	170,769.52	\$167,275.00
CONTRACTS														
5311130-00-00 IT Support Co	1,984.35	1,546.85	1,765.60	1,932.82	1,493.80	1,541.67	1,541.67	1,541.67	1,541.67	1,541.67	1,541.67	1,541.63	19,515.07	\$18,500.00
5360090-00-00 Web Site	291.93	291.93	912.46	152.60	319.52	216.67	216.67	216.67	216.67	216.67	216.67	216.63	3,485.09	\$2,600.00
5517000-00-00 Janitor and C	7,940.00	7,790.00	7,790.00	7,737.50	7,790.00	8,106.67	8,106.67	8,106.67	8,106.67	8,106.67	8,106.67	8,106.63	95,794.15	\$97,280.00
5519000-00-00 Exterminating	150.00	150.00	660.00	150.00	150.00	233.33	233.33	233.33	233.33	233.33	233.33	233.37	2,893.35	\$2,800.00
5521000-00-00 Window Was	-	-	-	-	-	-	-	-	3,100.00	-	-	-	3,100.00	\$3,100.00
5525000-00-00 Garbage and	464.10	464.10	464.10	486.20	523.77	301.00	301.00	301.00	301.00	301.00	301.00	301.00	4,509.27	\$3,612.00
5530000-00-00 Security Con	40,247.02	36,584.27	40,161.38	38,944.59	42,753.26	40,008.67	40,008.67	40,008.67	40,008.67	40,008.67	40,008.67	40,008.63	478,751.17	\$480,104.00
5537010-00-00 Landscaping	14,023.88	14,023.88	14,023.88	14,023.88	14,023.88	14,023.92	14,023.92	14,023.92	14,023.92	14,023.92	14,023.92	14,023.88	168,286.80	\$168,287.00
5542010-00-00 Door Entry S	395.00	395.00	395.00	395.00	395.00	205.00	205.00	205.00	205.00	205.00	205.00	205.00	3,410.00	\$2,460.00
5542400-00-00 Bus Contract	10,899.17	10,899.17	10,899.17	10,899.17	10,899.17	11,080.83	11,080.83	11,080.83	11,080.83	11,080.83	11,080.83	11,080.87	132,061.70	\$132,970.00
5545000-00-00 Elevator Main	191.77	191.77	191.77	191.77	191.77	183.33	183.33	183.33	183.33	183.33	183.33	183.37	2,242.20	\$2,200.00
5547000-00-00 Swim Pool M	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	10,375.00	124,500.00	\$124,500.00
5548000-00-00 Snow Remov	13,130.37	18,292.98	-	-	-	-	-	-	-	-	-	2,500.00	33,923.35	\$25,000.00
Total CONTRACTS	100,092.59	101,004.95	87,638.36	85,288.53	88,915.17	86,276.09	86,276.09	86,276.09	89,376.09	86,276.09	86,276.09	88,776.01	1,072,472.15	\$1,063,413.00
REPAIR & MAINTENANCE														
5390250-00-00 Plants, Flowe	-	-	-	-	-	41.67	41.67	41.67	41.67	41.67	41.67	41.63	291.65	\$500.00
5420000-00-00 Fuel Oil/Coal	745.81	851.25	923.63	945.19	1,042.24	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	11,508.12	\$12,000.00
5515000-00-00 Janitor and C	393.37	359.76	1,628.29	1,846.91	540.35	1,125.00	1,125.00	1,125.00	1,125.00	1,125.00	1,125.00	1,125.00	12,643.68	\$13,500.00
5518000-00-00 Uniforms	-	-	185.49	-	-	83.33	83.33	83.33	83.33	83.33	83.33	83.37	768.84	\$1,000.00
5531030-00-00 Life Safety E	45.00	45.00	45.00	45.00	45.00	416.67	416.67	416.67	416.67	416.67	416.67	416.63	3,141.65	\$5,000.00
5537096-00-00 Grounds Non	(4,415.07)	4,592.08	1,398.12	-	558.43	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	19,633.56	\$30,000.00
5537101-00-00 Tree Mainten	-	-	-	-	-	1,666.67	1,666.67	1,666.67	1,666.67	1,666.67	1,666.67	1,666.63	11,666.65	\$20,000.00
5541003-00-00 Repairs-HVA	328.69	-	-	86.80	-	333.33	333.33	333.33	333.33	333.33	333.33	333.37	2,748.84	\$4,000.00
5541006-00-00 Repairs-Elec	146.23	-	-	-	8.44	166.67	166.67	166.67	166.67	166.67	166.67	166.63	1,321.32	\$2,000.00
5541043-00-00 Exercise Equ	-	-	660.97	-	-	166.67	166.67	166.67	166.67	166.67	166.67	166.63	1,827.62	\$2,000.00
5541050-00-00 Repairs-Plum	398.21	528.46	706.49	260.88	8.96	166.67	166.67	166.67	166.67	166.67	166.67	166.63	3,069.65	\$2,000.00
5541052-00-00 Lighting Supp	-	-	356.75	127.07	120.70	166.67	166.67	166.67	166.67	166.67	166.67	166.63	1,771.17	\$2,000.00
5541230-00-00 Maintenance	-	60.06	384.66	-	53.34	83.33	83.33	83.33	83.33	83.33	83.33	83.37	1,081.41	\$1,000.00
5541351-00-00 Audio-Visual	-	93.50	-	-	-	41.67	41.67	41.67	41.67	41.67	41.67	41.63	385.15	\$500.00
5541352-00-00 Ballroom R&	-	-	-	-	-	41.67	41.67	41.67	41.67	41.67	41.67	41.63	291.65	\$500.00
5541353-00-00 Fountain R&M	-	-	-	-	-	125.00	125.00	125.00	125.00	125.00	125.00	125.00	875.00	\$1,500.00
5541440-00-00 Carpets & Flo	3,420.00	-	-	-	-	233.33	233.33	233.33	233.33	233.33	233.33	233.37	5,053.35	\$2,800.00
5541750-00-00 Irrigation Rep	-	-	-	56.72	2,478.80	416.67	416.67	416.67	416.67	416.67	416.67	416.63	5,452.17	\$5,000.00
5542211-00-00 Locks & Keys	36.88	2,632.79	-	74.10	30.94	125.00	125.00	125.00	125.00	125.00	125.00	125.00	3,649.71	\$1,500.00



Budget Fiscal Year Report

Lansdowne Woods of VA Comm Assoc, LLC

Fiscal Period: May 2026

Account	January	February	March	April	May	June	July	August	September	October	November	December	Projected Total	Budget
5547021-00-00 Pool Supplies	-	-	-	57.34	-	83.33	83.33	83.33	83.33	83.33	83.33	83.37	640.69	\$1,000.00
5547025-00-00 Pool Repairs	897.40	351.77	4,024.97	2,938.17	65.72	250.00	250.00	250.00	250.00	250.00	250.00	250.00	10,028.03	\$3,000.00
5562020-00-00 Painting	34.70	196.49	166.32	402.62	365.40	41.67	41.67	41.67	41.67	41.67	41.67	41.63	1,457.18	\$500.00
5570001-00-00 Vehicle Main	-	8.99	-	2,028.09	-	41.67	41.67	41.67	41.67	41.67	41.67	41.63	2,328.73	\$500.00
5590000-00-00 Misc Operatin	130.31	-	463.63	496.80	779.40	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	8,870.14	\$12,000.00
5590230-00-00 Tennis Expen	-	56.29	1,063.02	-	-	62.50	62.50	62.50	62.50	62.50	62.50	62.50	1,556.81	\$750.00
5620000-00-00 Restaurant E	-	-	8,150.00	3,810.00	-	83.33	83.33	83.33	83.33	83.33	83.33	83.37	12,543.35	\$1,000.00
Total REPAIR & MAINTENANCE	2,161.53	9,776.44	20,157.34	13,175.69	6,097.72	10,462.52	10,462.52	10,462.52	10,462.52	10,462.52	10,462.52	10,462.28	124,606.12	\$125,550.00
PERSONNEL														
5310000-00-00 S&W - Admin	42,829.74	42,521.87	39,058.66	62,531.43	40,730.21	43,874.96	43,874.96	43,874.96	65,812.44	43,874.96	43,874.96	65,812.44	578,671.59	\$592,312.00
5310060-00-00 S&W - Engin	16,916.69	20,240.58	16,888.69	24,591.40	16,927.59	17,016.15	17,016.15	17,016.15	25,524.22	17,016.15	17,016.15	25,524.21	231,694.13	\$229,718.00
5711000-00-00 Payroll Taxes	6,574.01	5,703.48	4,414.74	6,858.09	4,416.32	4,837.41	4,837.41	4,837.41	7,256.11	4,837.41	4,837.40	7,256.10	66,665.89	\$65,305.00
5712000-00-00 Payroll Proce	1,009.07	988.40	1,097.75	1,490.77	1,004.29	963.38	963.38	963.38	1,445.09	963.39	963.39	963.39	12,815.68	\$12,524.00
5721001-00-00 Group Insura	11,268.15	11,268.15	10,005.18	10,991.17	11,727.07	11,654.85	11,654.85	11,654.85	17,482.26	11,654.84	11,654.84	11,654.84	142,671.05	\$151,513.00
5722000-00-00 Worker's Com	769.74	856.30	737.96	1,121.46	756.10	734.22	734.22	734.22	1,101.34	734.22	734.22	1,101.34	10,115.34	\$9,912.00
5723001-00-00 Benefits	1,335.41	1,403.14	1,133.79	1,694.12	1,101.68	1,810.74	1,810.74	1,810.74	2,716.11	1,810.74	1,810.74	2,716.12	21,154.07	\$24,445.00
Total PERSONNEL	80,702.81	82,981.92	73,336.77	109,278.44	76,663.26	80,891.71	80,891.71	80,891.71	121,337.57	80,891.71	80,891.70	115,028.44	1,063,787.75	\$1,085,729.00
ADMINISTRATIVE EXPENSES														
5210000-00-00 Advertising	1,050.85	(42.30)	-	-	-	83.33	83.33	83.33	83.33	83.33	83.33	83.37	1,591.90	\$1,000.00
5311000-00-00 Office Supplie	-	466.52	-	497.50	145.35	250.00	250.00	250.00	250.00	250.00	250.00	250.00	2,859.37	\$3,000.00
5311010-00-00 Printing	1,786.37	416.96	90.30	-	-	416.67	416.67	416.67	416.67	416.67	416.67	416.63	5,210.28	\$5,000.00
5311012-00-00 Coffee & Wat	87.17	87.17	96.25	253.75	130.75	166.67	166.67	166.67	166.67	166.67	166.67	166.63	1,821.74	\$2,000.00
5311030-00-00 Copier Lease	295.74	295.74	981.86	315.74	315.74	583.33	583.33	583.33	583.33	583.33	583.33	583.37	6,288.17	\$7,000.00
5311050-00-00 Postage	-	-	-	-	-	12.50	12.50	12.50	12.50	12.50	12.50	12.50	87.50	\$150.00
5311070-00-00 Office Equipm	-	-	36.97	141.80	86.02	83.33	83.33	83.33	83.33	83.33	83.33	83.37	848.14	\$1,000.00
5320000-00-00 Management	6,406.86	6,406.86	6,406.86	6,406.86	6,406.86	6,361.00	6,361.00	6,361.00	6,361.00	6,361.00	6,361.00	6,361.00	76,561.30	\$76,332.00
5320030-00-00 Management	-	52.44	60.22	70.68	68.00	41.67	41.67	41.67	41.67	41.67	41.67	41.63	542.99	\$500.00
5340000-00-00 Legal Expens	4,519.00	9,060.50	4,572.50	9,029.00	2,142.50	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.63	49,740.15	\$35,000.00
5341000-00-00 Licenses & F	146.67	615.50	381.09	51.09	1,307.18	833.33	833.33	833.33	833.33	833.33	833.33	833.37	8,334.88	\$10,000.00
5350000-00-00 Audit Expens	-	-	-	9,100.00	-	-	-	-	-	-	-	-	9,100.00	\$9,100.00
5360050-00-00 Communicat	2,503.17	2,503.17	2,503.17	2,503.17	2,503.17	2,708.33	2,708.33	2,708.33	2,708.33	2,708.33	2,708.33	2,708.37	31,474.20	\$32,500.00
5390000-00-00 Misc Adminis	144.86	302.43	9.65	257.29	18.01	333.33	333.33	333.33	333.33	333.33	333.33	333.37	3,065.59	\$4,000.00
5390900-00-00 Misc Exp - N	778.05	-	1,556.10	-	1,556.10	750.00	750.00	750.00	750.00	750.00	750.00	750.00	9,140.25	\$9,000.00
5391000-00-00 Dues & Subs	-	289.50	72.00	121.60	-	208.33	208.33	208.33	208.33	208.33	208.33	208.37	1,941.45	\$2,500.00
5394010-00-00 Professional	134.16	410.80	359.44	1,495.00	466.00	416.67	416.67	416.67	416.67	416.67	416.67	416.63	5,782.05	\$5,000.00
Total ADMINISTRATIVE EXPENSES	17,852.90	20,865.29	17,126.41	30,243.48	15,145.68	16,165.16	16,165.16	16,165.16	16,165.16	16,165.16	16,165.16	16,165.24	214,389.96	\$203,082.00
TAXES & INSURANCE														



Budget Fiscal Year Report

Lansdowne Woods of VA Comm Assoc, LLC

Fiscal Period: May 2026

Account	January	February	March	April	May	June	July	August	September	October	November	December	Projected Total	Budget
5312200-00-00 Income Taxe	(1,021.00)	-	-	10,800.00	-	3,750.00	-	-	3,750.00	-	-	3,750.00	21,029.00	\$15,000.00
5718020-00-00 Personal Pro	-	-	-	139.05	87.33	200.00	-	-	200.00	-	-	-	626.38	\$600.00
5720000-00-00 Property & Li	4,521.77	4,182.13	4,351.95	4,351.96	4,351.95	2,951.25	2,951.25	2,951.25	2,951.25	2,951.25	2,951.25	2,951.25	42,418.51	\$35,415.00
Total TAXES & INSURANCE	3,500.77	4,182.13	4,351.95	15,291.01	4,439.28	6,901.25	2,951.25	2,951.25	6,901.25	2,951.25	2,951.25	6,701.25	64,073.89	\$51,015.00
FUND TRANSFERS														
9901015-00-00 Reserve Con	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	45,181.00	542,172.00	\$542,172.00
9901025-00-00 Reserve Con	3,208.08	2,915.36	3,346.03	3,373.35	3,374.24	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	42,467.06	\$45,000.00
Total FUND TRANSFERS	48,389.08	48,096.36	48,527.03	48,554.35	48,555.24	48,931.00	48,931.00	48,931.00	48,931.00	48,931.00	48,931.00	48,931.00	584,639.06	\$587,172.00
Total OPERATING	278,560.32	289,855.55	273,955.24	325,750.36	264,039.16	274,975.65	271,525.65	279,525.65	317,221.51	269,275.65	269,175.64	309,512.10	3,423,372.48	\$3,413,236.00
Net Income:	10,210.34	(10,837.57)	8,027.92	(34,569.56)	28,989.88	9,460.68	12,910.68	4,910.68	(32,785.18)	15,160.68	15,260.69	(25,075.73)	1,663.51	\$0.00

Lansdowne Woods of Virginia Community Association, LLC
Activities Committee Meeting Minutes
May 8, 2026, 11 a.m., Theater

Present: Peggy King, Joline Matheson, Linda Rowe, Didem Maurice, Mary Ferney, Ruth Smale, Sally Hoke, Joanne Mansuetto

Absent: Kitty Messner

Others present: Donaliece Carey, Activities Director, Mary Brennan, Trips Coordinator

Call to Order: 11 a.m.

April meeting minutes approved as presented.

Agenda adopted as presented.

Open Forum on agenda items

- None

Correspondence

- 4/14 email from Marina Rota with suggestion for Grandparents Day event. Committee discussed and commented most residents with grandchildren in the area attend their sporting events, and that previous family events like Santa in the Clubhouse were not well attended.

Old Business

- Kentucky Derby event was discussed. Committee discussed ways to grow this fun event next year.

New Business

- Ideas from the committee:
 - Mediterranean dinner with a belly dancer for entertainment
 - Drug Take-Back
 - Watch sports finals, e.g. soccer
- Joline, Linda, Didem, and Mary volunteered to be ushers for the Memorial Day program.

Pipeline – working calendar:

- 5/2 Kentucky Derby Party
- 5/5 & 19 Loudoun County Library Outreach
- 5/5 & 12 Painting for a Cause with Ligia Inra
- 5/5, 13, 20, & 27 Laura Nickle plays in the Fireside Lounge
- 5/7 TWK with Fairfax Jubil-Aires
- 5/9 Dance Party with Crosscut Saw band
- 5/11 New Resident Clubhouse Tour
- 5/11 Movie “Grumpy Old Men”
- 5/13 Trip: National Gallery of Art
- 5/13 Community Shred Event
- 5/14 TWK with Bingo Gigolos

- 5/15 AARP Driver Safety Class
- 5/20 Worlds Okayest Trivia
- 5/23 Tech Help with Nikitha Karthik
- 5/25 Memorial Day Program
- 5/27 Trip: Occoquan
- 5/28 Puzzle Showdown
- 5/29 Scam Prevention Seminar by LoCo Sheriff's Office
- 6/4 Community Dinner with Fountain Grill
- 6/5 Annual Lansdowne Woods Health & Wellness Fair
- 6/11 TWK with The Pop Chicks
- 6/17 Worlds Okayest Trivia
- 6/18 TWK with Scott Hetz Clark (waiting on confirmation)
- 6/25 TWK with ?????
- 6/24 Resident Cabaret
- 6/27 Annual Literary Festival
- 7/23 Loudoun Jazz Ensemble Dance Party
- 10/15 TWK with Bingo Gigolos
- 11/11 Veterans Day Program
- 11/12 Randy Riggle (with Veterans tribute)
- 11/19 Gladius – Flamenco guitarist
- 12/31 NYE event

Open Forum: NONE

Adjourn: 11:48 a.m.

Next Meeting: Friday, June 12, 11 a.m., Theater

Lansdowne Woods of Virginia Community Association, LLC
Activities Committee Meeting Minutes
June 12, 2026, 11 a.m., Theater

Present: Peggy King, Joline Matheson, Linda Rowe, Mary Ferney, Kitty Messner, Joanne Mansuetto

Absent: Mary Swayhoeover, Ruth Smale, Sally Hoke

Others present: Donaliece Carey, Activities Director, Mary Brennan, Trips Coordinator

Call to Order: 11 a.m.

May meeting minutes approved as presented.

Agenda adopted as presented.

Open Forum on agenda items

- None

Correspondence

- 6/10 email from Didem Maurice resigning from the Activities Committee. The committee thanked Didem for her service and noted that she would continue to volunteer for events when she is in town.

Old Business

- NYE: the committee will move forward with catering by Fountain Grill regardless of status of negotiations.
- Memorial Day was reviewed. The committee requested for space (particular area) be left free of chairs for walkers, scooters, etc. The committee would also like lanyard style name badges to identify them as volunteers.

New Business

- Ideas from the committee:
 - US Army Museum at Ft. Belvoir
 - Museum of Shenandoah Valley
- Volunteer recognition discussed. Event will be held in November or December with a light lunch with email invites sent to board and committee members, group leaders, etc.

Pipeline – working calendar:

- 6/2 & 16 Loudoun County Library Outreach
- 6/2 & 9 Painting for a Cause with Ligia
- 6/3, 10, & 17 Laura Nickle plays in the Fireside Lounge
- 6/4 Community Dinner with Fountain Grill
- 6/5 Annual Lansdowne Woods Health & Wellness Fair
- 6/6 & 13 Tech Help with Nikitha Karthik
- 6/8 New Resident Clubhouse Tour
- 6/8 Movie: “Driving Miss Daisy”
- 6/10 Revolutionary Row, Middlebury Winery Tour

- 6/11 PT Solutions, H&W Classroom
- 6/11 TWK with The Pop Chicks
- 6/16 Bankers Life, H&W Classroom
- 6/17 Worlds Okayest Trivia
- 6/18 Empower Mobility, H&W Classroom
- 6/18 TWK with The Greek and The Freak
- 6/24 “Guys and Dolls” Shenandoah University Theatre
- 6/24 “Made in the USA: A Lansdowne Woods Tribute to American-made Music”
- 6/25 Must Love Travel, H&W Classroom
- 6/27 Annual Literary Festival
- 7/8 US Capitol Tour
- 7/9 H&W Classroom
- 7/16 H&W Classroom
- 7/19 “Beetlejuice” National Theater
- 7/23 H&W Classroom
- 7/23 Loudoun Jazz Ensemble Dance Party
- 7/30 H&W Classroom
- 9/8 EMT interaction skill set
- 9/18 or 25 TWK with Joe Dockery
- 10/8 TWK with Rhythm Road
- 10/15 TWK with Bingo Gigolos
- 11/11 Veterans Day Program
- 11/12 Randy Riggle (with Veterans tribute)
- 11/19 Gladius – Flamenco guitarist
- 12/2 Maranatha Youth Music Academy Choir & Orchestra
- 12/31 NYE event

Open Forum: NONE

Adjourn: 11:40 a.m.

Next Meeting: Friday, July 10, 11 a.m., Theater

**LANSLOWNE WOODS OF VIRGINIA
BUILDING & GROUNDS COMMITTEE**

April 9, 2026 Meeting Minutes

Present: Marie Gay (Chair), Joe Gibson (Vice Chair), Charles Fritts (Recorder); Sandra Hughes, Tom Landucci, Anna Marie Mason, MaryAnn Muller-Davis, Barry Perlow, Bill West, Tuck Williams

Absent: Karen Hermansen, Jack Hoke

From Management: Manager, Audra Reed; Assistant Manager, Susie Pfefferkorn; Chief Engineer, Dondi Searfoss

Call to Order: Marie Gay called the meeting to order at 10:00 am

Adoption of the Agenda: Motion to approve the agenda was made by Joe Gibson, seconded by MaryAnn Muller-Davis. Approved.

Minutes for March 19, 2026 B&G Meeting:

A motion to approve minutes was made by MaryAnn Muller-Davis, seconded by Joe Gibson. Approved.

Chairperson's Comments: Marie suggested that everyone should get out and enjoy the wildflowers.

Resident Comments on Agenda: A unit owner stated that the proposal by Yellowstone for the hillside behind Magnolias East was the wrong thing to do. He recommended doing the job with steel-bladed weed whackers. A unit owner recommended that the silver grass on the hillside be removed and replaced with native grasses.

Engineer's Report:

Updates from the Chief Engineer's report were accepted and all questions were answered. Dondi reported that the irrigation repairs were complete.

Management Report:

The Manager's Report was included in the B&G package. The HVAC system in the fitness studio has been replaced. Management reported that Yellowstone is continuing with the scheduled seasonal work (mowing, edging, mulching). The long bed and perennial/annuals are scheduled for the end of the month, beginning of May.

Old Business:

- A. The matter of the hillside behind Magnolias East was debated. It was not clear to the Committee what was the best course of action. It was also unclear to the Committee exactly what Yellowstone's proposal entailed.
- B. The following motion was made by Joe Gibson and seconded by MaryAnn Muller-Davis. It failed by a vote of 2 Yes to 8 No. "Move that the Building and Grounds Committee support management's recommendation to proceed with the proposal from Yellowstone Landscape to clean up the areas behind Magnolias East, with the expectation that this maintenance will be performed once per year."
- C. The Committee recommended that Management obtain a more precise proposal from Yellowstone that could lead to a long-term landscape plan.

New Business: None.

Open Forum: None

Motion to Adjourn at 11:10 AM. Motion by Joe Gibson, second by MaryAnn Muller-Davis. Approved.

**LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC
BUILDING & GROUNDS COMMITTEE**

MINUTES OF JUNE 11, 2026

Present: Marie Gay (Chair), Joe Gibson (Vice Chair), Charles Fritts (Recorder); Sandra Hughes, Tom Landucci, Anna Marie Mason, MaryAnn Muller-Davis, Barry Perlow, Tuck Williams

Absent: Karen Hermansen, Jack Hoke, Bill West

From Management: Manager, Audra Reed; Assistant Manager, Susie Pfefferkorn; Chief Engineer, Dondi Searfoss

Recorder: This meeting's minutes are recorded by Charles Fritts.

Call to Order: Marie Gay called the meeting to order at 10:00 am

Adoption of the Agenda: **Motion to approve** was made by Joe Gibson, seconded by Tuck Williams and unanimously approved.

Minutes for April 9, 2026, B&G Meeting: **Motion to approve minutes** was made by Tom Landucci, seconded by Anna Marie Mason and unanimously approved.

Chairperson's Comments: Marie Gay told a story about her birdhouses.

Resident Comments on Agenda: Pat Dunham spoke about the garden plots being rented. The number rented is higher than last year.

A member commented on the Yellowstone proposal and wanted to see the other proposals. The packet did not appear to be available on the website. This will be corrected.

Engineer's Report:

Updates from the Chief Engineer's report were accepted and all questions were answered. Dondi made a repair that solved an issue with grit/sand in the pool. MaryAnn Muller-Davis asked about the fountain pump running when the water is low. It is not a problem.

Management Report:

There was a discussion about several trees that were taken down behind the Magnolias without approval. At this time Management is not aware of who is responsible for the unauthorized removal. Riverbend will have the additional handrail installed in its front lot. Riverbend will be responsible for the full payment. Both Potomac Ridge and Riverview front landscaping has been completed. There are a few additional plantings that are needed at Potomac Ridge; these will be completed in the Fall. Trail maintenance has been completed to include weed whacking, limbing of trees, and overall cleanup.

Old Business: The matter of the hillside behind Magnolias East was discussed. A proposal from Yellowstone includes mowing down the middle section of the hillside area, with removal of all saplings up to 3 inches in diameter, and brush to be cut to ground level. Invasive trees and plants will be cut to ground level and resulting debris removed. Invasives include Chinese silver grass,

Bradford pear, autumn olive, Japanese honeysuckle, ash tree, select black locust trees, and thorned berry vines. **Motion to recommend the BOM approval of the Yellowstone Landscape proposal in the amount of \$3,700 and authorize management to schedule the work for the fall 2026. Moved by MaryAnn Muller-Davis, seconded by Tom Landucci. Approved by a vote of 6 Yes, 2 No (Fritts, Gibson), 1 Abstention (Mason).**

New Business:

- A. Architectural Design Review PR Unit 118. **Motion that the BOM approve the request submitted by the owner of Potomac Ridge Unit 118 to install bluestone steppingstones within their Limited Common Element yard appurtenant to the unit, in accordance with the plans submitted with the application. Motion to approve by Joe Gibson, seconded by Tuck Williams. Approved Unanimously.**
- B. Garden Plots Retimbering Project (Section behind Potomac Ridge) **Motion to recommend to the BOM approval of the proposal from David RR Construction for the retimbering of the garden plots behind Potomac Ridge, with work to be completed in Fall 2026 by Tom Landucci, seconded by MaryAnn Muller-Davis. The Motion was approved by a vote of 7 yes, 2 No (Fritts, Williams).**

Open Forum: A unit owner express concern about the upkeep of the maintenance shed. Management addressed her concern explaining that a majority of the items have been removed and that there are plans to remove the remaining piles of rock, dirt, etc.

Motion to Adjourn at 11:10 AM. Motion by Joe Gibson, second by Maryann Muller-Davis. Approved.

Next Regular Meeting: THURSDAY, July 9, 2026, at 10 a.m. in the Auditorium.

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC
BUDGET & FINANCE COMMITTEE MEETING
Minutes of May 26, 2026

Members Present:, Barry Riordan, Lyn Laparan (via zoom) Virginia Ward, Paul Dunham, Pete Whitmore, Robert Lowry and Victoria Wagner

Others Present: Audra Reed, General Manager; Susie Pfefferkorn, Assistant General Manager; and Cathy Williams, Finance Manager

Absent: David Saine (Treasurer), Bill Thomas, Marcelo Moraes, and Bob Higgins

Call to Order: Barry Riordan called the meeting to order at 10:03 a.m.

Adoption of Agenda: The agenda was approved as presented. Moved by Victoria Wagner and seconded by Robert Lowry. Vote: unanimous.

Minutes: Minutes of April 28, 2026, regular meeting were approved as presented. Moved by Virginia Ward and seconded by Pete Whitmore. Vote: unanimous

Resident Comments on Agenda Items: Marina Rota spoke concerning the financial statements and Reserves.

Chairperson's Comments: None

Report of the Treasurer: Barry Riordan reported on the balance of the reserve funds. The report follows.

Management Comments:

- Audra gave an update on the employee benefits package. The increase will be 4.5%. The 2026 budget anticipated 15%.
- There will be potential restaurant expenses (mostly replacement reserves) should an agreement with the restaurant operator be accepted/formalized.
- The first draft of the reserve study is expected by June 1. The first meeting to review the draft is scheduled for 10 am on June 9 in the Club Room.

Review of the April 2026 Financial Statements: The committee reviewed the statements. A list of repair and maintenance expenses will be reviewed for possible reclassification to replacement reserves.

Building & Grounds Committee Updates: There was no May meeting.

Unfinished Business: None

New Business:

Draft 2025 Audited Financial Statements:

It was moved by Barry Riordan and seconded by Robert Lowry to recommend that the Board of Members accept the audited financial statements for the fiscal year ended December 31, 2025, as prepared by Daly, Hamad & Associates, P.L.L.C, subject to any final minor revisions, formatting

corrections, completion of remaining audit procedures, and issuance of the final signed audit report. Vote: unanimous.

Open Forum: None

Adjourn: Victoria Wagner moved and Pete Whitmore seconded that the meeting be adjourned at 10:35 a.m.

Next Meeting: Tuesday, June 23, at 10 a.m.

Treasurer's Report
April 30, 2026

Replacement Reserves total: \$ 1,085,053
Money Market: \$ 302,660

Operating Reserves and Working Capital total: \$357,447
Money Market: \$ 80,995

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC
BUDGET & FINANCE COMMITTEE MEETING
Minutes of June 23, 2026

Members Present:, Barry Riordan, Lyn Lapanan (via zoom) Virginia Ward, Paul Dunham, Bill Thomas, Marcelo Moraes, Robert Lowry and Victoria Wagner

Others Present: Audra Reed, General Manager; Susie Pfefferkorn, Assistant General Manager; and Cathy Williams, Finance Manager

Absent: David Saine (Treasurer), Pete Whitmore, and Bob Higgins

Call to Order: Barry Riordan called the meeting to order at 10:05 a.m.

Adoption of Agenda: The agenda was approved as presented. Moved by Victoria Wagner and seconded by Virginia Ward. Vote: unanimous.

Minutes: Minutes of May 26, 2026, regular meeting were approved as amended. Moved by Bill Thomas and seconded by Paul Dunham. Vote: unanimous

Resident Comments on Agenda Items: None

Chairperson's Comments: Barry commented on the importance of the upcoming budget meetings and asked members to try and attend.

Report of the Treasurer: The report was included in the packet.

Management Comments:

- The first draft of the Replacement Reserve study has been received and the first meeting to review the draft is on Thursday, June 25 at 10 a.m.
- A new policy resolution for the underground utility infrastructure has been drafted and will be reviewed at the upcoming Board meeting.
- The Magnolias' hillside clean-up (\$3,700) will take place this fall. Yellowstone will add to their yearly contract.
- The Board will consider the results of the recent shuttle bus survey at their upcoming meeting.
- Negotiations with prospective restaurant operators continue.
- Be aware of recent email scams. Do not pay anything on behalf of the association.
- Draft #1 of the 2027 budget will be presented at the July 28 B&F Committee meeting.

Review of the May 2026 Financial Statements: The committee reviewed the statements. The association is currently running a small surplus which is \$1,700 favorable to the budget.

Building & Grounds Committee Updates: The minutes of the June meeting were included in the packet.

Unfinished Business:

Reclassifying Maintenance Expense to Replacement Reserve Expense: Bill Thomas moved and Paul Dunham seconded to reclassify the sport court windscreen expense of \$965.50 from operating expenses to replacement reserves. Vote: unanimous.

New Business:

Funding for Garden Plots Retimbering Project:

It was moved by Barry Riordan and seconded by Bill Thomas to recommend that the Board of Members approve funding the garden plots retimbering project behind Potomac Ridge, in the amount of \$17,360, as a replacement reserve expenditure. Vote: 2 “abstain” and 6 “in favor”

Review Proposed Changes to Policy Resolution #20 – Reserves for Capital Components:
Tabled.

Open Forum: A resident spoke on the shuttle service.

Adjourn: Robert Lowry moved and Victoria Wagner seconded that the meeting be adjourned at 11:14 a.m.

Next Meeting: Tuesday, July 28, at 10 a.m.

**Lansdowne Woods of Virginia Communications Committee Meeting
Minutes of May 8, 2026, 1:30 p.m., Theater**

Present: Kathleen Hughes, Maria Kelly, Brenda Coker, Sarah Wilton, Audrey Tennant, Oritta Essien, Dave Kennelly

Others Present: Donaliece Carey, Director of Community Activities, Mary Brennan, Trips Coordinator

Call to Order: 1:30 p.m.

April meeting minutes approved.

Agenda adopted

Open Forum on agenda items: None

Correspondence

- None

Old business

- None

New business

- Discussion regarding Lansdowne Woods closed Facebook groups: Lansdowne Woods, Living in Lansdowne Woods, Lansdowne Woods Discussion Group. Trademarked name, misinformation, etc. discussed. Committee does not think we need a policy resolution, but rather to ask the three groups to not use the community's name.
- May newsletter reviewed. The committee agreed it was interesting and well done.
- Connector redesign revisit. No suggestions.
- June newsletter articles confirmed:
 - President's message – Wayne
 - General Manager's message – Audra
 - Employee spotlight -management office
 - Article about Fountain Grill coming to LWVA – Tony Cotter/Fred Bishopp/Kathleen
 - Leesburg Celebrates America's 250th – Sarah Wilton
 - Congratulations to LWVA Chair Volleyball Team – Bill Phillips/Donaliece
- July or later article ideas
 - President's message – Wayne
 - General Manager's message – Audra
 - Vultures (September, National Vulture Day) – Oritta
 - Ida Lee Park – Audrey
 - Golf League and Alan Knittel/non-golfer/volunteered to coordinate - ?
 - Algonkian Park – Maria
 - Day Trip to Rock Creek Park - David

Open Forum: None

Adjourn: 2:25 p.m.

Next meeting: Friday, June 11, 1:30 p.m., Theater

**Lansdowne Woods of Virginia Communications Committee Meeting
Minutes of June 12, 2026, 1:30 p.m., Theater**

Present: Kathleen Hughes, Maria Kelly, Audrey Tennant

Absent: Sarah Wilton, Oritta Essien, David Kennelly

Others Present: Donaliece Carey, Director of Community Activities, Mary Brennan, Trips Coordinator

Call to Order: 1:30 p.m.

May meeting minutes approved.

Agenda adopted as presented

Open Forum on agenda items: None

Correspondence

- None

Old business

- LWVA FB page and closed groups discussed. Committee moved and approved motion: **To identify the LWVA Community FB page as the official page of Lansdowne Woods with FB verification badge.** Moved by Audey Tennant, seconded by Kathleen Hughes, vote unanimous.

New business

- Committee discussed recruitment of new members.
- June newsletter reviewed. The committee agreed it was well done.
- July newsletter articles confirmed:
 - President's message – Wayne
 - General Manager's message – Audra
 - Employee spotlight -management office
 - Day Trip to Rock Creek Park – David
 - Ida Lee Park - Audrey
 - Algonkian Regional Park - Maria
- August or later article ideas
 - President's message – Wayne
 - General Manager's message – Audra
 - Vultures (September, National Vulture Day) – Oritta
 - Day Trip to Skyline Drive - David
 - Golf League and Alan Knittel/non-golfer/volunteered to coordinate - ?
 - 4th of July Roundup – Kathleen
 - Farmers Market - Kathleen
 - Day Trip to Rock Creek Park - David

Open Forum: None

Adjourn: 2:20 p.m.

Next meeting: Friday, June 11, 1:30 p.m., Theater

Lansdowne Woods of Virginia External Communications Work Group Meeting (ECWG)
Minutes of May 20, 2026

I. Call to order: 1:00p.m.

Present: Peggy Hamaker (Chair), Joyce Zink, Neelam Henderson, Donaliece Carey, & Mary Brennan

Absent: Lyn Laparan, Lucy Keller, & Kathleen Hughes.

Residents in Attendance: Kent Hamaker & Paul Dunham

II. Adoption of Agenda: Motioned by Joyce, seconded by Neelam, unanimously approved as amended.

III. Resident Comments on Agenda: None

IV. Correspondence: None

V. Approval of April 15, 2026 Meeting Minutes: Motioned by Neelam, seconded by Joyce, unanimously approved.

VI. UNFINISHED BUSINESS:

- A) **Review of Website Progress and Payment of Invoice #3:** Because the website has undergone a soft launch per the contract with Brand, Invoice #3 is currently in the process of being paid.
- B) **Discussion of Videography Update:** This item was tabled due to Lucy's absence.
- C) **Update of New Resident Survey:** This item was tabled due to Lucy's absence.
- D) **Discussion of possible Website Working Group Formation:** moved under New Business.

VII. NEW BUSINESS:

- A) **BOM Report at June 3rd, 2026 meeting:** Neelam volunteered to deliver the ECWG report to the upcoming BOM meeting.
- B) **(#D) above and ECWG Role post launch of LWVA website:**
 - Now that the website has launched and day-to-day operations are handled by management, ECWG will hold an internal discussion to define its future role, potentially including an auditing function.
 - **Website Group Formation:** Peggy will discuss the formation of the Website Group with management before bringing the proposal to the BOM.
 - **Google Map Integration:** John Brand sent an email confirming that the Google Map has been successfully installed on the website's "Visit Us" page.

- **Google Business Profile Caution:** John Brand reported an increase in random Google Business Profile suspensions in 2026, often triggered by adding too many reviews at once or updating service areas too quickly.
- **Donaliece and Mary** have compiled a list of updates and changes to be made before the **hard launch of the website**. These will be completed by utilizing the 1 hour per month of maintenance (contract) from Brand, then with support from the webmaster as needed. Donaliece will provide an update to ECWG by **May 26** confirming completion status and readiness of for hard launch.
- Mary is coordinating a **training session** with Brand.

C) **"Best in Loudoun" Campaign:** Peggy requested that the group prepare to submit an article for the Connector, Flyers, and Friday e-blast in anticipation of the "Loudoun Now "contest.

VIII. Domain Name Review: Joyce recommended reviewing the 11 domain names currently held and considering reducing the list to three to save on renewal costs.

IX. Residents Open Forum

Resident Query: Paul Dunham asked whether the website had been tested across multiple platforms (iPhones, iPads, Samsung devices) and whether any major issues were found.

Response: ECWG confirmed that a group of 10 individuals tested the site thoroughly and identified only minor issues.

X. Adjournment: 1:40 PM, Neelam Motioned and Joyce seconded it, unanimously approved

Next meeting: Wednesday, June 17, 2026, at 1:00 in the Theater Room.

Minutes recorded by:

Neelam Henderson

571-405-0932

**Lansdowne Woods of Virginia External Communications Work Group Meeting (ECWG)
Minutes of June 17, 2026**

I. Call to order: 1:01 p.m.

Present: Peggy Hamaker (Chair), Joyce Zink, Neelam Henderson, Mary Brennan & Lyn Laparan

Absent: Lucy Keller, & Kathleen Hughes.

Residents in Attendance: None

II. Adoption of Agenda: Motioned by Neelam, seconded by Peggy, unanimously approved.

III. Resident Comments on Agenda: None

IV. Correspondence: None

V. Approval of May 20, 2026 Meeting Minutes: Motioned by Neelam, seconded by Peggy, unanimously approved.

VI. UNFINISHED BUSINESS:

- a) **Discussion of Videography Update:** This item was tabled due to Lucy's absence.
- b) **Update of New Resident Survey:** This item was tabled due to Lucy's absence.

VII. NEW BUSINESS: (Post Website Launch)

- a) **Flyer & Lobby Monitors Display:** Peggy to personally inspect each lobby to ensure hardcopy flyers are readily available. (*Note: Lyn has created a simpler, generic version of these flyers for use*).
- b) **Website Promo:** A "friendly reminder" blurb has been prepared for *The Connector* and Friday's email blast. Peggy will follow up on implementation.
- c) **"Most Favorite" Community Award:** Peggy to follow up with the management office regarding the possibility of a Friday e-blast and a posting in *The Connector*.
- d) **The Missing Style Guide:** Joyce to request the "Style Guide" from John Brand, as outlined in note #8 of the November 2025 kickoff notes.
- e) **Advertising Open Houses:** Joyce to consult John Brand regarding the feasibility and cost of pulling automated stats from Realtor.com to display on the public side of the website.
- f) **Spam & Security Diligence:** Joyce to draft a blurb for *The Connector* addressing LWVA new website security measures and educating residents on how to remain diligent against increasingly sophisticated spam.
- g) **Fixing Dead Links (404 Errors):** Joyce to follow up with John Brand after the designated 30-day waiting period. John has agreed to fix the links if the issue persists.
- h) **Google Business Listing:** Joyce is collaborating with Mary to finalize a list of unique community amenities to optimize the LWVA Google listing beyond standard features.

- i) **SEO Stats & Board Reporting:** The ECWG suggests that website analytics—including SEO statistics, resident sign-up numbers, and traffic metrics—should be integrated into Management’s regular report to the Board of Managers (BOM). Consult Management Office
- j) **Evolving to the Next Phase/Committee Restructuring: Context & Call to Action:** Because the new website spans both a highly visual public marketing front and a secure internal resident portal, its scope has outgrown the narrow "Terms of Reference" definitions currently governing the ECWG and other The Communication committee/workgroup. To transition effectively into the next phase, structural evolution is required. **Proposal:** To maintain momentum and avoid operational bottlenecks, the ECWG will discuss the framework for creating or repurposing a specialized **Website Working Group/Committee**, which will later be presented to the BOM.

VIII. Adjournment: 2:23 PM, Neelam Motioned and Joyce seconded it, unanimously approved

Next meeting: Wednesday, July 10th, 2026, at 1:00 in the Theater Room.

Minutes recorded by:

Neelam Henderson

571-405-0932

MEETING MINUTES

POLICY RESOLUTION WORKING GROUP LANSLOWNE WOODS OF VIRGINIA

Tuesday, May 19, 2026

The meeting was held in-person in the Theater.

Present: Member Representatives Barry Berger & Wes Henderson; Mary Ferney (chairperson); General Manager Audra Reed; Assistant Manager Susie Pfefferkorn; Activities Director Donaliece Carey

- I. Call to Order – The meeting was called to order by the chair, Mary Ferney, at 1:00 p.m.
- II. Approval of the Agenda – The agenda was approved.
- III. Approval of Minutes – A motion was made and seconded for the approval of the minutes from the April 21, 2026, PRWG meeting. The motion was unanimously approved.
- IV. Resident Comments on Agenda (agenda items only) – Marie Gay commented on the policy resolution regarding garden plots and made a few suggestions.
- V. Chairperson’s Comments – None
- VI. Old Business
 - A. Reviewed draft changes to Policy Resolutions: #7 (Assignment, Use & Maintenance of Garden Plots), #8 (Reserving, Using & Renting Clubhouse Rooms), #10 (Woodshop and Woodworking Club), #20 (Reserves for Capital Components), #23 (Strategic Planning Group), #31 (Credit Card Policy), and #33 (Purchasing Goods, Procurement of Services, and Competitive Bidding). It was decided that PR #'s 7, 8, 10, 23, 31, 33 will be forwarded to the BOM for final review and approval and #23 will be tabled until management can get clarification from the reserve analyst on whether items valued at \$1,000 or less should be included in the study at \$0 value and paid for with operating funds or if they should be excluded from the study entirely.
 1. PR # 7: Motioned to recommend changes to the BOM made by Henderson, seconded by Berger. Vote: unanimous.
 2. PR # 8: Motioned to recommend changes to the BOM made by Henderson, seconded by Berger. Vote: unanimous.
 3. PR # 10: Motioned to recommend changes to the BOM made by Henderson, seconded by Ferney. Vote: unanimous.
 4. PR # 23: Motioned to recommend changes to the BOM made by Ferney, seconded by Henderson. Vote: unanimous.
 5. PR # 31: Motioned to recommend changes to the BOM made by Berger, seconded by Henderson. Vote: unanimous.
 6. PR # 33: Motioned to recommend changes to the BOM made by Henderson, seconded by Ferney. Vote: unanimous.
 - B. Reviewed draft changes to Policy Resolution #6 (Ceramics/Pottery Studio). Made recommendations and ready to send to legal for review.
 - C. The group tabled further review of the draft of the Vegetation & Watering Coordination & Cost-Sharing Agreement until after the BOM gets feedback on the proposed Snow & Ice Removal Coordination & Cost-Sharing Agreement from the condominium Boards of Directors.

- VII. New Business – The working group reviewed Policy Resolutions #25 (Capital Contributions) and #26 (Restricted Use). PR #25 will be forwarded to the lawyer for review and #26 will continue to be refined by the PRWG in future meetings.
- VIII. Open Forum – No comments.
- IX. Adjournment – In a motion made by Berger and seconded by Henderson, the meeting was adjourned at 3:07 p.m. The next meeting is scheduled for June 9, 2026 at 2:30 in the Community Room.

MEETING MINUTES

POLICY RESOLUTION WORKING GROUP LANSLOWNE WOODS OF VIRGINIA

Tuesday, June 9, 2026

The meeting was held in-person in the Community Room.

Present: Member Representatives Barry Berger & Wes Henderson; Mary Ferney (chairperson); General Manager Audra Reed; Assistant Manager Susie Pfefferkorn

- I. Call to Order – The meeting was called to order by the chair, Mary Ferney, at 2:29 p.m.
- II. Approval of the Agenda – In a motion made by Henderson and seconded by Berger, the agenda was unanimously approved.
- III. Approval of Minutes – In a motion made by Henderson and seconded by Berger, the minutes from the May 19, 2026, PRWG meeting. The motion was unanimously approved.
- IV. Resident Comments on Agenda (agenda items only) – No residents in attendance.
- V. Chairperson’s Comments – Mary Ferney thanked management for including a copy of the policy resolution status list in the packet.
- VI. Old Business
 - A. Continued Review of Policy Resolutions
 1. Reviewed draft changes to Policy Resolution #20 – Reserves for Capital Components. The working group requested the discussed revisions be sent to the BOM for consideration and approval at their next regular meeting.
 2. Reviewed draft changes to Policy Resolution #33 – Purchasing of Goods, Procurement of Services, and Competitive Bidding. The BOM reviewed a draft of changes to this policy at their June 3, 2026, meeting and requested further revisions to clarify General Manager spending authority. Further revisions were made by the working group. Working group requested the discussed revisions be sent to the BOM for consideration and approval at their next regular meeting.
 - B. The working group reviewed the status of policy resolutions under review.
 - C. The working group agreed to table further discussion on the proposed Landscape Vegetation Installation, Replacement, and Watering Coordination Agreement until a decision is made on the proposed Snow & Ice Removal Coordination & Cost-Sharing Agreement.
- VII. New Business – None
- VIII. Open Forum – None.
- IX. Adjournment – In a motion made by Ferney and seconded by Henderson, the meeting was adjourned at 3:14 p.m. The next meeting is scheduled for July 14, 2026, at 1:00 p.m.

MEETING MINUTES

RESERVE STUDY COMMITTEE LANSLOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC

Monday, March 23, 2026

The meeting was held live in the Clubhouse Auditorium and also by Zoom.

Present:

Voting Members: Josh Snodgrass, Bill O'Brien, Charlie Fritts, Cathy Porter, Maryann Mueller-Davis

Non-voting Members: Marie Gay (Building & Grounds Chair), Barry Riordan (Budget & Finance Chair), David Saine (Treasurer)

Others: Audra Reed, General Manager; Susie Pfefferkorn, Assistant Manager; Dondi Searfoss, Chief Engineer

Absent: None

The meeting was called to order at 2:01 p.m. by General Manager Audra Reed.

In a motion made by O'Brien, seconded by Fritts, the draft agenda was unanimously approved.

In a motion made by Porter, seconded by Snodgrass, the draft minutes from the February 23, 2026 Reserve Study Committee were unanimously approved.

Reed asked for nominations for Chair, Vice Chair, and Recorder. No nominations were made. Josh Snodgrass volunteered to serve as Chair. Maryann Mueller-Davis volunteered to serve as Vice Chair. There were no volunteers to be Recorder.

Resident Comments on Agenda Items – None.

Saine gave the Treasurer's Report. Reed introduced Pfefferkorn as the new assistant manager. Committee members introduced themselves.

The committee reviewed the proposals for the 2026 reserve study and questions were answered. In a motion made by O'Brien and seconded by Porter, the committee unanimously voted in favor of recommending to the Board of Members that the Association contract with Firm #1 to conduct the 2026 reserve study.

It was determined that the next meeting would be scheduled after management has a better feel for when the first draft of the study will be received.

Open Forum – no comments.

In a motion made by Snodgrass and seconded by Fritts, the meeting was adjourned at 2:44 p.m.

MEETING MINUTES

RESERVE STUDY COMMITTEE LANSLOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC

Thursday, June 25, 2026

The meeting was held live in the Clubhouse Auditorium and also by Zoom.

Present:

Voting Members: Bill O'Brien, John Bloom, Charlie Fritts, Cathy Porter, Maryann Mueller-Davis

Non-voting Members: Marie Gay (Building & Grounds Chair), Barry Riordan (Budget & Finance Chair)

Others: Audra Reed, General Manager; Susie Pfefferkorn, Assistant Manager; Dondi Searfoss, Chief Engineer; Cathy Williams, Finance Director

Absent: Josh Snodgrass; David Saine (Treasurer)

The meeting was called to order at 10:06 a.m. by Vice Chair Maryann Mueller-Davis.

In a motion made by Bloom, seconded by Gay, the draft agenda was unanimously approved.

In a motion made by Gay, seconded by Porter, the draft minutes from the March 23, 2026 Reserve Study Committee were unanimously approved.

Resident Comments on Agenda Items – Gary Treleven of Potomac Ridge indicated that he may want to comment or have questions for the reserve analyst later in the meeting.

Management had no comments.

Doug Greene of DMA Reserves presented the draft study dated 6/18/25. The study assumed a 2.5% interest rate and a threshold of 5% of total current replacement value of all components. These assumptions resulted in a recommended 12% increase in reserve contributions through 2030, then 3.5% through 2034, and 1.3% beginning 2035 through 2056.

Questions from Committee members, staff, and residents were answered. The Committee requested that Doug revise the assumptions to 3.5% interest and 3% of total current replacement value of all components for the threshold. They also requested that Doug split out the campus-wide asphalt project scheduled for 2030 into two parts, the first half in 2030 and the second half in 2031.

Open Forum – no additional comments.

It was determined that the Committee will meet again in approximately two weeks to review DMA's revised report and meet with Doug again. Management will schedule the meeting and notify Committee members by email.

In a motion made by Porter and seconded by Bloom, the meeting was adjourned at 12:04 p.m.



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XI

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Correspondence to the BOM

Enclosed please find correspondence sent to the Board of Members over the course of the last month, including any correspondence that was received since the last Board meeting. Topics include the restaurant and the shuttle bus.

INFORMAL COMMUNICATION – F/up on Shuttle-related Questions Raised at Board Meeting

From msmarina

Date Fri 6/5/2026 9:41 AM

To BOM <bom@lwva.org>; Audra Reed <audra.reed@lwva.org>; Budget Finance <budget-finance@lwva.org>



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Hello,

This is merely an informal note (which might not be appropriate for the packet?).

Just an FYI, I did follow-up on my research, as requested.

First of all, regarding my spur-of-the-moment suggestion that **LWVA use the HOPA form to find out how many residents do not drive**: Based on a quick AI search, **LWVA cannot ask that question**. The Fair Housing Act prohibits disability-related inquiries, and HOPA does not create any exception for asking about disability or functional limitations. Perhaps, driving limitations data could be collected on a voluntary basis by some other means.

However, AI suggested that **LWVA could circulate a shuttle sign-in sheet** (perhaps, on a clipboard once seated) to determine the actual **number of riders**. As of now, as relayed to me by staff, LWVA only collects data on the **number of rides** (in other words, we do not know if the same person might ride twice in a day).

Second, regarding the case law that had mentioned on common interest obligations, I further examined the cases cited by Co-Pilot AI. I was surprised that they did not seem to be on point. That's not to say that other cases might be.

Third, I am pasting below additional dialogue that Co-Pilot AI generated on this general topic. **I cannot vouch for its accuracy**; at times, AI illuminates and other times it "hallucinates." Nonetheless, a quick glance could spur some ideas for further research.

I hope this helps in navigating some of the difficult issues faced nowadays by most 55+ HOAs.

Marina Rota

 **What a Common-Interest Obligation Is
(HOA/Condo Law)**

A **common-interest obligation** is an expense or responsibility that the association is *legally permitted or required* to fund with assessments because it meets **all** of the following criteria:

1. It is authorized in the governing documents

(Declaration, Bylaws, Articles, or recorded rules) If it's not in the documents, it's not a common-interest obligation.

2. It benefits the entire membership *collectively*

Not a subset. Not a demographic group. Not a category of residents. **Everyone.**

3. It relates to the maintenance, operation, repair, replacement, or preservation of common property

This is the core of the POAA and Condominium Act.

4. It is necessary for the association to function as intended

Infrastructure, safety, insurance, reserves, utilities, structural systems, etc.

If an expense does **not** meet all four criteria, it is **not** a common-interest obligation and **cannot** be funded with mandatory assessments.

What is *not* a Common-Interest Obligation

This is where most Boards get confused.

The following are **NOT** common-interest obligations *unless the declaration explicitly requires them*:

- Shuttle or transportation services
- Restaurants, cafés, or food service
- Social programs
- Wellness programs
- Supportive services (meals, transportation, personal assistance)
- Convenience services (housekeeping, concierge, tech help)
- Anything benefiting only a subset of residents

These are **amenities**, not obligations.

Why this matters for LWVA

Because LWVA is:

- A **55+ Active Adult HOA**, not a senior-services provider
- Governed by **HOPA** and the **Virginia POAA**
- Legally limited to maintaining **common property**, not providing **supportive services**

Therefore:

LWVA cannot treat supportive services as common-interest obligations.

They are discretionary amenities and must be evaluated as **budget choices**, not legal duties.

FYI: Audra Reed
from
Priscilla Sammet

From: Mai, Rachael <Rachael.Mai@loudoun.gov>

Sent: Monday, July 28, 2025 11:30 AM

To: MEMORY PORTER

Cc: Priscilla Sammet

Turner, Mike <Mike.Turner@loudoun.gov>; Khan,

Maryam <Maryam.Khan@loudoun.gov>

Subject: RE: [EXTERNAL] Leisure World now
Landsdowne Woods

Hello Ms. Porter,

Yes, we can have staff look into the existing
proffers and get back to you.

Best,

Rachael Mai

Chief of Staff to Supervisor Mike Turner

I have answered your questions below including the information I received from staff.

Were there proffers made at the time of the original rezoning, including a restaurant and bus service?

Yes, the proffers included requirements for eating and drinking establishments (restaurants) and bus stops/shelters with bus service. These are mandatory uses in the Planned Development – Active Adult/Age Restricted (PD-AAAR) zoning district - which is what Leisure World falls under.

Do the proffers run in perpetuity with the land, and do the proffers for the restaurant and bus service still stand?

Yes, the proffers run with the land in perpetuity,

meaning they apply to the property and all subsequent owners unless amended. The proffers for the restaurant and bus service still stand as they are required uses under the approved Concept Development Plan (CDP).

What would it take to eliminate the proffers for the restaurant and bus service?

To eliminate or modify these proffers, a Zoning Concept Plan Amendment (ZCPA) would be required. This involves a legislative process with public hearings and approval by the Board of Supervisors.

Was there some kind of tax break for the original rezoning?

For tax-related inquiries, we will contact the

Commissioner of the Revenue. I will be following up with them and trying to get you this answer, but it is taking me longer than anticipated.

Can an over-55 gated community be eliminated to be open to the public, and what action would it take?

To remove the age restriction and open the community to the public, a ZCPA would be necessary. This would involve changing the zoning district to one that allows multifamily dwellings without age restrictions. This process requires public hearings and approval by the Board of Supervisors.

Please let me know if you have any additional questions!

**Best,
Maryam**

**Maryam Khan
*Legislative Aide***

**Vice Chair Mike Turner | Ashburn District
Loudoun County Board of Supervisors**

M. 571-479-8153

Maryam.Khan@loudoun.gov

Sign up for our newsletter!

***All correspondence is subject to the Virginia
Freedom of Information Act***

Re: Shuttle Survey

From Donna Machina

Date Mon 6/8/2026 9:32 AM

To Audra Reed <audra.reed@lwva.org>



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I think there's a fear that the goal is to eventually eliminate it but there are people who really depend on it. Some of these people have gone to the BOM meetings and that's their feeling after attending.

On Mon, Jun 8, 2026, 09:20 Audra Reed <audra.reed@lwva.org> wrote:

OK, thanks, Donna. I can include your email as Board correspondence. However, just so you are aware, the Board is not talking about doing away with the bus service. They are just discussing the possibility of reducing the number of days that it runs.

Best regards,

Audra J. Reed, CMCA®, AMS®, PCAM®
General Manager

Lansdowne Woods of Virginia Community Association, LLC
19375 Magnolia Grove Sq, Leesburg, VA 20176
(703) 723-1501 ext. 101

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From: Donna Machina

Sent: Sunday, June 7, 2026 7:39 PM

To: Audra Reed <audra.reed@lwva.org>

Subject: Shuttle Survey

Audra,

Did the survey a few weeks ago online. Don't know if I can add this to the survey results as a comment:

There are people in our community who depend on the shuttle to do their shopping, go to restaurants and medical appointments. When they moved into this community, they understood they would have transportation, even if they no longer drove.

The new website says:

Shuttle Service for Drivers and Non-Drivers

For residents who prefer not to drive, Lansdowne Woods offers a community shuttle bus that runs on a regular schedule. The shuttle provides convenient transportation to:

- Nearby shopping centers
- Medical offices and clinics
- Other essential destinations

Whether you're behind the wheel or riding with ease, Lansdowne Woods ensures that getting around is simple, safe, and stress-free.

It seems unfair that some people who moved into this community expecting certain conveniences as they age are now being told there won't be shuttle service.

Donna Machina

Re: Alternate bus service

From carmen Ross
Date Tue 6/9/2026 1:02 PM
To Audra Reed <audra.reed@lwva.org>



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Audra,
I forgot to mention the Loudoun County bus service is called ParaTransit. You must fill out an application and your doctor does to. It is then sent to an address in California which reviews it and then reports its findings to ParaTransit. It takes about 4 weeks to set it up.
Carmen

Sent from my iPhone

On Jun 9, 2026, at 9:29 AM, Audra Reed <audra.reed@lwva.org> wrote:

Thank you, Carmen, I will convey your comments to the Board of Members.

Audra J. Reed, CMCA®, AMS®, PCAM®
General Manager

Lansdowne Woods of Virginia Community Association, LLC
19375 Magnolia Grove Sq, Leesburg, VA 20176
(703) 723-1501 ext. 101

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From: carmen Ross
Sent: Tuesday, June 9, 2026 9:13 AM
To: Audra Reed <audra.reed@lwva.org>
Cc: wkaiser2367 <wkaiser2367>
Subject: Alternate bus service

Audra,
I have been approved for the Loudoun County Bus service for elderly disabled people. However, it is not so easy to use. Because since it involves several passengers and their **63**

destination, you must give them 1/2 an hour to 3/4 of an hour leeway, before pick up and for return. This makes it very hard for us, and we could miss our doctor's appointment. I had a 9:00 AM appointment in the Dulles area and I had to be ready waiting downstairs by 7:55 to be ready to be picked up no later than 8:30. For return, you give them an estimate time to pick you up with at least a half hour leeway.

Audra, for older people this is too confusing and nerve racking. I now pay someone to take me..Our bus is still the most dependable for medical and PT visits. I hope you will convey this information to the Board of Members.

Carmen

Sent from my iPhone

Re: Food for Thought

From Joyce Zink

Date Mon 6/22/2026 12:26 PM

To Audra Reed <audra.reed@lwva.org>

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Yes thanks. Maybe they would find it helpful.

- Joyce Zink

On Jun 22, 2026, at 10:55 AM, Audra Reed <audra.reed@lwva.org> wrote:

Hi Joyce,

Yes, the Board is in negotiations. Do you want me to include your email for Board correspondence?

Audra J. Reed, CMCA®, AMS®, PCAM®

General Manager

Lansdowne Woods of Virginia Community Association, LLC

19375 Magnolia Grove Sq, Leesburg, VA 20176

(703) 723-1501 ext. 101

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From: Joyce Zink

Sent: Monday, June 22, 2026 9:43 AM

To: jcimbalista . <jcimbalista >; Audra Reed <audra.reed@lwva.org>

Subject: Food for Thought

Audra,

Since there was not an announcement after last week's executive session, I assume negotiations are underway.

I did an analysis with AI and it presented some valuable ideas.

Add a clawback clause stating that if they terminate the licensing agreement or default before a certain period, they must pay a financial penalty to the HOA to **cover the depreciation of the kitchen assets** LWVA purchased.

Will all four partners (Hicham Younes, Mariam Khaziuri, Ahmed Wali Ghouse, Moska Wali Ghouse) be on the liquor license the same as they currently are for their existing FG license? Will all four be signing the agreement?

To be sure they don't use our large facility as a central "commissary kitchen" to handle heavy prep work, catering, or bulk cooking to support their flagship location down the road, add a **"No Offsite Transport" Structural Ban**

You cannot just rely on them promising not to cook for outside events. You must ban the physical movement of food out of the building.

- No food, ingredients, prepped items, or catering trays prepared within the LWVA clubhouse kitchen may be transported off-site or removed from the property boundaries under any circumstances. All inventory delivered to the LWVA facility must be consumed exclusively within the clubhouse dining room or for approved internal HOA events.

If we allow them to use our kitchen to feed their other business down the road, our residents will receive **second-class service**. The chefs will be stressed, the kitchen will be crowded with outside inventory, and our seniors will wait longer for their meals while our HOA pays the electricity and gas bills. By completely banning offsite cooking, we ensure 100% of their focus, energy, and care goes entirely into feeding our community.

So that LWVA does not bear the burden of all **business risks, require that 100% of that subsidy must be loaded onto a resident dining card for each condo every month.**

- **The Leverage:** This ensures the monthly subsidy isn't just free profit for their pocket; it acts as a pre-paid meal voucher. If an owner does not use their \$7 credit by the end of the month, the credit expires and the restaurant 66

keeps the cash. This guarantees foot traffic, *protects the board from "buying nothing,"* and forces them to provide great service to get residents to buy drinks or appetizers beyond the \$7 credit

By structuring the subsidy as **resident dining vouchers**, those who want a restaurant at any cost get exactly what they want (an active, bustling clubhouse), while those who are concerned about risk and asset depreciation get financial protection (the money stays in the pockets of the residents, not as free corporate profit).

Wait on spending more money upfront on new dining room tables, chairs, and refurbishment until they prove they can run the venue

Insert a performance milestone. State that if the new LLC achieves a 90% resident satisfaction rating, hits steady baseline revenue after 12 months, and maintains a zero-infraction record with the Loudoun County Health Department, the HOA will then fund the dining room furniture upgrades for Year 2.

- The HOA has the right to terminate the agreement and stop the subsidy immediately with 30 days' notice if the restaurant receives any critical food-safety violations from the Loudoun County Health Department that are not resolved within 48 hours, or the Resident satisfaction scores fall below 75% on our community's quarterly anonymous surveys

Because LWVA's gated 55+ environment strictly caps their customer base, and LWVA is not allowing outside revenue streams, **this deal is *highly unlikely to survive past the subsidy period without severe friction.*** A flat annual subsidy means your residents are *entirely bearing the financial risk of a business model designed for a standard retail market.*

To protect Lansdowne Woods, your board should use a **"Risk-Shift" Counter-Proposal**. If they want your community's money and improvements, they must give the community absolute control over performance and pricing.

They may cater HOA events in your auditorium, but the HOA must retain the right to use outside caterers if the operators' pricing is too high. Do not grant them an exclusive catering monopoly, or they can artificially inflate prices to recoup lost street-traffic revenue.

The Stand: Remind them that they are getting a premier, large commercial facility for free while asking for a payout.

The Leverage: In exchange for a subsidy, you must mandate that they provide a **15% discount on all catering for official HOA events** held in your auditorium, and they must provide at least two "community coffee hours" or resident events per month at no labor charge.

Joyce Zink

BOARD CORRESPONDENCE: Shuttle Bus Program — Updates on Data, Issues/Opportunities, and Governance Considerations

From msmarinarota

Date Wed 6/24/2026 9:57 PM

To BOM <bom@lwva.org>; Andrea Nyhan - BlueRidgeRep1 <brrep1@lwva.org>; David Upp-BlueRidgeRep2 <brrep2@lwva.org>; Barry A. Berger - MagnoliasRep1 <mgrep1@lwva.org>; Merrill Phelan - MagnoliasRep2 <mgrep2@lwva.org>; Wes Henderson-Overlook <ovrep1@lwva.org>; Wayne A. Kaiser - PotomacRidgeRep1 <prrep1@lwva.org>; David Saine-PotomacRidgeRep2 <prrep2@lwva.org>; Donald F. Lavanty Sr. - RiverbendRep1 <rbrep1@lwva.org>; Fred Bishopp Jr.-RiverbendRep2 <rbrep2@lwva.org>; Mary Norton-RiverviewRep1 <rvrep1@lwva.org>; Trudy Gross-RiverviewRep2 <rvrep2@lwva.org>

Cc Audra Reed <audra.reed@lwva.org>; Budget Finance <budget-finance@lwva.org>

 1 attachment (496 KB)

LWVA Data on Shuttlebus Program.png;



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For the purposes of the next Board discussion, I'd like to provide updated information on LWVA's shuttle bus program and practical suggestions to help mitigate the impact of any program adjustments.

2026 Program Cost Supported by LWVA Members at Large

In short, it appears that LWVA members are spending roughly \$140,790 per year—or \$37.60 per “ride”—for a program that benefits about 1.1% of the community.

Updated Cost Breakdown (Year 3 Pricing)

- **Yearly Cost:** \$140,790
 - \$130,790 shuttle contract (Year 3 pricing)
 - \$10,000 estimated fuel
- **Weekly Cost:** \$2,707.50
 - $\$140,790 \div 52$ weeks
- **Daily Cost:** \$676.88
 - $\$2,707.50 \div 4$ service days per week
- **Per-Ride Cost:** \$37.60
 - $\$676.88 \div 18$ rides (daily average)
- **Percent of Community Served Daily (on Average):** 1.1%
 - Assuming $\sim 1,700$ residents $\div 18$ average rides

Note: These calculations are based on the *attached* data provided by LWVA’s finance staff for 2026 Year 3 pricing (my initial calculation was based on Year 1 pricing). Staff defines a “ride” as a round trip and notes that a resident may take more than one ride per day. *The exact number of individual beneficiaries is currently unknown, though it could be determined with minimal effort given the dollar-volume of this expense.*

Suggested Next Steps for Board Consideration

Any necessary adjustments to the LWVA shuttle bus program may be *extremely* difficult for the Board to implement, given:

- the long-standing entrenchment of this discretionary amenity in our community culture, versus
- the fact that this discretionary amenity is not legally required for 55-plus HOAs (unless dictated by our declarations) and perhaps may not fully align with common-interest/benefit guidelines under HOA law.

Thus, I encourage the Board to consider the following:

- Following up on the month-to-month contracting option raised by a Board member at the last meeting, and concurrently
- Initiating a careful review of the broader contextual issues involved—legal, financial, and governance-related—with the input of at least one HOA law expert.

These considerations are crucial not only to (a) the equitable funding of services but also to the character and long-term direction of LWVA as an **55+ Active Adult** community and (b) avoiding the risk of drifting toward an **Independent Living** community model—at the expense of the membership at large.

Possible Solutions for LWVA Beneficiaries and the Membership at Large

First, once again, I urge **vigorous** inquiry into Loudoun County’s Mobility Program, which I first introduced in my Board Correspondence on April 29. For your information, I have since had a second conversation with Mobility Program outreach staff; I learned that it is actually the **Paratransit Program** that could help fill the gaps left by any reduction in LWVA shuttle service days. This could greatly benefit current shuttlebus users.

In this instance, I learned that the Paratransit Program provides **door-to-door service** not only for persons with disabilities but **also for older adults who can no longer drive**, upon approval of an initial application. **The applicant does not need to use a walker or wheelchair; a physician’s attestation that the individual can no longer drive is sufficient for eligibility.** Further, the program is not limited to medical transportation.

Second, as I urged at the last meeting, I suggest that the Board direct staff to **schedule a community presentation with the Mobility Program Coordinator** (tel. 703/771-5665), who is eager to assist and routinely develops trainings tailored to different audiences.

It would be especially valuable to schedule this county-community presentation at the **next Board meeting**, where both the Board and residents (during the resident-comment period) could ask questions directly.

Third and finally, to support informed decision-making, I urge Board members, once again, to do their own due diligence on this program and to look beyond the hearsay or misinformation put forth at LWVA meetings (at both last month's Board meeting and this week's Budget & Finance Committee [6/23] meeting, see below).

For instance, some claims at this week's committee meeting (at 1:01:48) are as follows:

CLAIM: There are lots of LWVA residents are “lonely” and “just take the bus to go somewhere and have a cup of coffee to socialize . . . socializing is the main item” (at 1:04:05).

FACT: LWVA offers more than twenty-five social clubs and numerous activities that already support resident engagement. While social connection is important, LWVA is not responsible for addressing resident loneliness or boredom.

On another note, LWVA currently lacks an on-site coffee venue where residents can gather *informally* and hang out without purchasing a full restaurant meal; the proposed full-scale restaurant does not address this gap.

CLAIM: LWVA residents wait “for hours” for county transportation (at 1:06:54).

FACT: Paratransit staff have assured me that the County uses sophisticated logistical systems to ensure timely access to appointments, including for medical services such as dialysis. Based on both County information and my direct observation (of similar programs in other areas), it is typical for riders to receive a 30-minute pickup window, which accounts for traffic and unforeseen delays—not “hours” of waiting. LWVA is not responsible for providing personal “convenience.”

CLAIM: Maybe there are “100 people” who take the bus (at 1:05:49).

FACT: LWVA does not actually know how many *individual residents* use the shuttle, despite spending well more than \$100K per year on the program. The only available metric is the average of 18 rides per day, which reflects boardings—not unique riders (per finance staff). **So on any given day, most likely, not more than roughly one percent of LWVA members use the service.**

LWVA's lack of basic utilization data is a governance gap that the Board can and should address. While there may be legal barriers to asking residents to self-identify as “non-drivers” on a HOPA form, there are no such barriers to collecting operational data from shuttle users. A simple sign-in clipboard, circulated after passengers are seated—even for just a three-month period—would provide the Board with essential information about how many persons use this service and how often.

In closing, I would simply note that in “55+ active adult” communities, aging-in-place supports are typically provided by county programs, private services, or family caregivers. Unlike in “independent living” communities, these supports should not be regarded as HOA amenities that are to be

funded by the membership at large (many of whom are already challenged in supporting intergenerational financial needs/emergencies within their own families).

I urge the Board to:

- **keep this distinction in mind** as you reflect on the information in this correspondence
- **be very attentive to the broader HOA legal context**, including any applicable common-interest obligations and common-benefit principles that may apply to "55+ active adult" communities
- **most importantly, fully explore how taxpayer-funded county transportation programs could mitigate** any impacts of any compromises that the Board may need to make to adhere to the aforementioned principles.

Marina Rota

Attachment

8 Messages

< Info on Shuttle Bus ^

upon days of runs?

It is a three-year contract that runs from August 1, 2023, through July 31, 2026. Management will be going out to bid again this year.

Year one: \$122,990 per year. Trips/rentals are \$300 for 3 hours, \$50 per half-hour after that.

Year two: \$126,680 per year. Trips/rentals are \$310 for 3 hours, \$50 per half-hour after that.

Year three: \$130,790 per year. Trips/rentals are \$320 for 3 hours, \$50 per half-hour after that.

The cost of the shuttle is recorded on the Income Statement as "Bus Contract"

The cost of trips/rentals is recorded on the Income Statement as "Activities Expenses-Trips"

The shuttle runs 4 days per week (Monday, Tuesday, Thursday, Friday). The schedule is attached.

There is a Sunday run to St Theresa's which the church pays for on behalf of our residents. Scheduled trips (planned by Mary our trip coordinator) are paid through the cost of the trip and is recorded as Trips Income.

- Monthly/yearly usage reports?

Our ridership averages 18 per shuttle day. This does not necessarily mean there are 18 different riders. A resident who rides twice in one day will be counted twice.



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XII.A

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Shuttle Bus Service

As everyone knows, our current shuttle contract expires at the end of July. Before bringing any recommendations to the Board, Management spent the last several months taking a look at the shuttle program to determine whether there were opportunities to reduce costs while still providing an important service to residents.

One of the first things I wanted to determine was whether LWVA is actually required to provide shuttle service. I contacted Loudoun County Planning and Zoning to see if there were any zoning conditions, proffers, or development approvals that required us to operate a shuttle. The County confirmed that while there is a reference to an "internal bus program" in the 1995 proffer documents, there do not seem to be any requirements regarding the level of service, schedule, or even that the Association continue operating a shuttle today. There does not appear to be any legal requirement that LWVA continue maintaining the current 4-day schedule.

We surveyed the community to better understand how often residents ride, where they go, and how changes might affect them. More than 220 residents responded. The survey showed that many residents do not currently use the shuttle, but those who do rely on it primarily for grocery shopping, medical appointments, pharmacies, and other essential errands. Medical appointments and grocery stores were by far the most important destinations. The comments also made it clear that many residents view the shuttle as one of the community's most valuable amenities and expect to rely on it more as they age. At the same time, some residents felt reducing service to 3 days per week would be a reasonable way to reduce costs, while others suggested user fees, a smaller vehicle, or other alternatives. There was no clear consensus.

This topic was also discussed at the June 23 Budget & Finance Committee meeting. The general consensus of the Committee was that they would like to see a working group established to take a more in-depth look at the shuttle program and possible long-term options. Management has explored alternatives in the past. For example, we looked at the possibility of sharing

transportation services with another senior community. That option ultimately was not practical and, based on feedback received at the time, was not something residents wanted to pursue. There are also other transportation options available to residents, including Loudoun County public transportation services, the County's paratransit program for those who qualify, Uber, Lyft, taxi services, personal drivers, family, friends, and neighbors.

Management will continue to provide residents with information about available transportation resources when appropriate. However, I do not believe it is Management's role to determine which transportation option is best for individual residents. Lansdowne Woods is an active adult community, not assisted living, and residents should ultimately decide which transportation option best meets their own needs.

Management also issued a Request for Proposals and received pricing from several transportation companies. The proposals showed that there are less expensive options available than our current renewal pricing. They also showed that a 3-day schedule could reduce annual operating costs even further, depending on which vendor the Board ultimately selects.

After looking at everything, I do not believe there is a simple right or wrong answer. The shuttle is clearly an important amenity for many residents, particularly those who no longer drive or who depend on it for medical appointments and grocery shopping. At the same time, the Board has a responsibility to continually evaluate all Association expenses and determine whether there are ways to provide the same or similar level of service more efficiently.

The purpose of this review was never to recommend eliminating transportation. It was simply to gather facts before the Board makes a decision on the next shuttle contract. I am recommending that the Board consider moving to a 3-day per week bus operation. It appears from the survey and feedback that most residents prefer the 3 days to be Tuesdays, Thursdays, and Fridays.

I have confirmed with our current provider, Chariots for Hire, that they are willing to continue providing shuttle service on a month-to-month basis if the Board is not ready to make a final decision before the current contract expires. This gives the Board time to determine whether it would like to establish a working group and, if so, allow that group to complete its review before making any long-term decisions. If the Board decides not to establish a working group, it can instead determine whether the shuttle should remain at 4 days per week or be reduced to 3 days per week. Once that direction is provided, Management will present the transportation proposals through the appropriate committee process and return to the Board of Members with a final recommendation for vendor selection and contract award.

Proposed Resolution:

Move that the Board of Members approve changing the LWVA shuttle service schedule from 4 days per week to 3 days per week, operating on Tuesdays, Thursdays, and Fridays. The Board further authorizes Management to continue shuttle service with Chariots for Hire on a month-to-month basis until a new transportation services agreement is approved and executed.

Management shall return to the Board with a recommendation for vendor selection and contract award.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	MG	83.5				
Bishopp, Fred T., Jr.	RB	114.5				
Gross, Trudy M.	RV	120.5				
Henderson, Wesley C.	OV	7				
Kaiser, Wayne A.	PR	115				
Lavanty, Donald F., Sr.	RB	114.5				
Nyhan, Andrea	BR	119.5				
Norton, Mary K.	RV	120.5				
Phelan, Merrill D.	MG	83.5				
Saine, David V. (proxy to Wayne Kaiser)	PR	115				
Upp, David J.	BR	119.5				
TOTAL VOTES		1113				

RE: Question Regarding Possible Proffer or Zoning Requirement for Transportation Service

From Stewart, Courey <Courey.Stewart@loudoun.gov>

Date Mon 6/8/2026 3:10 PM

To Audra Reed <audra.reed@lwva.org>

Cc Hambrick, Jacob <Jacob.Hambrick@loudoun.gov>; Hancock, Richard <Richard.Hancock@loudoun.gov>; Wegener, Brian <Brian.Wegener@loudoun.gov>



External (courey.stewart@loudoun.gov)

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Good afternoon,

Thank you for contacting the Department of Planning and Zoning regarding the property located at 19375 Magnolia Grove Square. In response to your inquiry, please be advised of the following:

- The subject site is zoned Planned Development – Active Adult/Age Restricted (PD-AAAR) Legacy Zoning District and regulated by the Loudoun County Zoning Ordinance (Zoning Ordinance).
- Currently, pursuant to Section 2.02.05.10.b.1 of the Zoning Ordinance, bus stops/shelters with bus service must be provided in the PD-AAAR Zoning District. Nevertheless, ZMAP-1994-0001 which rezoned the property to PD-AAAR, did not detail any language about transportation or shuttle/bus services for residents. However, there was one mention about an “internal Bus Program” under the HOA Related Capital Facilities Contributions as part of the ZMAP-1994-0001 Proffers Addendum, but no further mention of the specifics.

Perhaps the Department of General Services, Transit and Commuter Services may be able to provide additional information about transportation services within or near the property.

Please do not hesitate to contact the Loudoun County Department of Planning and Zoning at dpz@loudoun.gov if you have any further questions.

Regards,

Courey Stewart

Planner II

Loudoun County Department of Planning and Zoning

1 Harrison Street, S.E., 3rd Floor, P.O. Box 7000

Leesburg, VA 20177-7000

571-627-3573

Visit Us On The Web: <https://www.loudoun.gov/planning>

Attachment A of ZMAP 1994-0001 is provided below.

ATTACHMENT A

May 24, 1995

ADDENDUM TO LANSDOWNE PROFFERS - ZMAP 1994-0001
HOA RELATED CAPITAL FACILITY CONTRIBUTIONS

<u>Capital Facility Proffer Contributions</u>	<u>Estimated Value</u>
1. HOA Neighborhood Recreation Areas (minimum)	
· 4 pavilion community areas, each including	\$140,000
- 1 covered pavilion w/30 person capacity	
- 4 picnic tables	
- 1 volleyball sand court	
- 1 tot lot	
· 1 basketball court	30,000
· 15,000 linear feet of trails	330,000
· 2 25-meter outdoor swimming pools	550,000
· 1 lighted, all-weather tennis court	30,000
2. HOA Owned Community Center	450,000
3. Goose Creek Scenic Easement (132 acres)	167,000
4. Fire and Rescue Site (2.5 acres)	150,000
5. PD-AAAR Facilities	
· 30,000 Sq. Ft. Community Center - West Side (2 Phases) w/recreation and craft rooms	4,000,000
- 4-6 Lane indoor lap swimming pool	
- 2-4 Outdoor tennis courts	
- internal bus program	
· 14,000 Sq. Ft. Community Center – East Side	2,000,000
- 1-2 Outdoor tennis courts	
- Multipurpose rooms	
- Meeting rooms	

Lansdowne Woods Passenger Counts

January 2026

Time/Date	2	5	6	8	9	12	13	15	16	20	22	23	26	27	29	30
9:00 AM	5	1	3	8	4	4	6	4	3	5	7	9	Snow	Snow	8	1
10:00 AM	3	3	3	11	6	3	7	3	2	4	8	7	Day	Day	8	0
11:00 AM	2	3	0	2	0	2	5	1	1	2	1	0	Snow	Snow	3	1
1:00 PM	5	3	5	9	5	8	6	8	5	3	9	10	Day	Day	12	8
TOTAL	15	10	11	30	15	17	24	16	11	14	25	26	0	0	31	10

Lansdowne Woods Passenger Counts

February 2026

Time/Date	2	3	5	6	9	10	12	13	17	19	20	23	24	26	27
9:00 AM	8	3	8	5	9	4	3	3	6	6	7	0	6	7	3
10:00 AM	5	5	3	3	2	2	9	4	4	6	7	1	3	4	0
11:00 AM	2	1	2	3	1	3	3	2	4	2	4	1	5	2	3
1:00 PM	8	6	6	7	4	15	9	6	5	9	1	5	8	13	11
TOTAL	23	15	19	18	16	24	24	15	19	23	19	7	22	26	17

Lansdowne Woods Passenger Counts

March 2026

Time/Date	2	3	5	6	9	10	12	13	16	17	19	20	23	24	26	27	30	31
9:00 AM	4	4	6	5	4	5	5	3	4	2	3	1	3	4	7	2	4	7
10:00 AM	7	2	3	2	3	3	4	3	5	1	7	2	1	2	1	2	5	1
11:00 AM	1	1	2	2	1	6	1	3	2	2	2	4	3	3	2	3	3	2
1:00 PM	5	6	7	7	4	10	4	13	5	5	11	10	7	7	9	9	9	8
TOTAL	17	13	18	16	12	24	14	22	16	10	23	17	14	16	19	16	21	18

Lansdowne Woods Passenger Counts

April 2026

Time/Date	2	3	6	7	9	10	13	14	16	17	20	21	23	24	27	28	30
9:00 AM	8	1	6	4	5	2	3	9	5	2	5	4	6	2	6	5	7
10:00 AM	2	2	3	3	2	4	2	3	4	3	4	2	5	1	2	0	4
11:00 AM	4	1	0	1	1	2	2	1	0	0	1	2	2	1	6	1	0
1:00 PM	10	7	4	9	7	7	10	7	9	10	4	8	17	12	3	3	11
TOTAL	24	11	13	17	15	15	17	20	18	15	14	16	30	16	17	9	22

Lansdowne Woods Passenger Counts

May 2026

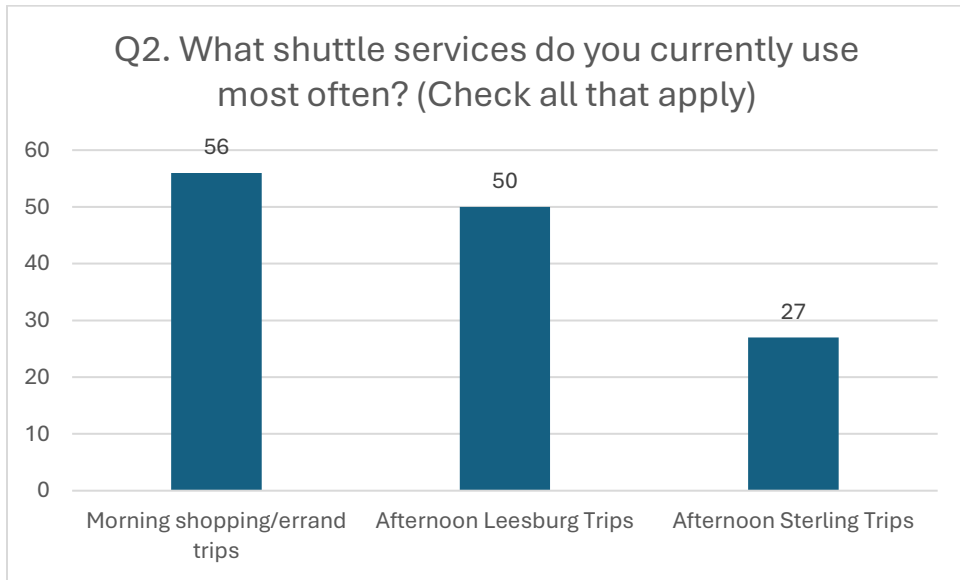
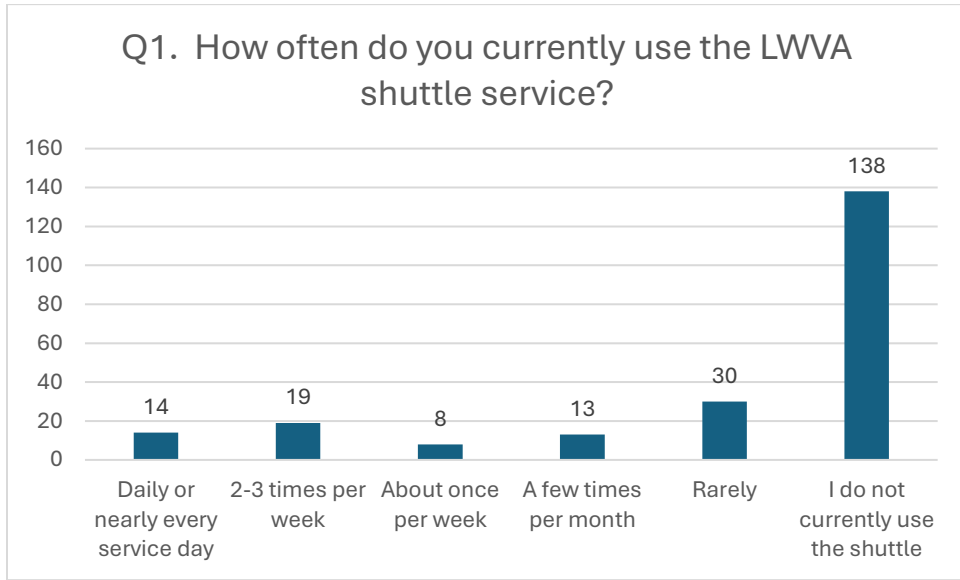
Time/Date	1	4	5	7	8	11	12	14	15	18	19	21	22	26	27	29
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10:00 AM	5	1	0	4	3	0	4	5	2	1	2	2	1	4	6	5
11:00 AM	1	2	2	1	1	2	2	0	2	1	2	2	1	3	1	2
1:00 PM	11	7	11	8	14	10	9	10	7	7	6	9	9	12	8	8
TOTAL	19	15	16	17	21	18	21	19	17	14	13	21	15	22	19	20



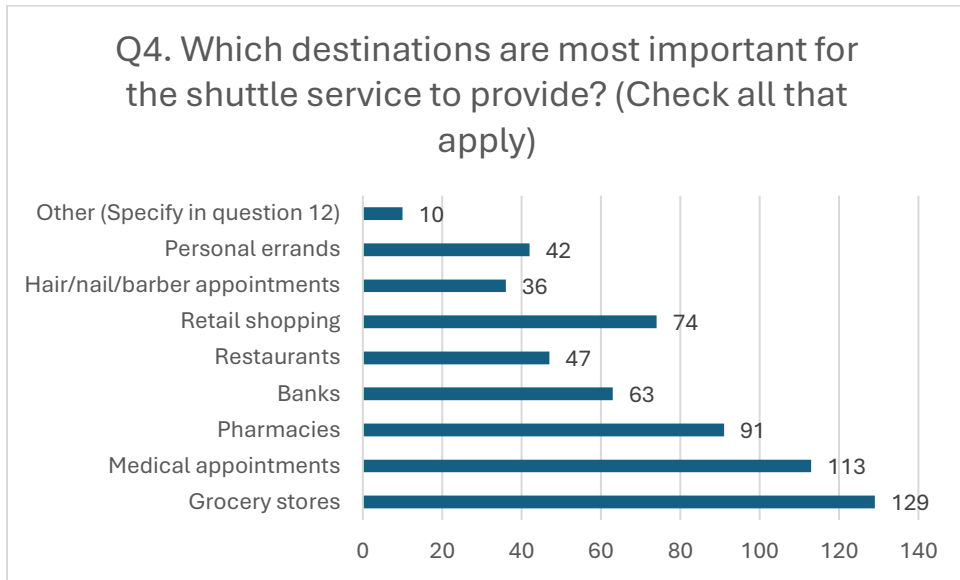
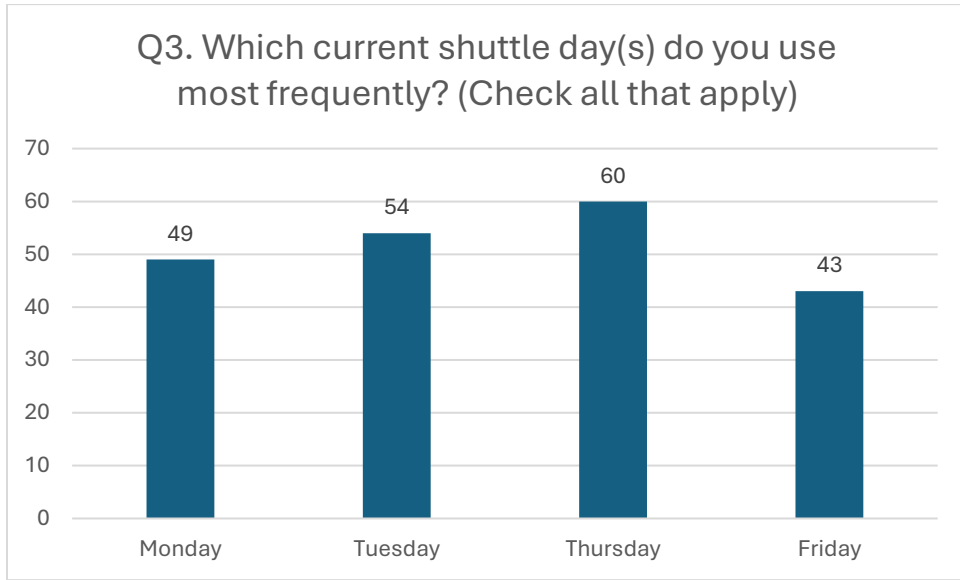
Shuttle Bus Vendor Comparisons

			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5
Item	Description	Current Pricing & Terms	Pricing & Terms	Pricing & Terms	Pricing & Terms	Pricing & Terms	Pricing & Terms
Daily Shuttle	4 days/week	\$130,790 August 1, 2025-July 31, 2026	\$134,714 August 1, 2026 - July 31, 2027	\$109,200 August 1, 2026 - July 31, 2027	\$197,600 August 1, 2026 - July 31, 2027	\$157,217.98 August 1, 2026 - July 31, 2027	\$138,000 August 1, 2026 - July 31, 2027
Daily Shuttle	3 days/week	Not applicable	\$105,554 August 1, 2026 - July 31, 2027	\$81,900 August 1, 2026 - July 31, 2027	\$148,200 August 1, 2026 - July 31, 2027	\$141,582.05 August 1, 2026 - July 31, 2027	\$103,500 August 1, 2026 - July 31, 2027
Type of Bus		24-passenger ADA shuttle bus	24-passanger ADA shuttle bus	24-28 passenger ADA shuttle bus	24 passenger ADA shuttle bus	24 passenger ADA minibus	10 passenger ADA van
Sunday Shuttle	Paid for by church	\$320.00 for up to 3 hours plus \$50.00 for each additional ½ hour	\$330.00 for up to 3 hours plus \$50.00 for each additional 1/2 hour	\$85/hour with 5-hour minimum (\$425 minimum)		\$172.50/hour with a 3 hour minimum *reference rate sheet in proposal	\$103/hour with a 4 hour minimum
Field Trips		\$320.00 for up to 3 hours plus \$50.00 for each additional ½ hour	\$330.00 for up to 3 hours plus \$50.00 for each additional 1/2 hour	\$90/hour with 5-hour minimum (\$450 minimum)		\$172.50/hour with a 3 hour minimum *reference rate sheet in proposal	\$103/hour with a 4 hour minimum
Comments				fleet of 11 vehicles, two dedicated ADA minibuses currently. 4% increase in daily shuttle service per year for multi-year. Rates for Sunday shuttle and field trips reviewed annually and adjusted as needed based on service usage and operating conditions at that time			

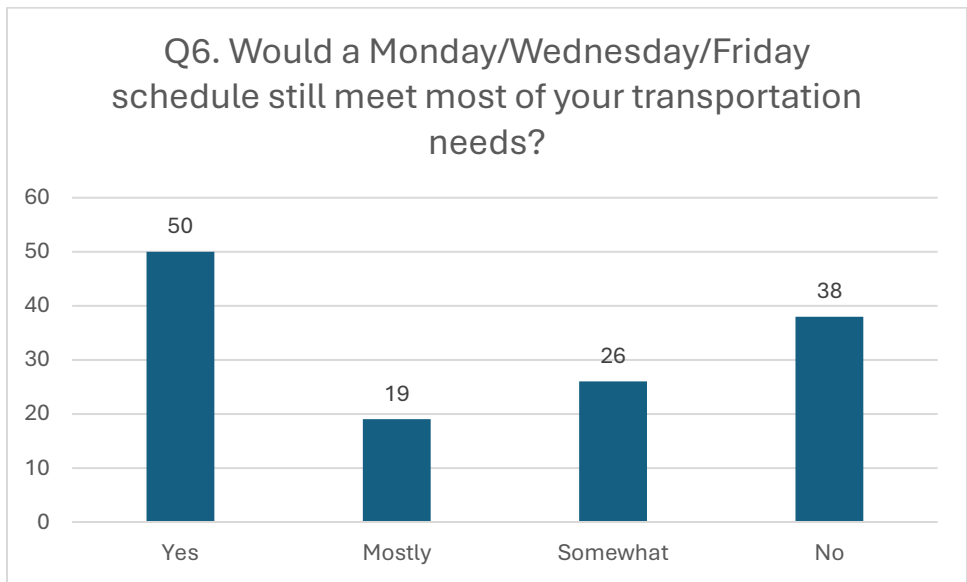
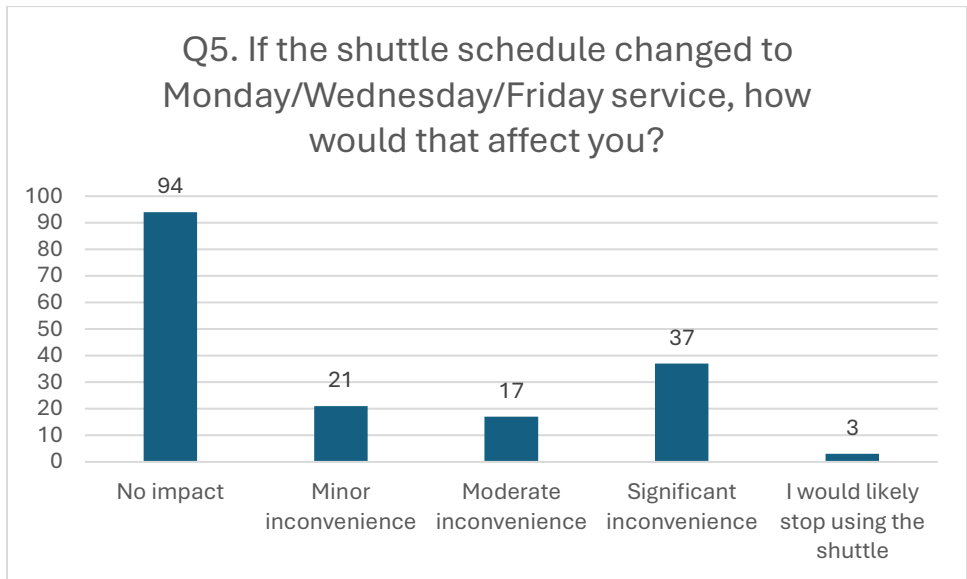
LWVA Shuttle Service Survey



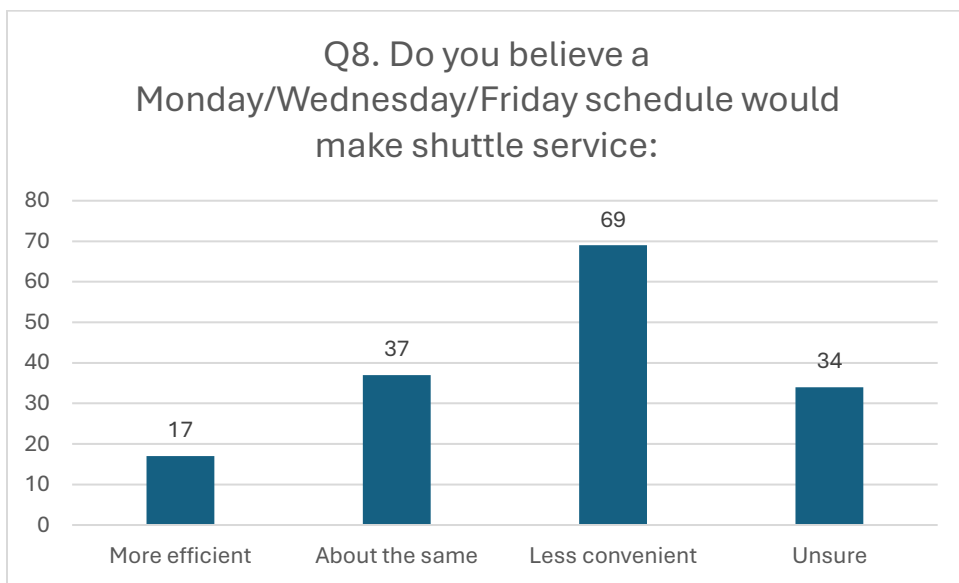
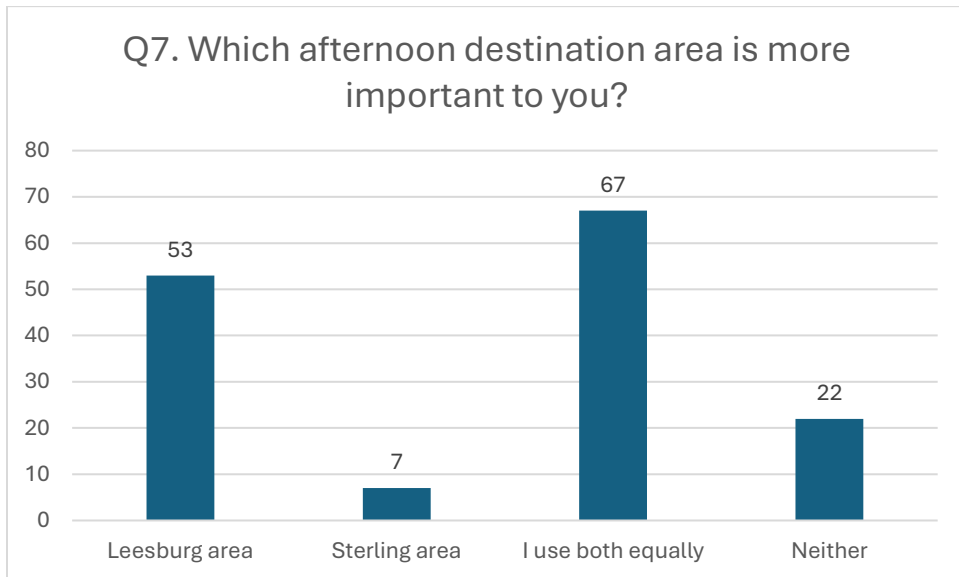
LWVA Shuttle Service Survey



LWVA Shuttle Service Survey

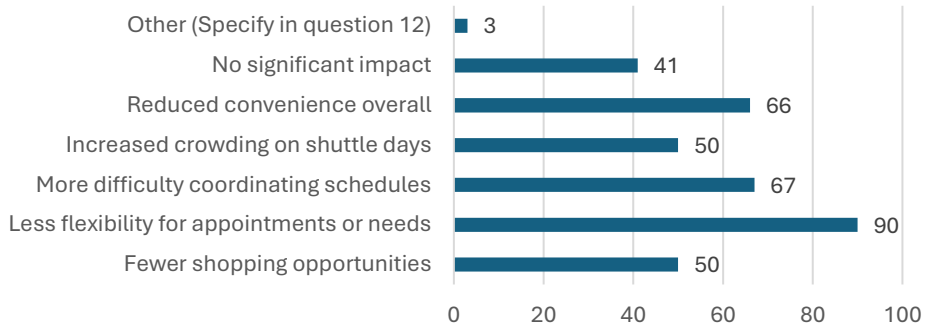


LWVA Shuttle Service Survey

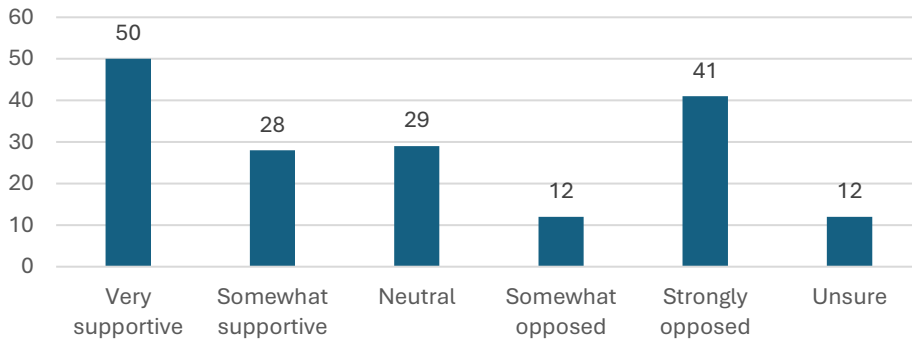


LWVA Shuttle Service Survey

Q9. If the shuttle service changes from 4 days to 3 days per week, which impacts, if any, do you believe would affect you? (Check all that apply)



Q10. If reducing shuttle service from 4 days to 3 days per week reduces LWVA's operating expenses, how supportive would you be of the proposed schedule change?



Q11. Are there specific days, times, or destinations you believe are especially important to preserve?

1. Bank destination first of the month
2. Grocery Stores
3. Hospital and medical offices, both morning and afternoon on days these locations are serviced
4. I have many dental appointments. Right now my daughter in law gives me rides as she is not working , but she will be working again in Sept and will not be able to give me rides.
5. I usually ride the bus on Tuesday and Thursday mornings for doctor's appointments, medical tests and the afternoons in Leesburg.
6. INOVA Health System is expanding aggressively in the Ridgetop Circle (Sterling) area. Many doctors do not offer Friday PM hours.
7. Losing two days for appointment Losing 2 days fo
8. MEDICAL BUILDINGS, GROCERY SHOPPING
9. Monday, Tuesday and Thursday. Morning afternoon
10. Morning and afternoon.. the destination is Costco and
11. Mornings for doctor appointments
12. My wish is that the current bus operating schedule be maintained.
13. N/A
14. No
15. NoN
16. Only thing about keeping Thursday is that it is Senior Day discount at Harris Teeter Groceries. Walgreens also has a discount day for Seniors on the first Tuesday of
17. the month.
18. shopping centers with variety of stores
19. The afternoon schedules allot little time for shopping. Increase the time length esp. for Dulles Mall.
20. The following times are especially important to preserve: 9am, 10am, 11am. The following destinations are especially important to preserve: all medical offices (Deerfield Ave, Hospital, Sandridge Way, etc.), all grocery stores, all retail stores, Walmart, Costco, etc.
21. The frequency is important for regular medical appointments, i.e. physical therapy, ophthalmology etc.
22. The shuttle service is one of the main reasons I bought here. Making this second change in service is a shifty bait and switch.
23. Thursdays are Senior Day at Harris Teeter

Q11. Are there specific days, times, or destinations you believe are especially important to preserve?

24. Tuesday and Thursday are days that offer Senior Discounts - Walgreens, Ross, Harris Teeter.
25. Tuesday or Thursday
26. We need a shuttle bus to the Metro Rail Station
27. Wednesday trips
28. Would like Tuesday and Thursday for Senior Discounts. Wednesday would be preferred third day.
29. Gaint at Ashburn Village, Post Office, Costco, Target, Kohl's, Restaurants
30. All the days/times/destinations are very important - please do not change
31. Medical appointments, groceries, pharmacies, general shopping for clothing and gifts, etc. Cannot do them all in a single run so having fewer run would be difficult deal with.
32. Thursdays are Senior Day at Harris Teeter
33. All doctor's appointments have a long wait - need the days
34. Need access to 5 days a week for appointment; currently have a caregiver but that will run out and I will need a shuttle
35. With a M,W,F schedule - there are a lot of holidays on Mondays
36. Monday and Friday are important
37. Monday, Thursday, Friday - afternoons
38. Doctor's office visits and grocery stores
39. Tuesday, Thursday and Friday are more convenient for doctor's appts., many doctors don't make appts. on Monday and close early on Friday
40. Monday, Tuesday and Thursday for doctor's appts.
41. I do not currently use the bus but I know many friends and neighbors depend on it and I might need it soon. They don't want the schedule to change
42. Thursdays are Senior discount day and a convenient pharmacy day
43. We need to preserve Thursday or Friday - my wife has cancer, she goes for treatment for blood transfusion and ever 8 weeks another transfusion for R/A.
44. I do not currently use the shuttle for local trips, but plan to use it for trips into DC for museums and shows, which I have done in the past.
45. Preserve what we have as a Senior. I moved here for the bus and our condo fees go up each year and pays for the bus. Do not bill owners for bad judgements made by LWVA office.

Q11. Are there specific days, times, or destinations you believe are especially important to preserve?

46. Tues, Thursday, Friday. My medical DR's are in Leesburg only Tues & Thurs. I am blind in left eye, see my eye DR every 3 weeks to check my eye for bleeding. Also had surgery my DR is only here on Thursday.
47. Keep Thursday for Harris Teeter senior discount shopping
48. If we go to three days a week - Tuesday, Thursday, & Friday
49. All of them.
50. All days are important.
51. Residents want to continue with schedule as it is currently - 4 times a week, same times, same destinations.
52. At the present time I do not use the bus service, but I am not sure about the future. For the service for others I suggest 4 days per week.
53. Monday, Thursday, Friday. Wegmans.
54. Definitely Tuesday, Thursday & Friday. Many holidays are celebrated on Monday.
55. Grocery stores - retail stores - medical appointments. Moved here 5 weeks ago & shuttle service is helpful.

Q12. Additional comments or suggestions:

1. I can see when I will need to use this service in the fu
2. Activity participation will be impacted.
3. Although I currently don't use the bus I'm nearing the decision to stop driving so I'd be dependent on using the bus for most outside needs. The Schuyler is one of the reason I came to LWVA.
4. Although I don't currently use the service, I think it is very important to maintain this service. it is a strong selling point for this community.
5. Circulate a survey or email blast for the Clubhouse to assess number of residents who do not drive. Create a hybrid system w/the Loudoun Mobility Assistance Program, promote transit travel training, and reduce LWVA-contracted services to two, as LWVA is an Active 55 community.
6. Cutting this down when it is part of my bylaws for me to have a shuttle service is why I live here or partly why I live here
7. electronic map showing routes and times until next shuttle
8. I currently do not use the shuttle service but my husband and I took the shuttle service availability into consideration when we chose to purchase our condo in LWVA. I may not need it now, but it is very comforting to know that it will be there when I get older and can no longer drive. Most of my neighbors and friends use the shuttle almost daily. It would be a hardship for them to lose this very important amenity and I believe it is a selling feature for prospective residents.
9. I do not currently need the shuttle. I would like it to be available when the time comes that I need it.
10.I do not have a need for shuttle services at this time.
11.I do not use currently
12.I do not use the shuttle at this time. However, I support having a shuttle bus and paying for this service as I will need this service in the near future.
13.I do not use the shuttle service but do believe it is important enough to many that it should be maintained. I believe a reduction in days of service is something that would not be unreasonable and a reduction that everyone could adjust to. With the recent increases in condo fees, and the projected increase, every amenity should be evaluated and consideration given to ways to lower expected increases.
14.I don't currently use the shuttle on a regular basis, but when driving is no longer possible I would use it 3 days a week. It is one of the reasons I bought a condo in this complex.
15.I don't use it now but it is one of the reasons I bought in Lansdowne Woods because in the future we will all need it

Q12. Additional comments or suggestions:

16.I don't use this service.
17.I have never used the shuttle in the 10 years at LWVA.
18.I have seen other condos that charge \$1 per use. It seems to work.
19.I like the four days!!!!!!!!!!!!!!
20.I strongly support for those who need it who
21.I think I will be using the shuttle frequently in the future when I stop driving. Would like flexibility of more days per week rather than less.
22.I think services like the shuttle have contributed to turning LWVA into closer to an assisted living complex than an Active 55+ community. A condo is, in essence, a house in the sky...call an Uber if you don't drive.
23.I THINK THOSE WHO USE THE SHUTTLE SHOULD BE CHARGED A small user fee, maybe \$1 per trip. Purchase a LWVA shuttle bus farecard from clubhouse office for \$25, then shuttle bus driver punches a mark in it each time you ride. Shuttle driver handles no cash. I've never used the shuttle during 3 1/2 years living at LWVA.
24.I would be happy to use the shuttle for day trips on Tuesdays or Thursdays. Would offer more flexibility for those of us who have reoccurring obligations on Wednesdays.
25.I would prefer a Tuesday and Thursday schedule.
26.I'm sure the day will come when I need the shuttle. The change in schedule will allow me to go on more trips as I have tap class on Wednesdays. I don't want to influence the survey so that it affects those who use it regularly.
27.If having the bus three days a week is a money saver, I say. do it
28.if reducing normal daily runs increases availability of Tours/Day Trips all for it.
29.In the nearly 10 years I have lived in Riverview, I have never used that shuttle except for excursions. That said, I know my neighbors uses it and maybe when I can no longer drive, that would be beneficial for me. For now, the existence of this amenity does not benefit me.
30.Inova Hospital main entrance, Movie theater at the Wegmans Center, Thee Fountain Restaurant
31.is it possible to have a shuttle bus drop people off at a Loudoun bus stop ? There is one near here but is too far to walk.
32.Keep the trips to Museums and Old Town Alexandria
33.Make sure everyone knows that we have a shuttle bus.
34.Mondays and Fridays are heavy traffic days.
35.Multiple stops in a shopping center might help those with limited mobility, like CVS and Harris Teeter on the Lansdowne runs.

Q12. Additional comments or suggestions:

36. My comment is the same as the argument for the restaurant - the shuttle bus is one of the most important amenities LWVA offers. These two amenities were instrumental in my moving to LWVA, and influenced my decision to move here 25 years ago when the first building was going up. Further, these are the two biggest things that set us apart from other over 55 communities. Given that we began adding buildings and residents over 20 years ago, our community demographics have changed to where we are mostly over 65 - and older. This community attracts more than empty nesters - which was the scenario for the earlier concept for over 55 communities. Not only are LWVA residents "aging in place," the entire senior population of the US is living longer. According to a June 26, 2025, U.S. Census Bureau report?, the share of the nation's population that is age 65 and older grew from 12.4 percent to 18 percent from 2004 to 2024. The report goes on to state that during this same period, the number of U.S. metro areas with more people age 65-plus than children increased from 58 to 112. Nearly 30 percent of the nation's 387 metro areas have more older adults than youth. LWVA is the preeminent community to accommodate these demographics - but only with the current amenities. Many of us have already given up driving - and this number will only increase.
37. None - I don't currently use the bus service, believe that the M/W/F schedule would work if I needed to use the service.
38. Now that Uber and Lyft are options, the shuttle service is an unnecessary expense to the community at large. LWVA is an over 55 community, not assisted living.
39. The greatest change would be trying to find coordinated appointment times.
40. The people who use the shuttle should pay for it, the same way those who use fitness classes pay for it every month.
41. The shuttle service is a critical amenity at LWVA. There are many people who do not have cars or end up being unable to drive due to various medical conditions. There are no other reliable forms of public transportation that are accessible for pick up and drop off to necessary destinations. LWVA is a remarkable 55+ community that stands out precisely because of the infrastructure and services it offers an ageing demographic whose needs vary over time. Frequent, reliable, accessible transportation is a basic need for people at any age and is a cornerstone for independent living.
42. There are LWVA trips on several Wednesdays
43. There are so many residents here that do not drive and would suffer from any bus discontinuation

Q12. Additional comments or suggestions:

44. This is an absolutely essential amenity for many residents, that was expected as part of agreement when moving here!
45. This is focused on those who use the service. Are there alternatives for those who need transportation other than shuttle service.
46. This questionnaire is a heavy-handed attempt to justify an existing decision to change the schedule.
47. This service that is needed.
48. We do not currently use the shuttle service as we can drive, but we support the community having one for those who cannot.
49. We do not use the shuttle bus at this time. That said, we support having the shuttle bus and are willing to pay for bus service as we anticipate there will come a time when we no longer are able to drive ourselves.
50. We do not use the shuttle but wonder if those who do should have to pay a small amount for the service, similar to the fitness pass.
51. With the bus running only three days a week, visits to doctors at the hospital are restricted.
52. Thank you for your diligence re: this issue. Have you considered contracting for a smaller bus? Have you queried other senior living orgs. For cost-saving methods?
53. I would not have been able to have such extensive PT without the use of the shuttle. 2.5yrs/2x weekly. PT was successful and I was able to walk short distances and climb a few stairs. After PT, I used the shuttle for doctor appts. And grocery shopping and shopping at outlets or dept stores. Being confined to a wheelchair, the driver is familiar w/ me and ensure my safety. The shuttle is a needed amenity that is worth its weight in gold. if there is a need to reduce costs, other services such as landscaping, pool operation or CH personnel, etc. could be explored in more detail. I am frequently asked by other condo owners as to the ease of using the bus because they are aware of anticipated changes in their health and might necessitate giving up driving. For future buyers and owners, this amenity is just as important as having a restaurant. We have a great life at LWVA and we must continue this service to make us competitive in the area with other complexes.
54. I would hope the bus would go to the movie theaters: Phoenix, Alamo, Regal. It would be fun for it to go to the One Loudoun Carnival
55. I was promised bus service when I bought here. I imagine it's quite costly, but please find some other way to cut costs. I've paid for the bus since 2011 and have only used it in the last 18 months. For all those paying for it now and not using, I'm sure they were promised bus service and will be glad to

Q12. Additional comments or suggestions:

have it should the need arise. Reducing the frequency will greatly reduce the value to out residents.
56. When I bought the condo 15 years ago the best incentive was transportation. You plan for the future.
57. Keep the current schedule and use the \$7 a month to subsidize a real need. We can use the bus to go out to eat easier than going to an onsite place.
58. The shuttle service is very important to the community and should be available in the future for those who will need it.
59. Some people shop at Harris Teeter and get a senior discount on Thursdays
60. The bus always has several people using the morning and afternoon buses. I have to give up my car because of health concerns so I will use the bus more now. I like it going to all the big grocery store and the retail stores also
61. Most holidays are celebrated on Mondays and this makes it very inconvenient for the bus riders (less day for their bus use). I also feel that the bus should be a priority when deciding on the expenses. Your increase in salary to employees is over the top, given that many of us are on fixed retirement income. You need input from riders. schedule need to be revised.
62. Please keep 4 days of shuttle service!
63. I have lived here for over 20 years and the bus is important, as is, and I'm counting on it.
64. Do not take away any day because we need the bus anytime to get to my appts. I need flexibility.
65. I do believe it's necessary to have bus service. I see much use in TB. Would a smaller vehicle do? Still need the chair lift. Should there be a fee?? If days change, will residents still be able to shop on "senior days"? Many questions and much to consider.
66. I have been living in Lansdowne for 6 years. Wednesday has been trips days (some Sat). I gave up driving 3 years ago. I need the bus the way it is. That's why we move here.
67. We move to Lansdowne that you have a bus. My wife stop driving 3 years ago - this is very important to her health and well being.
68. I'm 82 and can expect a day when I'm no longer able to drive. The shuttle availability was one of the primary reasons and advantages considered when we moved here and I very much want it to continue.
69. Some doctors are available only once a week. Hope I can handle 10+ pounds on lap when bus is crowded. I have to shop for groceries at least twice a week because I can't carry too much.

Q12. Additional comments or suggestions:

70. So sad that you always want to take from seniors how about you stop lawn service each ay to three days a week. You should be ashamed of yourselves for trying to take days away.
71. I have spoken to a lot of residents they want (Tues, Thurs, Friday). A number of them go to their DR's on Tues or Thurs & esp. food shopping on Thurs & Friday.
72. Do we have the option of cancelling Chariots for Hire and utilizing free county services instead
73. An alternative service should be utilized for the few who ride the bus.
74. I used the bus service weekly for my first 3 or 4 years. At the moment I'm fortunate to have a friend take me shopping and appointments. However, that can change and I'd need bus service again.
75. It is a shame that one proven amenity (shuttle service) has to be cut in order to subsidize another (restaurant). Asking Lansdowne to support something we know little about. Signing a contract 3-5 years? Each unit assessed \$7 a month for how many years? Security is the largest expense. Perhaps cuts could be made in that area?
76. We currently are able to drive so we don't need to use the shuttle but know at some point we will rely on it for our shopping/errand needs so we don't want to lose the service.
77. Please keep the current 4 days. My ability to drive myself is diminishing and it is a service I will come to rely on completely. It is one of the features of LWVA that was important to me.
78. We do not house a car. One of the reasons we moved here was that there is a bus.
79. The bus is included in the founding documents. If you cut back, there may be a lawsuit.
80. None of know from day to day when we will only have the shuttle service for Dr. appts - shopping, etc. LWVA definitely needs this service.
81. I am not using it now. But, I know some day I will probably have to. And I hope it will still be available.
82. Driver will lose one day salary! May lose driver!
83. Some medical offices are closed on Friday or Monday. The availability of the shuttle was a significant factor in my choice of Lansdowne Woods.
84. Keep the schedule the way it is.
85. I am handicapped and this service is vital to me. It makes me independent and I get to socialize with others. It is needed for the above also for

Q12. Additional comments or suggestions:

<p>procedures at the hospital, physical therapy, etc. It is necessary to maintain independence and our mental & physical health.</p>
<p>86.If LWVA supports (\$) restaurant perhaps LWVA should support bus. For me and others the bus is a necessity, not an amenity.</p>
<p>87.Consider charging a moderate fee to both regular and occasional riders.</p>
<p>88.I think charging the users a small fee would keep it financially good. If the users had to use Lyft or Uber, they'd pay more - and most don't own a car that costs \$. Then maybe 4 days.</p>
<p>89.Surely there are other ways to cut expenses, the bus is a selling point for new residents and a lifeline for many residents. Thanks for your consideration.</p>
<p>90.Many residents need 4 day service for shopping and medical. Hope there will be no change in service!</p>



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XII.B

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Changes to PR #33 – Purchasing Goods, Procurement of Services, and Competitive Bidding

Last month, the Board of Members reviewed proposed revisions to Policy Resolution #33. The Board requested that management revise certain wording to provide additional clarification regarding spending authority for management. I believe the enclosed revised draft addresses the Board's concerns and more clearly defines the General Manager's purchasing authority. Management recommends approval of the revised policy as presented. The current policy is enclosed for reference.

Draft Resolution

Move to approve the proposed amended and restated Policy Resolution #33: Purchasing Goods, Procurement of Services, and Competitive Bidding.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	MG	83.5				
Bishopp, Fred T., Jr.	RB	114.5				
Gross, Trudy M.	RV	120.5				
Henderson, Wesley C.	OV	7				
Kaiser, Wayne A.	PR	115				
Lavanty, Donald F., Sr.	RB	114.5				
Nyhan, Andrea	BR	119.5				
Norton, Mary K.	RV	120.5				
Phelan, Merrill D.	MG	83.5				
Saine, David V. (proxy to Wayne Kaiser)	PR	115				
Upp, David J.	BR	119.5				
TOTAL VOTES		1113				

Lansdowne Woods of Virginia Community Association, LLC

Policy Resolution #33

PROCEDURES FOR PURCHASES, PROCUREMENT OF SERVICES, AND COMPETITIVE BIDDING

WHEREAS, Article 5, Section 5.1 (5) of the Second Amended and Restated Declaration for Lansdowne Woods of Virginia (“Declaration”) provides that Lansdowne Woods of Virginia Community Association, LLC (“Association”) is charged with adopting rules and regulations not inconsistent with Association Documents;

WHEREAS, Article 1, Section 1.1 (16) of the Declaration establishes that the person appointed pursuant to Article 5, Section 5.6 of the Declaration is the “General Manager” and that this person is responsible for the management and upkeep of the property and the administration of the Association;

WHEREAS, Article 5, Section 5.6 (b) of the Declaration states that the General Manager shall have the right, power, and authority on behalf of the Association and in its name to exercise all of the rights, powers and authority of the Association under the Act and the Association Documents;

WHEREAS, Article 5, Section 5.6 (b) of the Declaration gives the General Manager the authority to:

- 1) Provide goods and services, as well as purchase equipment, supplies and materials to be used by personnel in the performance of their duties;
- 2) Enter into contracts to provide construction, renovation, repair, organizational, managerial or other services; and
- 3) Sign, acknowledge and deliver any and all instruments to effectuate such services; and

WHEREAS, the Members or Board of Members (“Board”) for the Association deems it necessary, in good business practice, and in the best interest of the Association to adopt procedures for the purchase of goods and procurement of services, as well as to establish guidelines for competitive bidding and the contractor selection process.

NOW, THEREFORE, BE IT RESOLVED that the Board adopts the following procedures for purchases, procurement of services, and competitive bidding.

I. SMALL PURCHASES

- A. The General Manager is authorized to spend up to ten thousand dollars (\$10,000) on non-routine goods and services (“Small Purchases”) that are in his/her opinion deemed to be necessary to facilitate the efficient operation of the Association.
- B. Small Purchases shall not require competitive bids or prior approval from any committee or the Board; however, the General Manager shall make reasonable efforts

to obtain the highest quality of goods and services at the best pricing available to the Association.

- C. The General Manager shall inform the Budget & Finance Committee and Board of any Small Purchases through normal financial reporting methods.
- D. Purchasing of goods and services costing over the amount of \$10,000 generally requires prior approval from the Board, except in cases where the expenditure is time sensitive or urgent in nature. In such cases, the General Manager shall inform the Board (via email) of such time sensitive or urgent expenditure exceeding \$10,000, along with justification for the purchase and associated cost, prior to incurring the expense.

II. COMPETITIVE BIDDING PROCEDURE

- A. The Competitive Bidding Procedure shall be followed for any purchases of goods or services costing more than \$10,000.
- B. Whenever feasible, the Association shall solicit bids from no fewer than three qualified bidders. Exceptions shall be made only when there are fewer than three qualified providers of the required goods or services.
- C. The General Manager or a staff member working under the direction of the General Manager (“Management”) shall identify qualified bidders through resources such as Community Associations Institute, prior experience working with bidders, word of mouth, or other industry related recommendations.
- D. Bids will be reviewed by Management and all applicable committees who will recommend to the Board the best qualified bidder based on any or all of the following criteria:
 - 1. Responsiveness to the bid specifications;
 - 2. Bidder’s experience in providing similar goods and services;
 - 3. Estimated purchase costs;
 - 4. Warranties on goods and services;
 - 5. Recommendations of bidder references and references developed independently by Management;
 - 6. Qualifications of bidder’s management and personnel;
 - 7. Location of the bidder’s nearest office or service facility; and
 - 8. Such other criteria that may be deemed relevant.
- E. After review of all bids and Management/Committee recommendations, the Board shall select a bidder and authorize the General Manager to negotiate and execute an agreement based on the bidder’s proposal.
- F. The Board authorizes Management to engage legal counsel expertise in the review and modification of any agreement if deemed necessary by the General Manager and is in the best interest of the Association.
- G. Management shall administer all contracts to ensure conformity with the agreement and fulfillment of the contractor's commitments and responsibilities.

- H. At the discretion of Management, the names of qualified bidders and actual proposals may be redacted from unit owner/residents for the purpose of ensuring that proprietary information is not disseminated.

III. EXPENDITURES OVER \$25,000

In addition to the above processes outlined in Section I and II of this resolution, the following additional processes shall apply to goods and services exceeding an annual cost of \$25,000:

- A. Management shall draft proposed bid specifications and/or a request for proposal (RFP). The applicable committees will review and modify the documents as necessary. If Management or the committee(s) considers it appropriate, they may seek approval or direction from the Board concerning the scope of work prior to proceeding with the next step in the process.
- B. Upon review and modification of the bid specifications/RFP, Management will contact potential bidders to determine their interest in bidding and will send the approved bid specifications/RFP to interested bidders. All prospective bidders will be required to provide evidence of insurance coverage meeting the Association's minimum requirements, any appropriate licenses applicable to their specific trade, and at least three (3) business references.
- C. Upon receipt of all bidder responses, Management and all applicable committees will review the responses, interview bidders if appropriate, check references, and make a recommendation to the Board based on any or all of the criteria outlined in Section II (D) of this resolution.
- D. After review of all bids and Management/Committee recommendations, the Board shall select the best qualified bidder and authorize Management to negotiate an agreement based on the bidder's proposal.
- E. Upon negotiation of an agreement with the qualified bidder, the General Manager will present the draft agreement to the Board for final approval. In some cases, the General Manager may present to the Board the bidder responses and a draft agreement at the same time.
- F. Once the agreement is approved by the Board, the General Manager shall sign, acknowledge and deliver the agreement on behalf of the Association. Per Article 5, Section 5.6 (c) of the Declaration, the agreement may also be signed by the President, Vice President, Secretary, or the Treasurer.

IV. MULTI-YEAR CONTRACTS AND CONTRACT EXTENSIONS

The Board may extend existing contracts with current providers of goods and services whose performance has been satisfactorily provided; however, the period covered by the initial contract and any extensions shall not exceed five years without first soliciting and reviewing competitive bids.

V. BOARD AUTHORITY

The Board may, at its sole discretion, exercise its authority to approve any expenditure of any amount without the necessity for review and recommendation from any applicable committees.

Resolution effective: March 2, 2022

Revised: August 3, 2022

Revised: May 1, 2024

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC

POLICY RESOLUTION #33

**PROCEDURES FOR PURCHASES, PROCUREMENT OF SERVICES,
AND COMPETITIVE BIDDING**

WHEREAS, Section 4.1(b) of the Third Amended and Restated Declaration for Lansdowne Woods of Virginia (“Declaration”) provides that Lansdowne Woods of Virginia Community Association, LLC (“LWVA”) shall be managed by the Board of Members (“Board”) and that the Board shall have all of the powers and duties necessary for the administration of the affairs of the Association;

WHEREAS, Section 4.1(a)(5) of the Declaration provides that LWVA may adopt or amend any reasonable Rules and Regulations not inconsistent with the Articles of Organization (“Articles”), Declaration, and any Supplementary Declarations (“Governing Documents”);

WHEREAS, Section 4.6(b)(9) of the Declaration gives the General Manager the responsibility and authority to (1) provide goods and services, as well as purchase equipment, supplies and materials to be used by personnel in the performance of their duties; (2) enter into contracts to provide construction, renovation, repair, organizational, managerial or other services; and (3) sign, acknowledge and deliver any and all instruments to effectuate such services; and

WHEREAS, the Board deems it necessary, in good business practice, and in the best interest of LWVA to adopt procedures for the purchase of goods and procurement of services, as well as to establish guidelines for competitive bidding and the contractor selection process.

NOW, THEREFORE, BE IT RESOLVED, that the Board adopts the following policy which shall supersede and replace any previously adopted policies and procedures relating to the same or similar subject:

I. DEFINITIONS

For purposes of this Resolution, the following terms shall have the meanings set forth below:

- A. "Routine Operational Expenses" means recurring expenditures necessary for the day-to-day operation, maintenance, administration, and preservation of LWVA, including payments under existing Board-approved contracts and purchases of supplies, materials, utilities, and services customarily required to operate and maintain the property. Examples include utility services, payroll-related expenses, maintenance supplies, janitorial supplies, fuel, software subscriptions, routine repairs, and payments due under existing Board-approved contracts.
- B. "Non-Routine Expenses" means expenditures that are not incurred in the ordinary course of day-to-day operations, including but not limited to contracts, Professional

- Services, capital expenditures, equipment purchases, construction projects, renovations, replacements, restorations, improvements, and reserve-funded projects.
- C. "Small Purchase" means any expenditure not exceeding the Small Purchase Threshold that may be approved by the General Manager in accordance with this Resolution.
 - D. "Small Purchase Threshold" means Ten Thousand Dollars (\$10,000), or such other amount as may be established by the Board from time to time by resolution.
 - E. "Professional Services" means services requiring specialized education, licensing, certification, technical expertise, or professional judgment, including but not limited to legal, engineering, architectural, reserve study, consulting, auditing, environmental, information technology, and similar professional services.
 - F. "Material Expansion of an Existing Contract" means an amendment, change order, renewal, extension, or modification that either increases LWVA's financial commitment by more than the Small Purchase Threshold or materially changes the scope, nature, duration, or level of services provided under the existing contract.
 - G. "Emergency Expenditure" means a Non-Routine Expense that, in the judgment of the General Manager, must be incurred without delay to protect life, health, safety, LWVA property, essential operations, or to avoid substantially increased costs to LWVA.

II. ROUTINE OPERATIONAL EXPENSES

Routine Operational Expenses may be incurred by the General Manager without further Board approval, provided:

- A. The expenditure is included within an approved budget line item;
- B. The expenditure does not involve the award of a new contract, a Material Expansion of an Existing Contract, a capital project, or Professional Services;
- C. The expenditure is consistent with the ordinary course of operations; and
- D. The expenditure is otherwise in compliance with the provisions of this Resolution.

III. SMALL PURCHASES

- A. The General Manager is authorized to approve expenditures of up to the Small Purchase Threshold for any purpose, including Routine Operational Expenses, Non-Routine Expenses, contracts, Professional Services, reserve-funded expenditures, and capital expenditures deemed necessary for the operation, maintenance, administration, or preservation of LWVA property.
- B. Small Purchases shall not require competitive bids or prior approval from any committee or the Board; however, the General Manager shall make reasonable efforts to obtain goods and services at competitive prices and in a manner that provides the best overall value to LWVA.
- C. The General Manager shall inform the Budget & Finance Committee and Board of Small Purchases through normal financial reporting methods.

IV. NON-ROUTINE EXPENSES

- A. The following expenditures shall be deemed Non-Routine Expenses regardless of whether funds are included in the approved annual budget:
 - 1. New contracts;
 - 2. Capital improvements;
 - 3. Reserve-funded projects;
 - 4. Construction, renovation, replacement, or restoration projects;
 - 5. Professional Services;
 - 6. Equipment purchases exceeding the Small Purchase Threshold; and
 - 7. Any expenditure subject to the Competitive Bidding Procedure set forth herein.
- B. The classification of an expenditure as a Non-Routine Expense does not, by itself, determine approval authority. Approval authority shall be governed by the provisions of this Resolution, including the Small Purchase Threshold established herein.

V. EMERGENCY EXPENDITURES

- A. Expenses exceeding the Small Purchase Threshold generally require prior Board approval, except in cases where the expenditure is time sensitive or urgent in nature. In such cases, the General Manager may proceed without prior approval if, in his/her judgment, delay would cause operational disruption, property damage, or increased costs.
- B. The General Manager shall notify the Board (via email) within forty-eight (48) hours, providing justification and documentation of the emergency expenditure.

VI. COMPETITIVE BIDDING PROCEDURE

- A. The Competitive Bidding Procedure shall be followed for Non-Routine Expenses exceeding the Small Purchase Threshold.
- B. Whenever feasible, LWVA shall solicit bids from at least three (3) qualified bidders. The three-bid requirement shall be waived when the goods or services are proprietary, specialized, available from a limited number of vendors, or if the purchase is for ancillary goods and services provided by LWVA's current landscaping contractor.
- C. The General Manager or a staff member working under the direction of the General Manager ("Management") shall identify qualified bidders through resources such as Community Associations Institute, prior experience working with bidders, word of mouth, or other industry related recommendations.
- D. Bids will be reviewed by Management and all applicable committees who will recommend to the Board the best qualified bidder based on any or all of the following criteria:
 - 1. Responsiveness to the bid specifications;
 - 2. Bidder's experience in providing similar goods and services;
 - 3. Estimated purchase costs;
 - 4. Warranties on goods and services;
 - 5. Recommendations of bidder references and references developed independently by Management;

6. Qualifications of bidder's management and personnel;
 7. Location of the bidder's nearest office or service facility; and
 8. Such other criteria that may be deemed relevant.
- E. After review of all bids and Management/committee recommendations, the Board shall select a bidder and authorize the General Manager to negotiate and execute an agreement based on the bidder's proposal.
- F. The Board authorizes Management to engage legal counsel for assistance with the review and modification of any agreement if deemed necessary by the General Manager and in the best interest of LWVA.
- G. At the discretion of Management, the names of qualified bidders and actual proposals may be redacted from unit owner/residents for the purpose of ensuring that proprietary information is not disseminated.

VII. CONTRACT AUTHORITY

Notwithstanding any other provision of this Resolution, the inclusion of an expenditure within the annual budget shall not, by itself, authorize Management to enter into a contract, undertake a Non-Routine Expense, or otherwise commit funds except as expressly authorized by this Resolution or by specific action of the Board.

VIII. MULTI-YEAR CONTRACTS AND CONTRACT EXTENSIONS

The Board may authorize the extension or renewal of existing contracts for periods of up to five years when vendor performance has been satisfactory and pricing remains competitive, provided Management confirms that current rates are within market range.

IX. BOARD AUTHORITY

The Board may, at its sole discretion, exercise its authority to approve any expenditure of any amount without the necessity for review and recommendation from any applicable committees.



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XII.C

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Review Feedback Snow & Ice Removal Coordination and Cost-Sharing Agreement & Determine Next Steps

At the May 6, 2026, Board of Members meeting, the Board directed management to distribute the draft Snow & Ice Removal Coordination and Cost-Sharing Agreement to the Member condominium associations for review and comment. All feedback has now been received. Enclosed are the comments and suggested revisions submitted by Riverbend, Blue Ridge, Magnolias, Potomac Ridge, and Riverview.

After reviewing the comments, I am concerned that we may be too far apart on several issues to reach a mutually acceptable agreement. While we have repeatedly explained that the purpose of this agreement is not to assume control over condominium employees, there must be clear procedures, responsibilities, and lines of communication in place to ensure snow removal operations are coordinated effectively and safely across the community. The agreement is intended to establish operational procedures for coordinating snow removal activities, not to transfer hiring, firing, disciplinary, compensation, or day-to-day supervisory authority from the condominium associations to LWVA.

Some of the concerns raised appear, in my opinion, to extend beyond the intent of the agreement. For example, one response suggests that adopting the agreement could create a dual or joint employer relationship. However, LWVA and the condominium associations already operate under existing Payroll & Benefits Administration and Services Agreements that involve shared human resources functions. As a result of those existing arrangements, there have already been situations where attorneys have viewed the relationship as one of joint employment, and in at least one instance, an insurance carrier viewed LWVA as the actual employer rather than the condominium association. The proposed Snow & Ice Removal Coordination and Cost-Sharing Agreement does not change the existing relationship. Rather, it documents operational procedures that have generally been followed for 25 years to coordinate snow removal activities across the community.

Given the significant differences in opinion, management is obtaining pricing for an alternative approach that would involve contracting snow removal services for all condominium areas currently maintained by condominium personnel. Once that information is available, management recommends that the Board determine whether it wishes to continue pursuing a coordinated snow removal agreement with the condominium associations or instead pursue an alternative service model. At this point, continuing to revise the proposed agreement without a clear indication that consensus can be reached is unlikely to be a productive use of staff or Board resources.

Proposed Resolution:

Move to direct management to obtain pricing for alternative snow removal services for the condominium areas. Upon receipt of that information, the Board shall determine whether to continue pursuing a coordinated snow removal agreement or adopt an alternative service model.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	MG	83.5				
Bishopp, Fred T., Jr.	RB	114.5				
Gross, Trudy M.	RV	120.5				
Henderson, Wesley C.	OV	7				
Kaiser, Wayne A.	PR	115				
Lavanty, Donald F., Sr.	RB	114.5				
Nyhan, Andrea	BR	119.5				
Norton, Mary K.	RV	120.5				
Phelan, Merrill D.	MG	83.5				
Saine, David V. (proxy to Wayne Kaiser)	PR	115				
Upp, David J.	BR	119.5				
TOTAL VOTES		1113				

RE: Board Decisions from 6.28.2026

From Debi Belote <rbmanager@lwva.org>

Date Thu 6/25/2026 1:10 PM

To Audra Reed <audra.reed@lwva.org>

Cc Don Lavanty <PresidentRB@lwva.org>; Marianne Brown <ViceRB@lwva.org>; Susie Pfefferkorn <susie.pfefferkorn@lwva.org>; Taya Lee <rbassistant@lwva.org>

 1 attachment (52 KB)

Debi with Comments & Attorney 260523 Snow Removal Coordination Agreement(3490974.1).docx;



Internal (rbmanager@lwva.org)

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Dear LWVA Board and Management,

Please see the attached.

Riverbend appreciates the opportunity to review the draft Snow and Ice Removal Coordination and Cost-Sharing Agreement and fully supports the goal of maintaining a safe, coordinated, and efficient response to winter weather across the Lansdowne Woods community. We have always participated actively in snow removal efforts and remain committed to continuing that cooperation.

After reviewing the draft, several provisions were identified that appear to create operational or financial inequities for the condominium associations. We believe these issues can be resolved with modest revisions that preserve the spirit of cooperation while ensuring the agreement is fair and sustainable for all parties.

- 1. Labor Cost Allocation** The agreement requires essential employees to work across the entire campus, regardless of their assigned building. While we support coordinated operations, the current language results in each condominium paying for labor performed on other properties. This could create an imbalance if staffing levels differ or if employees from one building are unavailable. We recommend clarifying labor-cost responsibilities so that no condominium subsidizes another.
- 2. Equipment Use and Damage** The agreement encourages sharing of equipment but assigns repair or replacement costs solely to the condominium that owns the equipment—even if the equipment is damaged while being used on LWVA property or another building’s property. We suggest revising this section so that equipment damage is the responsibility of the party on whose property the damage occurs, or alternatively, that LWVA maintains a shared equipment reserve or reimbursement mechanism.
- 3. Scope of GM Authority and Emergency Tasks** We support centralized coordination during snow events; however, the current language gives broad discretion to direct essential employees beyond snow and ice removal. Narrowing this authority to snow-related tasks would help avoid confusion and ensure the agreement aligns with existing employment structures.
- 4. Workers’ Compensation Liability** We appreciate that LWVA accepts responsibility for workers’ compensation costs when an employee is injured outside their home building. This is an important protection and reflects the shared nature of the work. We recommend ensuring this language remains clear and unambiguous in the final version.

Consider inserting this clause: *LWVA shall reimburse any increase in a Member’s workers’ compensation premiums attributable to a claim arising from work performed outside the employee’s home building.*

Overall, Riverbend is not opposed to the agreement or to coordinated snow removal. Our goal is simply to ensure that the responsibilities and risks are allocated fairly among all parties. If LWVA requires broader or campus-wide snow operations

beyond what the condominiums can reasonably support, it may be appropriate to consider supplementing staff with a third-party contractor during major events.

We would welcome the opportunity to discuss these points and work collaboratively toward a revised agreement that supports the safety and well-being of the entire Lansdowne Woods community.

Warm regards,

Debi Belote, CMCA®, AMS®

Riverbend Association Manager

Phone: Office 703.724.7800

19385 Cypress Ridge Terrace, Suite A

Lansdowne, VA.20176

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LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC

SNOW AND ICE REMOVAL COORDINATION AND COST-SHARING AGREEMENT

This Snow and Ice Removal Coordination and Cost-Sharing Agreement (“Agreement”) is made as of _____, _____ by LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC, a Virginia limited liability company (“Association”) and RIVERBEND AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION (“Riverbend”), BLUE RIDGE AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION (“Blue Ridge”), THE MAGNOLIAS AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION (“Magnolias”), THE POTOMAC RIDGE AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION (“Potomac Ridge”), THE RIVERVIEW AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION (“Riverview”), and THE OVERLOOK CONDOMINIUM UNIT OWNERS ASSOCIATION (“Overlook”), collectively referred to as “Members” or individually referred to as a “Member.” *The Association and the Members may be referred to herein collectively as the Parties.*

RECITALS

1. Section 4.1(b) of the Third Amended and Restated Declaration for Lansdowne Woods of Virginia (“Declaration”) recorded among the Loudoun County land records (“Land Records”) as Instrument Number 20250225-0008021 provides that the Association shall be managed by the Association Board of Members (“Board”) and that the Board shall have all of the powers and duties necessary for the administration of the affairs of the Association.

2. Section 6.1(a) of the Declaration provides that the Association shall be responsible for the management and upkeep of all of the Common Area; the cost of such management and upkeep shall be charged to Owners as a Common Expense or Limited Common Expense, depending on the nature of the service provided; and that other specific responsibilities for upkeep and allocation of the costs of upkeep shall be determined by any provisions included in a Supplementary Declaration or as part of a deed of subdivision or deed of easement for a portion of the Property.

3. Section 6.1(e) of the Declaration provides that, to the extent determined to be reasonably necessary or desirable by the Board, the Association may enter into shared maintenance agreements to maintain areas whether or not located within the Property. Such areas may include but are not limited to storm water management or drainage easements and facilities, landscaping, entrance features, signage, trails, sidewalks and areas along streets and roadways.

4. The Members are individual condominium unit owners associations for the condominiums in Lansdowne Woods *as defined and described pursuant in* to Sections 1.22 and 4.2 of the Declaration.

5. The Parties wish to establish snow and ice removal procedures for common or shared areas, spaces, components, and improvements which are not otherwise addressed in the

Declaration or in a Supplementary Declaration and are primarily intended for the use, benefit, and enjoyment of condominium residents.

6. ~~*The Parties The Association and the Members*~~ recognize that effective snow and ice removal is essential to maintain safe access throughout the Lansdowne Woods community and wish to promote coordination, cooperation, and efficient use of personnel, equipment, and resources in responding to snow and ice events.

NOW, THEREFORE, in consideration of the premises and the mutual promises hereinafter set forth and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, ~~*the Parties the Association and the Members*~~ agree to the following terms.

ARTICLE 1 COORDINATION OF SNOW AND ICE REMOVAL

1.1 SNOW AND ICE. The Parties recognize that snow and ice removal requires coordination and the full commitment of essential employees, as defined and outlined in the Association Employee Guidebook, in order to maintain safe access throughout the community. Such coordination and participation shall apply to essential employees regardless of whether they are normally assigned to work for a particular Member as condominium employees or otherwise. ***it appears that the purpose of this agreement is to require all essential employees (maintenance) to assist with snow removal at all of the properties - not just their own.*** The Association's General Manager ("General Manager") will coordinate snow and ice removal activities and provide operational direction to all essential employees to promote timely and efficient snow and ice removal.

~~Other emergency conditions due to inclement weather may necessitate action not anticipated, addressed or outlined in this Agreement. Essential employees may be requested to assist with emergency tasks reasonably necessary to respond to inclement weather conditions as coordinated by the General Manager. Any additional costs incurred to perform such additional actions will be shared in accordance with Article 2 of this Agreement.~~

Requested vs. required? This is also subjective and evidently completely up to the GM to decide when they are needed. I recommend that this entire paragraph be deleted, and this document solely address ice and snow removal.

Nothing in this Agreement shall be interpreted to alter the supervisory relationship between any Member and its condominium employees as may be established under a separate agreement. The General Manager's coordination of snow and ice removal activities under this Agreement shall be for operational purposes only.

1.2 REMOVAL PROCEDURES.

A. Snow and ice removal activities shall be coordinated through the General Manager or the General Manager's designee.

- B.** Member responsibility for removal of snow and ice from hard surfaces shall be in the areas identified in Exhibit A. *Map has been reviewed and it appears to be accurate, by looking at the plats.*
- C. Members *shall make best efforts shall be responsible for* to ensure that access to and from their respective condominium buildings *in the areas identified on Exhibit A* is adequately clear of snow and ice.
- D. *Upon notification, The Association and Members* all essential employees *shall* report promptly for snow and ice removal. Any essential employee that is not able to report promptly for snow and ice removal duty shall notify the General Manager or the General Manager designee. The General Manager or General Manager designee may engage a contractor to assist with snow and ice removal.

Until such contractor assistance arrives, essential employees shall continue clearing snow and ice, regardless of whether the areas being addressed are assigned to the *essential employee's* Member under Exhibit A. The Parties acknowledge that effective snow and ice removal may require essential employees to assist in areas outside their customary areas of responsibility, and the parties agree that such assistance is a normal and expected part of coordinated snow removal operations under this Agreement. *Here is the language that requires essential employees to remove ice and snow across the entire complex, not just at their respective condominium.* Essential employees should cooperate with and assist one another as needed, and the sharing of equipment and *supplies*, when necessary, due to unforeseen circumstances, is encouraged. *This also requires us to share our snow and ice removal equipment and supplies. If it breaks, it is on the Association to pay.*

- E. The General Manager may schedule an annual meeting of all essential employees to review Exhibit A to ensure that responsibilities for snow and ice removal from hard surfaces are clearly understood. *At least once a year*, essential employees will periodically test snow blowers and spreaders to ensure they are fully operational. *Appropriate maintenance shall be performed on the snow removal equipment to keep it operational.* Members *shall make best efforts are responsible for ensuring to ensure* enough de-icing material is available at *its each* condominium building.
- F.** De-icing chemicals should be placed in covered buckets with scoopers in strategic areas, such as entrances and pet walkways and relief areas. Snow shovels shall be available at the main entrance to each building for use by *both* essential employees, residents, and guests. *If we leave the snow shovels for residents and guests, could this open up a liability issue if a resident or guest were injured?*
- G. Essential employees are to pre-treat all hard surfaces, as necessary, according to Exhibit A, with special attention to building entrances and exits. Hard surfaces shall be regularly monitored during snow and ice events, and additional treatment shall be applied as conditions warrant.

H. The ~~Association and the Members Parties~~ acknowledge that building-related emergencies may arise requiring the immediate attention of an essential employee. In such circumstances, the essential employee ~~shall may temporarily~~ prioritize responding to the emergency condition. The General Manager, or the General Manager's designee, shall be notified of the circumstances requiring the employee's reassignment as soon as practicable.

1.3 PRIORITIES AND ORDER OF IMPORTANCE. Snow and ice removal shall follow the order below :

- A. Clearing the main building entrances and primary ~~walkways to ensure safe ingress and egress to buildings~~. All emergency exits must also be cleared to allow unobstructed access in the event of an emergency.
- B. ~~Next, Once primary entrances, emergency exits, and main pedestrian routes are cleared,~~ essential employees shall clear access around fire hydrants, so fire hydrants are clearly visible and accessible to the fire department.
- C. After, ~~critical building~~ access points have been addressed, walkways to pet relief areas will be cleared.
- D. Next, walkways connecting residential buildings to the clubhouse and gatehouse shall be cleared.
- E. Any remaining areas identified by the General Manager as reasonably necessary for safety and accessibility shall be cleared.

ARTICLE 2 SHARED COSTS

2.1 COST ALLOCATION. The ~~Parties The Association and the Members~~ shall share the costs of goods, services, and labor in accordance with this Agreement.

2.2 EQUIPMENT AND SUPPLIES. The Association shall provide and pay for all de-icing materials. Members are responsible for notifying the General Manager, or the General Manager designee, when de-icing materials must be replenished.

Equipment and supplies include, but are not limited to, shovels, spreaders, and snow blowers. Each Member shall provide and pay for all necessary equipment and supplies needed to perform snow and ice removal in ~~its designated in the areas of area of responsibility~~ designated on Exhibit A. The Association shall provide and pay for all necessary equipment and supplies to properly respond to snow and ice removal services in areas that are not the responsibility of the Members. Maintenance and care of such equipment and supplies used by essential employees or contractors shall be the responsibility of the party providing such equipment.

2.3 LABOR COSTS. Members shall be responsible for all labor costs associated with snow and ice removal performed in respective areas of responsibility designated in Exhibit A, and the Association shall be responsible for all labor costs associated with all other common areas. *This means that we will be paying our employees to remove snow in other areas of the community - including other condominium property. This could result in another condominium reaping the benefit of labor from employees of other buildings without having to pay for it. Especially if another essential employee fails to show.*

2.4 MEMBERS WITHOUT CONDOMINIUM EMPLOYEES. If a Member does not have any condominium employees, the Association shall perform or arrange for the performance of snow and ice removal duties. The Association shall invoice the Member for all labor and related costs incurred, and the Member shall reimburse the Association accordingly.

ARTICLE 3 GENERAL PROVISIONS

3.1 TERM. This Agreement will be perpetual from the date of the last signature unless terminated in accordance with Section 3.2 of this Agreement. Changes to any term in this Agreement must be by written amendment executed by all parties.

3.2 TERMINATION. This Agreement may be terminated by the Association or by ~~a supermajority vote of the Members approval by the Boards of Directors of the Members representing more than two-thirds of the total votes allocated to the Members~~ upon ninety (90) days' written notice to all parties. *For purposes of this Section, a "supermajority vote of the Members" means approval by the Board of Directors of the Members representing more than two-thirds of the total votes allocated to the Members.*

Any termination shall not relieve the terminating party of obligations incurred prior to the effective date of termination. In the event this Agreement is terminated, responsibility for snow and ice removal and the associated costs shall revert to the allocation of maintenance and cost responsibilities established under the Declaration, and this Agreement shall thereafter be of no further force or effect.

3.3 FAILURE TO PERFORM. If snow and ice removal responsibilities assigned to a Member under this Agreement are not performed, the Association may, in its sole discretion, perform or cause the required work to be performed and assess the cost of such work to the non-performing Member in an amount equal to the cost incurred by the Association.

3.4 EMPLOYEE INJURIES AND WORKERS' COMPENSATION. The parties acknowledge that essential condominium employees ~~may will~~ perform snow and ice removal in areas outside their respective Member buildings during snow events. In the event an essential condominium employee is injured while performing snow and ice removal in such areas, the Association shall be responsible for any workers' compensation costs, deductibles, or related expenses associated with such injury.

3.5 MODIFICATION. No modification of this Agreement and no authorization for extras or additions or for eliminations or changes in specifications shall be binding on the Parties unless it is in writing and signed by all parties.

3.6 AGREEMENT BINDING ON SUCCESSORS. This Agreement shall inure to the benefit of and be binding on the successors and assigns of all parties.

3.7 AGREEMENT IS COMPLETE UNDERSTANDING OF THE PARTIES. This Agreement constitutes the complete understanding of the parties. For the convenience of the parties, this Agreement may be executed in several counterparts, which are in all respects similar and each of which shall be deemed to be complete, so that anyone may be introduced in evidence or used with any purpose without the production of the other counterparts.

3.8 SEVERABLE. If any part or provision of this Agreement shall be adjudged unlawful or unenforceable under Virginia law, the remainder of this Agreement shall nonetheless survive and remain in full force and effect.

3.9 CONFLICTS. In the event of a conflict in terms between this Agreement, and any exhibits, the terms of this Agreement shall supersede the terms of the exhibits.

3.10 AGREEMENT GOVERNED BY VIRGINIA LAW. This Agreement shall be governed by the laws of the Commonwealth of Virginia. All parties hereto do hereby expressly agree that if legal action is required to interpret or enforce this Agreement, said action shall be filed in the state courts of Loudoun County, Virginia.

3.11 MEDIATION. Before commencing litigation, any dispute shall be submitted to mediation with an agreed upon neutral party. Any such mediation shall take place at the office of the Association at 19375 Magnolia Grove Sq, Leesburg, VA 20176. If litigation is filed, it shall be stayed to allow mediation to occur.

3.12 CAPTIONS & GENDERS FOR CONVENIENCE ONLY. The captions, genders, or titles provided in this Agreement are solely for the sake of convenience, and in no way are intended to, nor shall, modify or limit the meaning of any term or provision of this Agreement.

3.12 ADDRESSES FOR NOTIFICATION. Except as may be otherwise specifically provided in this Agreement, all notices or other communications pertaining to this Agreement shall be directed to the following.

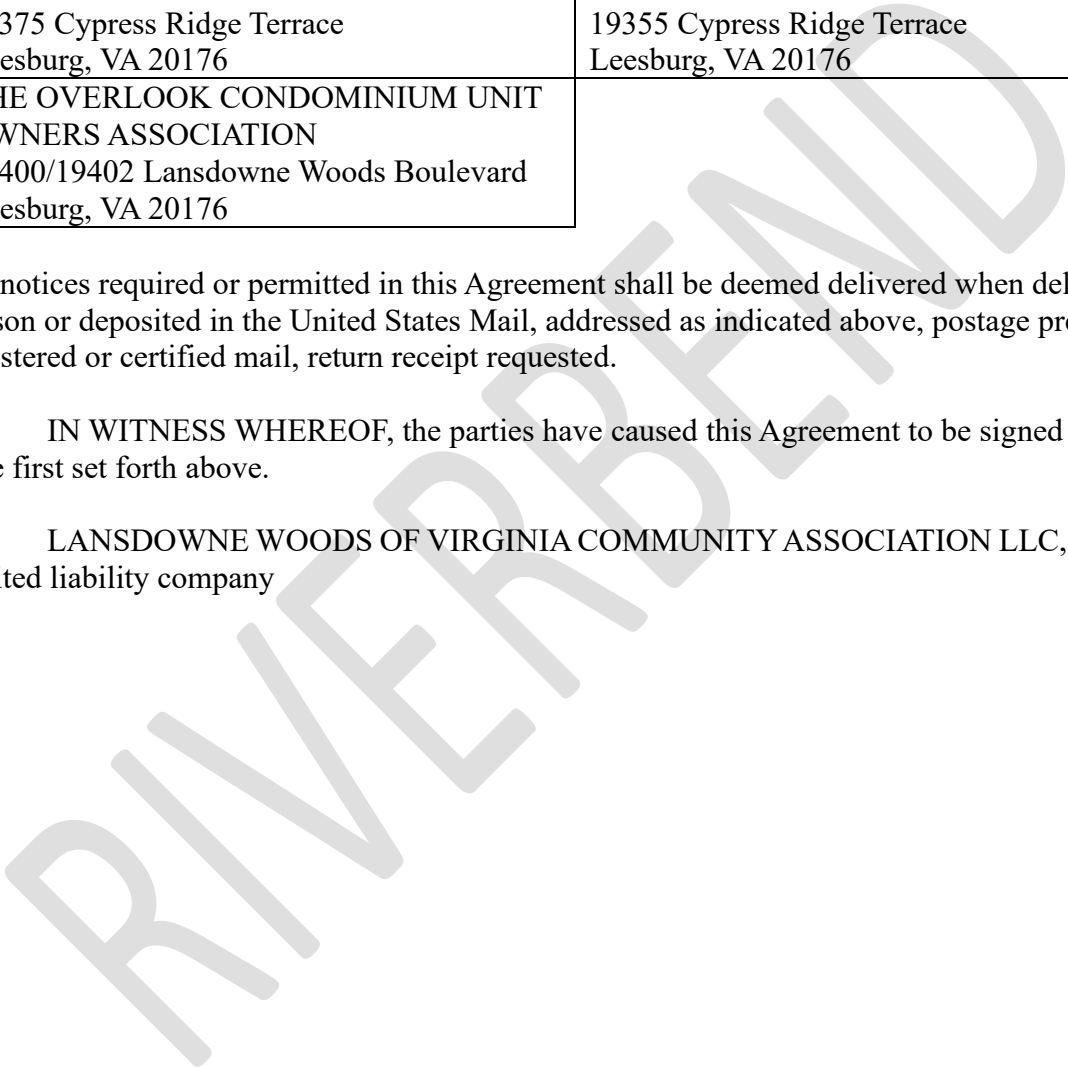
LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC 19375 Magnolia Grove Square Leesburg, VA 20176	THE MAGNOLIAS AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION 19360 Magnolia Grove Square Leesburg, VA 20176
RIVERBEND AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION 19385 Cypress Ridge Terrace Leesburg, VA 20176	THE POTOMAC RIDGE AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION 19365 Cypress Ridge Terrace Leesburg, VA 20176

<p><i>With a copy to:</i></p> <p><i>Ursula Koenig Burgess, Esq.</i> <i>Rees Broome, PC</i> <i>1900 Gallows Road, Suite 700</i> <i>Tysons Corner, VA 22182</i></p>	
<p>BLUE RIDGE AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION 19375 Cypress Ridge Terrace Leesburg, VA 20176</p>	<p>THE RIVERVIEW AT LANSDOWNE WOODS CONDOMINIUM UNIT OWNERS ASSOCIATION 19355 Cypress Ridge Terrace Leesburg, VA 20176</p>
<p>THE OVERLOOK CONDOMINIUM UNIT OWNERS ASSOCIATION 19400/19402 Lansdowne Woods Boulevard Leesburg, VA 20176</p>	

All notices required or permitted in this Agreement shall be deemed delivered when delivered in person or deposited in the United States Mail, addressed as indicated above, postage prepaid, registered or certified mail, return receipt requested.


IN WITNESS WHEREOF, the parties have caused this Agreement to be signed as of the date first set forth above.

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION LLC, a Virginia limited liability company



Blue Ridge Response to Snow Agreement

From Laura Herring <manager.blueridge@lwva.org>
Date Thu 5/28/2026 1:11 PM
To Audra Reed <audra.reed@lwva.org>
Cc Sadie Caceres <asstmanager.blueridge@lwva.org>; Susie Pfefferkorn <susie.pfefferkorn@lwva.org>

 Internal (manager.blueridge@lwva.org)



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Hi Audra,

The Board of Directors met on May 28, 2026, to discuss the snow shared maintenance agreement. In preparation of the meeting our attorney provided three recommended revisions, which the Board has reviewed and is in agreement with two of them. Those two recommendations are below:

1. "Change Section 3.1 (the perpetual term) to five years when it can be reviewed and revised if appropriate."

3.1 TERM. This Agreement will be perpetual from the date of the last signature unless terminated in accordance with Section 3.2 of this Agreement. Changes to any term in this Agreement must be by written amendment executed by all parties.

2. Add language: "The General Manager should coordinate with the building managers especially if the condominium employees are assigned to other buildings for snow removal."

Laura Herring, CMCA®, AMS®, PCAM®
Building Manager

**** PLEASE NOTE MY EMAIL HAS CHANGED TO MANAGER.BLUERIDGE@LWVA.ORG****

Blue Ridge at Lansdowne Woods Condominium
19375 Cypress Ridge Terrace
Lansdowne, VA 20176
O (703-723-6266) F (703-723-6270)

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RE: Snow & Ice Removal Coordination and Cost-Sharing Agreement

From Lynne Moore <magnolias@lwva.org>

Date Tue 6/16/2026 3:07 PM

To Audra Reed <audra.reed@lwva.org>



Internal (magnolias@lwva.org)

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Hello,
I am a bit late on getting this to you.

The Magnolias board would like to have the following added to the agreement

The overtime labor should be the responsibility of LWVA as per the Declaration of Section 6.1
(a). The same with all supplies. This should not be a cost to the Member condo associations

2.2 EQUIPMENT AND SUPPLIES. The Association shall provide and pay for all de-icing materials. Members are responsible for notifying the General Manager, or the General Manager designee, when de-icing materials must be replenished.

Equipment and supplies include, but are not limited to, shovels, spreaders, and snow blowers. Each Member shall provide and pay for all necessary equipment and supplies needed to perform snow and ice removal in the areas of responsibility designated in Exhibit A. The Association shall provide and pay for all necessary equipment and supplies to properly respond to snow and ice removal services in areas that are not the responsibility of the Members. Maintenance and care of such equipment and supplies used by essential employees or contractors shall be the responsibility of the party providing such equipment.

Add language: "The General Manager should coordinate with the building managers especially if the condominium employees are assigned to other buildings for snow removal

Lynne Moore, CMCA, AMS, PCAM
Association Manager
Magnolias Condominium Association
19360 Magnolia Grove Square
Lansdowne, VA 20176
703-858-3444

Potomac Ridge Shared Services Snow Removal Agreement

From Karen Sine <potomacridge@lwva.org>

Date Tue 6/9/2026 4:35 PM

To Audra Reed <audra.reed@lwva.org>

Cc Karen Sine <potomacridge@lwva.org>; wkaiser2367@gmail.com <wkaiser2367@gmail.com>

 2 attachments (1 MB)

Snow Removal Coordination Agreement.pdf; Exhibit A - Snow Removal Map-1 - KS Exclusion.pdf;



Internal (potomacridge@lwva.org)

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The Potomac Ridge Board of Directors has no issues with anything in the attached document with the change in the map as we discussed that would take the yellow area inside the circle away from Potomac Ridge's responsibility.

Let me know if you need anything further from me.

Kind regards,

Karen Sine, CMCA®, AMS®
Association Manager



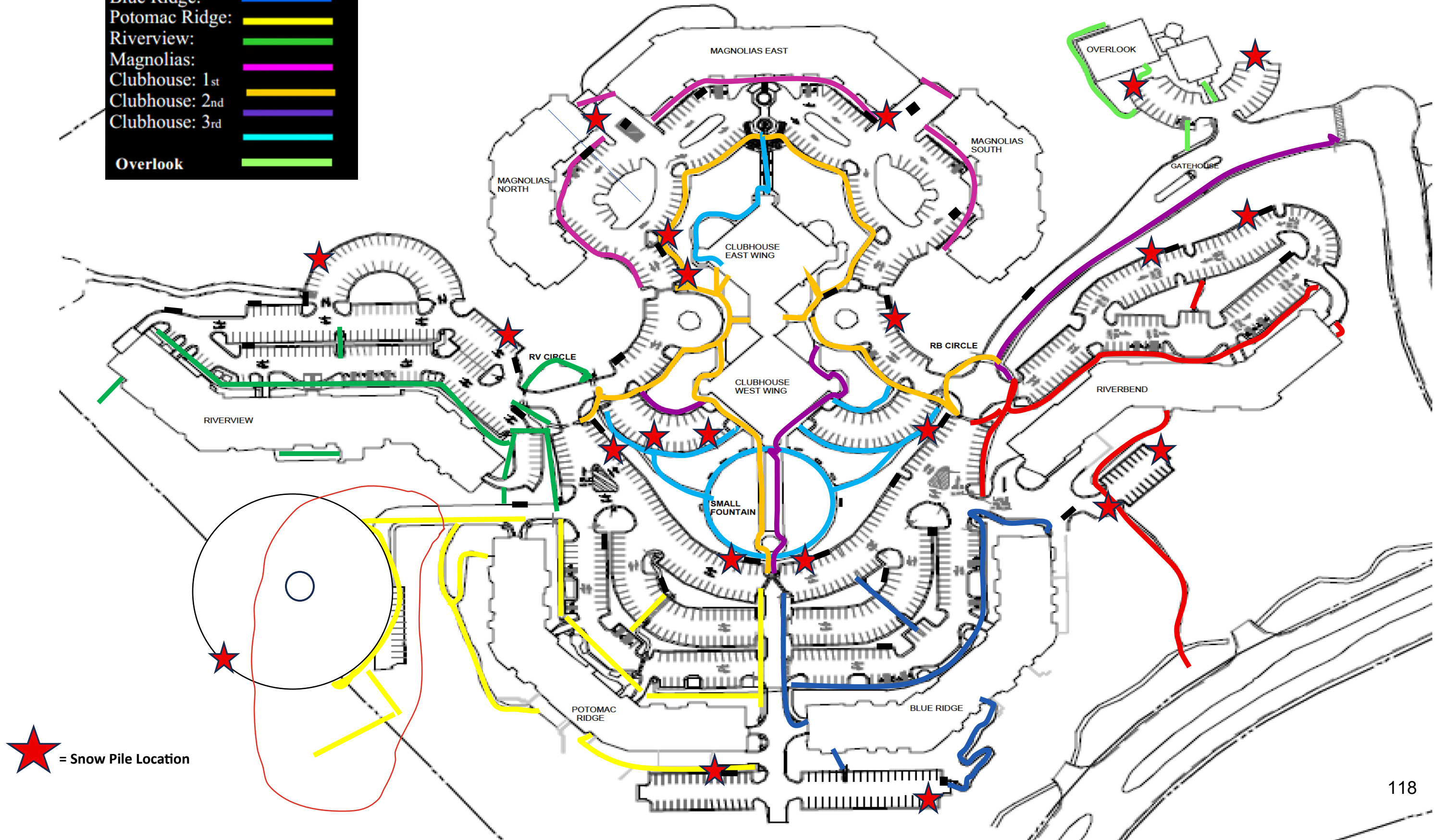
19365 Cypress Ridge Terrace, Lansdowne, VA 20176
(703) 723-9666

EXHIBIT A LANSDOWNE WOODS OF VIRGINIA

Snow Removal Responsibility Map

Revised 1/21/2026

Ledger:	
Riverbend:	Orange
Blue Ridge:	Blue
Potomac Ridge:	Yellow
Riverview:	Green
Magnolias:	Purple
Clubhouse: 1st	Yellow
Clubhouse: 2nd	Purple
Clubhouse: 3rd	Cyan
Overlook	Light Green



LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION SNOW REMOVAL AGREEMENT

June 23, 2026 – RIVERVIEW REPLY

We want to ensure this agreement has the Member's buy-in and set both associations up for long-term success. Currently, the working committee is not fully integrating member feedback. This pattern is creating a discouraging environment and alienating engaged members.

Attorney Comments:

The Riverview Association engaged its attorney to analyze the proposed Shared Maintenance Agreement. This attorney represents three of the buildings in Lansdowne Woods, so the assumption may be made that all three would have been advised of his conclusions. His comments are:

- Labor should be the responsibility of LWVA as per the Declaration, Section 6.1 (a). The same with supplies. This should not be a cost to the Member Condominium Associations.
- The General Manager should work through the Member managers with respect to the snow removal in the immediate areas of the condos. Member employees should only work in the building areas.
- There should be a provision for hiring contractors in significant storms.
- Section 3.1 (the perpetual term) should be 3-5 years so that the agreement may be reviewed and revised if appropriate.

Riverview Comments:

Our engineers must be treated with dignity and respect. To expect them to spend multiple hours behind a shovel or a snow blower and continue to provide regular services to their condominium goes beyond their contractual obligations and puts them at risk of injury. Injuries they might incur doing so will affect not only them but their condominium if they cannot perform their duties. Workers' compensation claims could be compromised.

- Riverview proposes that the system for snow removal used previously be maintained. Member engineers will clear their areas of responsibility as detailed in 1.3 A, B, and C only. Any work beyond this should be the responsibility of LWVA.
- Riverview also accepts responsibility for purchasing their own equipment as listed in 2.2 of the agreement. Doing so allows each building to purchase equipment suited to its needs and budget.

- LWVA must detail a plan for inclement weather that addresses not just the typical snowfall or ice situation. Problems to consider include:
 - Procedures when an unexpected snowfall occurs and engineers are unable to get to site. If a charge is to be levied against the Member Associations, it must be stated up-front and at an unskilled labor rate of pay. The labor should be contracted with the snow removal company. Prior to the snow removal maintenance agreement being signed all members must agree to the proposed fees/costs.
 - Procedures when a snowfall is exceptionally heavy or continues for multiple hours/days.

Concerns with the proposed operation:

- Has LWVA verified that employee injuries won't face workers' compensation complications? Claims can be denied by the primary insurer and shifted to the members policy or denied entirely by the two conflicting entities if workers are outside their respective work areas.
- Operational independence and joint employer liability. Members must maintain supervision of their own essential employees. Turning this direction over to LWVA risks creating a "joint employer" liability.
- Key legal and HR risks of cross-association management.
 - Day-to-day management by LWVA could classify them as joint employers, exposing them to vicarious liability for employee actions, wage/discrimination lawsuits, and collective bargaining obligations.
 - Controlling another entity's staff undermines the legal separation of the two associations.
 - Conflicts of interest: Employees owe loyalty to their direct employer. Dual management compromises this duty, leading to the appearance of favoritism and challenges.
 - Administrative and HR confusion: Cross-association management breaks the chain of command, resulting in disjointed HR practices.

Contract and Budget Protections must be in place.

- Pre-negotiated pricing: The snow removal contract must include a specific, pre-negotiated price list (flat or per-push fees) as an exhibit. Future changes or amendments to the price change list must be approved by all members, prior to being accepted.
- Eliminate open-ended billing: Uncapped time-and-material billing exposes all members to financial risk and rewards contractors for delays.

- **Contract clarity:** The agreement must explicitly define heavy snowfall procedures, trigger depths, multi-pass requirements, clearing of sidewalks, emergency exits, and hourly-per-inch pricing to prevent budget overruns.
- **Backup contingency:** A predetermined backup plan and cost structure must be established with the snow removal company in the event engineers are unable to fulfill their duties.

Summary:

The snow removal arrangement in our community has worked well for twenty-plus years, with each building accepting responsibility for the safety of their residents by keeping public areas clear of snow and ice. This arrangement does not need to be altered. What do need to be in place are procedures for non-typical situations such as extreme weather conditions or engineers not being able to make their way into work. A plan anticipating those problems and the costs associated with them must be in place.



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XIII.A

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Garden Plots Retimbering Project

Earlier this year, the Building & Grounds Committee decided to postpone any retimbering work on some of the garden plots for approximately one year while those plots are evaluated and a long-term plan for possible re-arranging of plots is developed. However, the garden plots located behind Potomac Ridge are not part of that evaluation and are expected to remain. Therefore, staff recommends moving forward with retimbering those plots this fall.

When we started the first phase of the garden plot retimbering project several years ago, it was extremely difficult to obtain contractor interest and competitive pricing. As previously communicated, staff has again encountered challenges in obtaining multiple bids for this specialized project. The limited contractor availability and interest in performing this type of work has made it difficult to get competing proposals.

Yellowstone Landscape submitted a proposal in the amount of \$33,200 for demolition, disposal, installation of new 6" x 6" timbers, and installation of asphalt millings between the plots. Fortunately, staff was able to identify one additional contractor willing to perform the work. Staff also obtained a proposal from David RR Construction in the amount of \$17,360. The scope includes demolition and disposal of the existing timbers, construction of new ones using 6" x 6" pressure-treated timbers, and installation of gravel and sand dust between the plots.

Building & Grounds Committee Recommendation:

From their June 11, 2026, meeting: Garden Plots Retimbering Project (Section behind Potomac Ridge) Motion to recommend to the BOM approval of the proposal from David RR Construction for the retimbering of the garden plots behind Potomac Ridge, with work to be completed in Fall 2026 by Tom Landucci, seconded by MaryAnn Muller-Davis. The Motion was approved by a vote of 7 yes, 2 No (Fritts, Williams).

Budget & Finance Committee Recommendation

From their June 23, 2026, meeting: It was moved by Barry Riordan and seconded by Bill Thomas to recommend that the Board of Members approve funding the garden plots retrimbering project behind Potomac Ridge, in the amount of \$17,360, as a replacement reserve expenditure. Vote: 2 “abstain” and 6 “in favor.”

Management Recommendation:

The David RR Construction proposal provides a large cost savings while still accomplishing the project's objectives. We recommend that the Board authorize management to proceed with the retrimbering of the Potomac Ridge garden plots this fall and recommend approval of the David RR Construction proposal.

Proposed Motion:

Move to approve the proposal from David RR Construction for the retrimbering of the garden plots behind Potomac Ridge, with work to be completed in Fall 2026, at a cost of \$17,360 to be paid with replacement reserve funds.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	Magnolias - Rep 1	83.5				
Bishopp, Fred T., Jr.	Riverbend - Rep 2	114.5				
Gross, Trudy M.	Riverview - Rep 2	120.5				
Henderson, Wesley C.	Overlook -Rep 1	7				
Kaiser, Wayne A.	Potomac Ridge - Rep 1	115				
Lavanty, Donald F., Sr.	Riverbend - Rep 1	114.5				
Nyhan, Andrea	Blue Ridge - Rep 1	119.5				
Norton, Mary K.	Riverview - Rep 1	120.5				
Phelan, Merrill D.	Magnolias - Rep 2	83.5				
Saine, David V. (proxy to Wayne Kaiser)	Potomac Ridge - Rep 2	115				
Upp, David J.	Blue Ridge - Rep 2	119.5				



Proposal #: 679847

Date: 3/31/2026

From: Edgar Luna

**Tree Care Proposal for
Lansdowne Woods of Virginia CA**

Audra Reed

Lansdowne Woods of Virginia CA

19375 Magnolia Grove

Lansdowne, VA 20176

audra.reed@lwva.org

LOCATION OF PROPERTY

19375 Magnolia Grove

Lansdowne, VA 20176

Potomac Ridge plots retimber

DESCRIPTION	AMOUNT
Labor to Demo plots	\$2,325.75
Dump Fee	\$500.00
Labor to Install Plots	\$6,822.20
6'x6'x8' Timbers	\$19,950.00
spike nails	\$2,000.00
Labor to install Asphalt millings	\$1,162.88
asphalt millings	\$393.75

Yellowstone will remove and dispose of all existing timbers on the seven garden plots located behind Potomac Ridge. All debris resulting from the demolition will be hauled off-site.

The existing soil and plant material will remain in place. Yellowstone will install new pressure-treated 6" x 6" timbers, matching the original layout and specifications of each plot. Yellowstone will also add three (3) inches of asphalt millings between each section.

Warranty: Workmanship, Plants, and materials are covered under a limited one-year warranty.

Terms and Conditions: Signature below authorizes Yellowstone to perform work as described in this proposal and verifies that the prices and specifications are hereby accepted. This quote is firm for 30 days and change in plans or scope may result in a change of price. All overdue balances will be charged a 1.5% a month, 18% annual percentage rate.

Limited Warranty: Plant material is under a limited warranty for one year. Transplanted material and/or plant material that dies due to conditions out of Yellowstone's control (i.e., Act of God, vandalism, inadequate irrigation due to water restrictions, etc.) shall not be included in the warranty.

AUTHORIZATION TO PERFORM WORK:

By _____

Print Name/Title

Date _____

Lansdowne Woods of Virginia CA

Subtotal	\$33,200.00
Sales Tax	\$0.00
Proposal Total	\$33,200.00

THIS IS NOT AN INVOICE

David RR construction LLC
 724 N STERLING BLVD
 VA 20164

Estimate

Name/Address
LANSDOWNE WOOD of virginia 19375 magnolia grove square lansdowne va 20176 (703) 723-1501ext 105

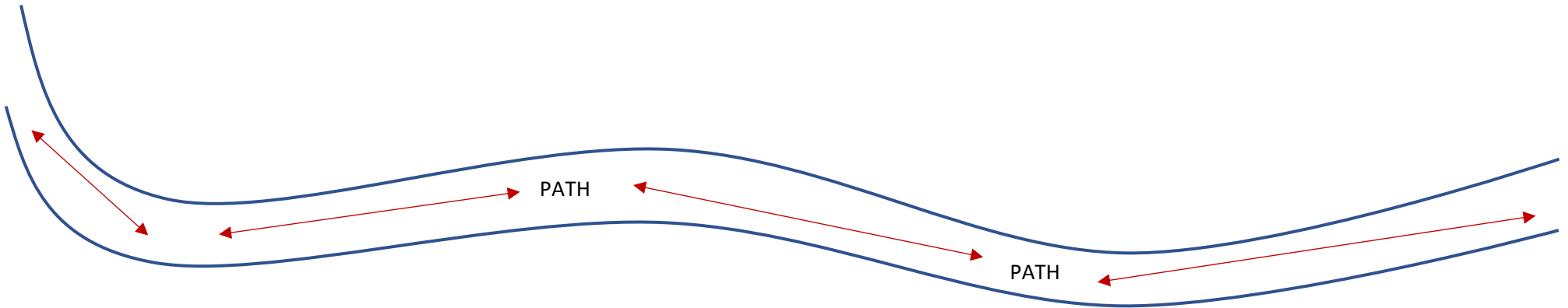
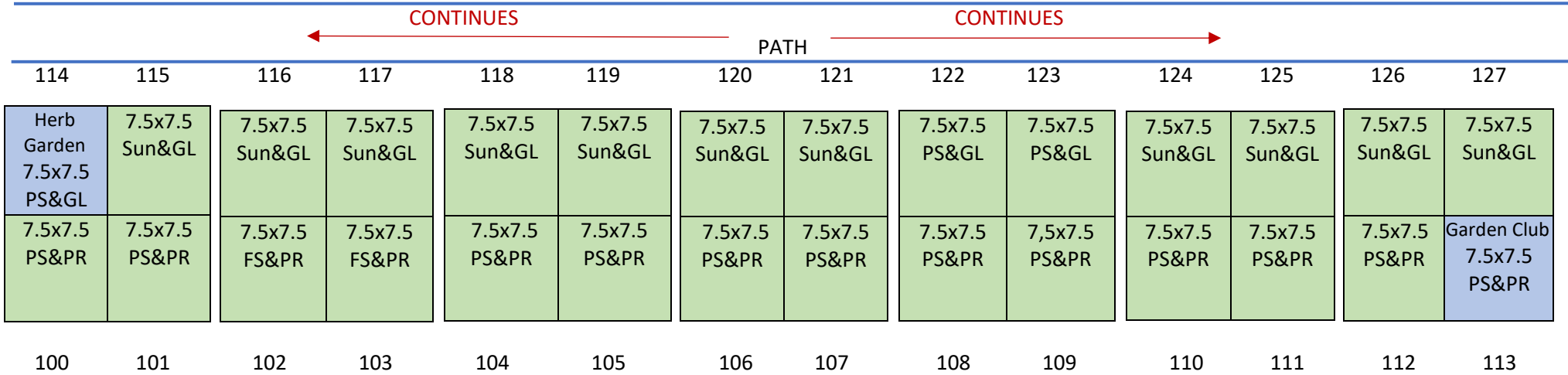
Date	Estimate No.	Project
04/07/26	62021529	

Item	Description	Quantity	Cost	Total
	#1 pine presured tread raised box with 6"x6" timbers 16'x16' with two line of timbers across on center of box remove and disposal, building new timber raised box material and labor	1	3,200.00	3,200.00
	#2 raised box material and labor		2,080.00	2,080.00
	#3 raised box material and labor		2,080.00	2,080.00
	#4 raised box material and labor		2,240.00	2,240.00
	#5 raised box material and labor		2,080.00	2,080.00
	#6 raised box material and labor		2,240.00	2,240.00
	#7 raised box material and labor		2,240.00	2,240.00
	gravel and sand dust between all the raised box material and labor		1,200.00	1,200.00
			Total	\$17,360.00



Garden Plots

Location: Behind Potomac Ridge



FS = Full Shade/about 0 to 3 hours of Sun per day.
 PS= Partial Sun/about 3 to 5 hours of Sun per day.
 Sun= Full Sun/about 5 to 8 hours of Sun per day.

GL = Ground Level Garden / 1 to 2 timbers high
 PR = Partially Raised Garden / 2 to 3 timbers high
 R = Raised Garden / 3 to 5 timbers high



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XIII.B

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Architectural Design Review – Potomac Ridge Unit #118

Attached is a request from the owner of Unit 118 in Potomac Ridge, seeking approval to install a series of bluestone steppingstones within the Limited Common Element yard appurtenant to their unit. The proposed improvement would create a pathway from the rear steps of the unit to the existing gate and would utilize materials that are similar in appearance to existing pavers already located within the yard area.

While the yard area is a Limited Common Element assigned exclusively to the unit owner, alterations to Limited Common Elements that are visible from the Common Area require approval by LWVA in accordance with Policy Resolution #12. Potomac Ridge management has reviewed the request and approved it at the condominium level, contingent upon receiving LWVA approval prior to installation.

The application includes photographs of the existing yard area, a contractor proposal, and proof of insurance from the contractor. The proposed pathway consists of seven natural bluestone steppingstones installed between the rear steps and the gate.

The proposed modification appears to be minor in nature, aesthetically compatible with the surrounding area, and should not adversely impact neighboring units or the Common Area.

Building & Grounds Committee Recommendation:

From their June 11, 2026, meeting: Motion that the BOM approve the request submitted by the owner of Potomac Ridge Unit 118 to install bluestone steppingstones within their Limited Common Element yard appurtenant to the unit, in accordance with the plans submitted with the application. Motion to approve by Joe Gibson, seconded by Tuck Williams. Approved Unanimously.

Management Recommendation:

Management supports the Building & Grounds Committee’s recommendation and suggests the Board approve the application.

Proposed Motion:

Move to approve the request submitted by the owner of Potomac Ridge Unit 118 to install bluestone steppingstones within their Limited Common Element yard appurtenant to the unit, in accordance with the plans submitted with the application.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	MG	83.5				
Bishopp, Fred T., Jr.	RB	114.5				
Gross, Trudy M.	RV	120.5				
Henderson, Wesley C.	OV	7				
Kaiser, Wayne A.	PR	115				
Lavanty, Donald F., Sr.	RB	114.5				
Nyhan, Andrea	BR	119.5				
Norton, Mary K.	RV	120.5				
Phelan, Merrill D.	MG	83.5				
Saine, David V. (proxy to Wayne Kaiser)	PR	115				
Upp, David J.	BR	119.5				
TOTAL VOTES		1113				

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC

Application for Alteration to Limited Common Element (PR #12)

DATE: 5/14/2026
 TO: Lansdowne Woods of Virginia Building & Grounds Committee/Board of Members
 UNIT OWNER NAME: Teresa Drummond
 BUILDING/UNIT #: 118
 CONTACT PHONE: _____
 CONTACT EMAIL: _____

In accordance with Lansdowne Woods of Virginia Policy Resolution #12, Guidelines for Alterations to Limited Common Elements, I/we hereby request a modification to the limited common element:

_____ appurtenant to unit # 118 in Potomac Ridge.
 (Limited Common Element) (Unit #) (Building)

Description of the alteration/modification requested (include all specifications including location/placement, materials to be used, color, designs, etc.). Attach diagrams, drawings, and/or photographs of the proposed alterations.

7 Pavers to be placed from step to the gate - same pavers that are already in the yard

Signature of Applicant: Teresa Drummond 5/14/2026
 Date

This application was reviewed by the Building & Grounds Committee on _____ (date) and the Building & Grounds Committee makes the following recommendation to the Board of Members:

 Building & Grounds Committee Chairperson Date

This application was reviewed by the LWVA Board of Members on _____ (date), and is approved subject to the following stipulations (list any conditions of approval):

 General Manager Date

#

ARCHITECTURAL APPROVAL / DENIAL FORM	
APPLICATION FOR APPROVAL OF ADDITIONS, ALTERATIONS, OR IMPROVEMENTS	
HOMEOWNER(S)	Teresa Drummond
UNIT	PR#118
ALTERATION TYPE	<input checked="" type="checkbox"/> MINOR <input type="checkbox"/> MAJOR
MODIFICATION	Add matching pavers to the backyard to from the step to the gate
DATE RECEIVED	05 / 14 / 2026 Is Submission Complete? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO If No, Date of Complete Submission: ____ / ____ / ____
CHECKLIST	<input type="checkbox"/> COI <input type="checkbox"/> BUSINESS LICENSE
ACTION TAKEN	
<input checked="" type="checkbox"/> APPROVED AS SUBMITTED <input type="checkbox"/> APPROVED WITH PROVISIONS (SEE BELOW) <input type="checkbox"/> DENIED (REASON FOR DENIAL – SEE BELOW) <input type="checkbox"/> DENIED (PENDING ADDITIONAL INFO – SEE BELOW)	
COMMENTS/PROVISIONS/REASON FOR DENIAL/ADDITIONAL INFO REQUESTED	
This project has been approved by management at Potomac Ridge, but this must be approved by LWVA prior to installation. Potomac Ridge Management has forwarded it to LWVA for review and approval.	
MANAGEMENT RESULTS	
<input checked="" type="checkbox"/> Approved by Management <input type="checkbox"/> Denied by Management	

Karen L. Sine

05/19/2026

Management Signature

Date

**APPLICATION for APPROVAL of MINOR ADDITIONS,
ALTERATIONS, or IMPROVEMENTS**

(This application is submitted by the following unit owner(s) for approval of the noted proposed alterations to the listed unit. Attach an additional sheet if more space is needed.)

UNIT OWNER(S) NAME: Teresa Drummond
TELEPHONE: _____

UNIT NUMBER 118

Minor Addition, Alteration, or Improvement Requested - *See submitted attachment - Powers - stepping stones in the yard.*

HVAC Equipment:

- Humidifier Air Cleaner EZ Trap and Wet Switch Furnace AC

In-Unit Decorative Request (if using a contractor):

- Painting
 Window Treatment(s) Type _____
 Countertops Location(s) _____

Flooring Replacement:

- From:** Carpet Laminate Linoleum/LVP Tile Wood
To: Carpet Laminate Linoleum/LVP Tile Wood

Appliance Replacement (Like for Like ONLY):

- Refrigerator Stove Microwave Dishwasher Washer Dryer

Replacement of Existing Electrical/Plumbing Equipment:

- Light fixture(s) & Location _____
 Chandelier(s) & Location _____
 Electrical Switch(es) & Location _____
 Faucet(s) & Location _____
 Toilet(s) & Location _____
 Garbage Disposal _____
 Other _____

Installation of the Following:

- Electrical Outlet(s) Location _____
 Electrical Switch(es) Location _____
 Ceiling Fan(s) Location _____

**APPLICATION for APPROVAL of MINOR ADDITIONS,
ALTERATIONS, or IMPROVEMENTS**

The certified/licensed company/contractor who will perform the work:

Name: Orbal Durand Telephone: 703-447-5018
Email: Valentine Designs Company website: www.facebook.com/ValentineDesignsLandscape

I hereby certify that:

- I have obtained a copy of all relevant guidelines regarding this change, and that the installation will be done in accordance with these guidelines.
- I agree to comply with a Commonwealth of Virginia and Loudoun County ordinances and making such changes, including obtaining all required permits.
- I will inform Management of actual start and completion dates.
- I will ensure that all contractor personnel are aware of the guidelines.
- Attached is a copy of the contractor's certificate of liability insurance showing the Owner(s) name and business license of the contractor.

Unit Owner signature Juan Durand Date 5/5/26
Unit Owner signature N/A Date _____

CHECKLIST FOR MANAGEMENT USE ONLY

DATE RECEIVED 5/5/26 Number _____ Pictures on 5/14
Management Approval Date: 5/19/26 Approval Expires On: _____
Disapproval Date: _____

Plumbing:

- Verified that shut off valves worked prior to installation.
- Scheduled valve replacement with licensed plumber if valves did not work.
- Verified that burst proof hoses used.
- Verified that hose washers were replaced.

Flooring:

- Carpet and/ or rugs are placed on a minimum 80% of flooring (except luxury vinyl flooring, balconies, bathrooms, closets, kitchens, and laundry rooms).

Scheduling:

- Scheduled contractors and deliveries of materials.

Other: _____

Project Start Date: _____ Project Completion Date: _____
Compliance Inspection Date & Inspector: _____



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/05/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER The Hilb Group of Maryland, LLC 3601 MacCorkle Ave, Ste 50 Charleston WV 25304	CONTACT NAME: CL Internal Client Care PHONE (A/C, No, Ext): E-MAIL ADDRESS:	FAX (A/C, No):	
	INSURER(S) AFFORDING COVERAGE		NAIC #
INSURED Richard Valentine 211 Newbury Pl Sterling VA 20164-1225	INSURER A: Nationwide Assurance Company		10723
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

COVERAGES

CERTIFICATE NUMBER: 26-27 Master

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ACPCG012483143442	03/14/2026	03/14/2027	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 100,000
							MED EXP (Any one person)	\$ 5,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 1,000,000
							PCPRM	\$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> 19 <input checked="" type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY			ACPBA012483143442	03/14/2026	03/14/2027	COMBINED SINGLE LIMIT (Ea accident)	\$ 300,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
							ROLLS	\$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE	OTH-ER
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**
 Lansdowne Woods of Virginia Community Association
 19375 Magnolia Grove Square

Leesburg

VA 20176

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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ESTIMATE

Date	Estimate #
4/9/2026	EST-26011-R

211 Newbury Place
Sterling, VA 21064 www.valentinedesigns.net
cell (703) 447-5018

Name / Address
Teresa Drummond 19365 Cypress Ridge Terrace Unit #118 Leesburg, VA 20176

Description of Services	Qty	Rate/Price	Total
<p>BLUESTONE STEP STONES</p> <p>Create a Stone Path from Back Step to Back Gate using 24" x 24" x 1.5" Natural Blue Stone</p> <p>Natural Bluestone 24" x 24" x 1.5" thick Delivery & Labor</p> <p><i>7 Stones laid as Stepping stones from "step" off the back of fence to gate</i></p>	7		
<p>Deposit Required; Balance Due at Time of Completion.</p> <p><i>Will be paid with the existing...</i></p>		<p>Total</p>	







**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XIII.C

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Responsibility for Underground Utility Structure

Based on the attorney's opinion, the Declaration is ambiguous with regard to responsibility for underground utility infrastructure at LWVA. The Declaration does not expressly state who is responsible for an underground utility line located in Common Area that serves only one condominium. In correspondence to the Board, counsel specifically recommended either amending the governing documents or entering into maintenance agreements. She noted that a Board resolution cannot actually amend the Declaration.

That said, if the Board wishes to interpret the Declaration to mean that LWVA is responsible for underground utility infrastructure located in Common Area up to the building footprint, it may do so by adopting a resolution. Such a resolution would acknowledge the ambiguity in the governing documents, establish the Board's interpretation, and provide a consistent standard for handling these issues going forward. It would also make clear that the resolution is intended as an administrative policy and interpretation, not an amendment to the Declaration.

At the Board's request, I drafted an initial version of Policy Resolution #41 for the Board's review and consideration. The draft is intended to memorialize the Board's interpretation and establish a consistent framework for handling responsibility for underground utility infrastructure going forward.

Recommended Motion:

Move that the Board of Members adopt Policy Resolution #41, Responsibility for Underground Utility Infrastructure, as presented (or amended), establishing the Board's interpretation that underground utility infrastructure located within LWVA Common Area is the responsibility of LWVA up to the building footprint, and further recognizing that this resolution is intended as an

administrative policy and interpretation of the governing documents and not as an amendment to the Declaration.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	MG	83.5				
Bishopp, Fred T., Jr.	RB	114.5				
Gross, Trudy M.	RV	120.5				
Henderson, Wesley C.	OV	7				
Kaiser, Wayne A.	PR	115				
Lavanty, Donald F., Sr.	RB	114.5				
Nyhan, Andrea	BR	119.5				
Norton, Mary K.	RV	120.5				
Phelan, Merrill D.	MG	83.5				
Saine, David V. (proxy to Wayne Kaiser)	PR	115				
Upp, David J.	BR	119.5				
TOTAL VOTES		1113				

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC

POLICY RESOLUTION #41

RESPONSIBILITY FOR UNDERGROUND UTILITY INFRASTRUCTURE

WHEREAS, Section 4.1(b) of the Third Amended and Restated Declaration for Lansdowne Woods of Virginia ("Declaration") provides that the Board of Members ("Board") shall have all powers and duties necessary for the administration of the affairs of Lansdowne Woods of Virginia Community Association, LLC ("LWVA");

WHEREAS, Section 4.1(a)(5) of the Declaration authorizes the Board to adopt and amend reasonable Rules, Regulations, and Policies governing the administration, operation, use, maintenance, repair, replacement, and management of the Common Area and Association responsibilities;

WHEREAS, Section 6.1 of the Declaration provides that LWVA is responsible for the management and upkeep of the Common Area, including improvements located thereon;

WHEREAS, questions have arisen regarding responsibility for the maintenance, repair, replacement, restoration, and operation of underground utility infrastructure located within LWVA Common Area that serves one or more condominium associations within Lansdowne Woods;

WHEREAS, the Board has reviewed the governing documents and has determined that establishing a uniform policy regarding such infrastructure is in the best interests of LWVA and its Members;

WHEREAS, the Declaration does not expressly allocate maintenance responsibility for certain underground utility infrastructure located within Common Area and serving one or more condominium associations; and

WHEREAS, the Board finds that establishing a uniform allocation of maintenance responsibility promotes consistency, efficient maintenance, budgeting, and the health, safety, convenience, comfort, and general welfare of the residents of Lansdowne Woods;

NOW, THEREFORE, BE IT RESOLVED that the Board adopts the following policy:

I. PURPOSE

The purpose of this Resolution is to establish a uniform policy regarding responsibility for underground utility infrastructure located within LWVA Common Area.

II. DEFINITIONS

For purposes of this Resolution, "Underground Utility Infrastructure" shall include underground water distribution lines, fire suppression lines, sanitary sewer lines, storm

drainage systems, gas lines, electrical distribution facilities, communication and data conduits, cable facilities, and all associated valves, fittings, manholes, vaults, meters, junction boxes, appurtenances, and related underground utility components.

III. MAINTENANCE RESPONSIBILITY POLICY

- A. LWVA shall be responsible for the maintenance, repair, replacement, restoration, operation, and upkeep of Underground Utility Infrastructure located within LWVA Common Area up to the exterior footprint of the building served, regardless of whether such infrastructure serves a single condominium association or multiple condominium associations.
- B. Notwithstanding any other provision of this Resolution, LWVA shall not be responsible for utility facilities owned, maintained, repaired, or replaced by a public utility provider, governmental authority, or other third party.
- C. Responsibility for utility infrastructure, piping, equipment, fixtures, systems, and components located within a building, attached to a building, or located beyond the exterior footprint of the building shall remain the responsibility of the condominium association responsible for that building unless otherwise provided by the governing documents or a written agreement approved by the Board.
- D. In the event of uncertainty regarding the location of the point of responsibility, ownership, or maintenance obligation, the Board shall have the authority to determine the allocation of responsibility based upon available engineering, survey, utility, construction, and other relevant information.
- E. Nothing in this Resolution shall alter ownership of any utility infrastructure or modify any maintenance obligations expressly established by the Declaration, Supplementary Declarations, condominium governing documents, easements, contracts, or applicable law.

IV. IMPLEMENTATION

- A. Management is authorized to arrange for inspections, maintenance, repairs, emergency services, replacements, and related work necessary to fulfill the responsibilities established by this Resolution.
- B. Costs incurred by LWVA pursuant to this Resolution shall be treated as Association expenses and allocated in accordance with the governing documents and applicable budgetary procedures.

V. LIMITATION

This Resolution is intended solely as a statement of Board policy for administrative purposes. Nothing herein shall be construed as an amendment to the Declaration, any Supplementary Declaration, or any condominium governing documents. In the event of a conflict between this Resolution and the governing documents, the governing documents shall control.

VI. EFFECTIVE DATE

This Resolution shall become effective immediately upon adoption by the Board and shall apply prospectively to maintenance, repair, replacement, and restoration activities occurring after its effective date.



**BOARD OF MEMBERS MEETING
JULY 1, 2026**

AGENDA ITEM XIII.D

To: Board of Members

From: Audra J. Reed, CMCA[®], AMS[®], PCAM[®]
General Manager

Re: Evaluation of the 2021 Strategic Plan and Determine Next Steps

The Board adopted the Association's current Strategic Plan in November 2021 following the work of the Strategic Planning Group. The plan was intended to serve as a guide to the Association's long-term planning and priorities while being reviewed and updated periodically as community needs evolve.

It has now been approximately 5 years since the Strategic Plan was developed. In addition, Policy Resolution #23, Strategic Planning Group, states that the Board generally anticipates a comprehensive strategic planning review approximately every 5 years, or at such other intervals as the Board determines appropriate. I have enclosed a copy of the recently revised Policy Resolution #23 for your convenience and reference.

A review of the plan would provide the Board with an opportunity to evaluate progress, determine whether existing goals remain relevant, identify new priorities, and decide whether revisions are warranted. Management requests direction from the Board regarding whether it wishes to initiate a review and update of the 2021 Strategic Plan at this time. If so, the Board may wish to establish a new Strategic Planning Group in accordance with Policy Resolution #23 to review the existing plan, solicit community input as appropriate, and present recommendations for Board consideration.

Management recommends that the Board review the 2021 Strategic Plan and determine whether it wishes to initiate a strategic planning update. Given that the plan has reached the 5-year review period contemplated by both the Strategic Plan and Policy Resolution #23, Management believes it is an appropriate time for the Board to evaluate whether the Association's long-term goals and priorities continue to reflect the needs of the community. Should the Board decide to proceed, Management recommends establishing a Strategic Planning Group to conduct the review and develop recommendations for the Board's consideration.

Proposed Motion:

Move to establish a Strategic Planning Group in accordance with Policy Resolution #23 for the purpose of reviewing and updating the 2021 Strategic Plan, request each Member condominium association and The Vistas appoint one owner or resident to serve on the Group, and direct Management to present the proposed appointments to the Board for approval.

<u>Member Representative</u>	<u>Member</u>	<u>Votes</u>	<u>Yes</u>	<u>No</u>	<u>Abstain</u>	<u>Absent</u>
Berger, Barry A.	MG	83.5				
Bishopp, Fred T., Jr.	RB	114.5				
Gross, Trudy M.	RV	120.5				
Henderson, Wesley C.	OV	7				
Kaiser, Wayne A.	PR	115				
Lavanty, Donald F., Sr.	RB	114.5				
Nyhan, Andrea	BR	119.5				
Norton, Mary K.	RV	120.5				
Phelan, Merrill D.	MG	83.5				
Saine, David V. (proxy to Wayne Kaiser)	PR	115				
Upp, David J.	BR	119.5				
TOTAL VOTES		1113				

LANSDOWNE WOODS OF VIRGINIA COMMUNITY ASSOCIATION, LLC

POLICY RESOLUTION #23

STRATEGIC PLANNING GROUP

WHEREAS, Section 4.1(b) of the Third Amended and Restated Declaration for Lansdowne Woods of Virginia (“Declaration”) provides that Lansdowne Woods of Virginia Community Association, LLC (“LWVA”) shall be managed by the Board of Members (“Board”) and that the Board shall have all of the powers and duties necessary for the administration of the affairs of LWVA;

WHEREAS, Section 4.1(a)(5) of the Declaration provides that LWVA may adopt and amend reasonable Rules and Regulations not inconsistent with the Articles of Organization (“Articles”), Declaration, and any Supplementary Declarations (“Governing Documents”)

WHEREAS, the development of a strategic plan will help establish clear priorities, align resources with community goals, and ensure LWVA is prepared to meet future challenges and opportunities;

WHEREAS, the Board recognizes the importance of proactive, long-term planning to guide the growth, maintenance, and financial sustainability of LWVA;

WHEREAS, the Board has determined that it is in the best interests of LWVA to apply modern strategic planning, thought and practice to its decisions concerning the development and sustainment of the physical plant, facilities, security, financial resources and the needs of the members, residents and owners.

WHEREAS, the Board finds it beneficial to periodically form an ad-hoc Strategic Planning Group (“SPG”) to research, advise the Board, and recommend long-range strategies that reflect the needs and values of the community; and

NOW, THEREFORE, BE IT RESOLVED, that the Board hereby adopts the following policy, which shall supersede and replace any previously adopted policies and procedures relating to the same or similar subject:

I. PURPOSE

The purpose of this Resolution is to develop a strategic plan for LWVA, with input and assistance from Members, committees, and residents, including, but not limited to, future quality of life needs and infrastructure requirements, as well as needs identified in the Operating Reserve Study and in accordance with the goals noted below. The SPG will concentrate on developing financial and operational strategies to support LWVA’s continued position as a premier 55+ community of choice.

II. GENERAL CONSIDERATIONS

- A. The SPG is intended to function on an as-needed basis for purposes of developing or updating a strategic plan for LWVA. The Board generally anticipates that a comprehensive strategic planning review may occur approximately every five years, or at such other intervals as determined appropriate by the Board.
- B. The SPG shall recognize that strategic planning is inherently a group activity that benefits from the greatest possible involvement of its members and those on whose behalf the planning is conducted.
- C. The SPG shall encourage camaraderie, interaction, and understanding of differing viewpoints in all of its deliberations, reports, *Connector* articles and website pages.
- D. The SPG initially will consist of one owner or resident from each member condominium association and one owner or resident from The Vistas. Subsequently, the Board may appoint an at-large group leader and deputy group leader. No member of the SPG shall be a current Member Representative.
- E. The recommendations of the SPG shall, to the greatest extent possible, be based on a consensus of its members.
- F. The Board shall have final review and approval of any written plan submitted to the Board by the SPG.
- G. Unless otherwise directed by the Board, the SPG shall conclude its activities upon submission of its final recommendations and written strategic plan to the Board.

III. GOALS

- A. Promote Lansdowne Woods value as a vibrant active adult community, an attractive real estate choice, and a community that maintains strong infrastructure and appealing surroundings.
- B. Sustain or enhance the quality of life for residents.
- C. Increase resident and owner committee participation, service, and community involvement.

IV. TASKS

- A. Develop strategies, goals and objectives within our community – but, also, with the external community.
- B. Involve owners to the greatest extent possible in developing recommendations to the Board.
- C. Utilize externally developed sources of information, to the greatest extent possible, in developing recommendations to the Board. These sources shall include, but not be limited to:
 - 1. Demographic trends that will affect the interests and needs of our current residents as well as those of the next generation of new residents.
 - 2. Environmental forces and demographics that will affect our population, including social, economic, technological, legal, and political forces.
 - 3. Preferences about living arrangements held by our population.
 - 4. Challenges that will be facing similar homeowners' associations and their leaderships.
- D. Meet regularly in order to present monthly updates to the Board on progress, issues and items of strategic interest.
- E. Complete and submit to the Board a written plan.

**LANSDOWNE WOODS OF VIRGINIA
COMMUNITY ASSOCIATION, L.C.
(LWVA)**

2021 STRATEGIC PLAN

REPORT TO THE BOARD OF MEMBERS

November 3, 2021

Submitted by the LWVA 2021 Strategic Planning Group:

Brenda Brohard, Eileen Frumkin, Peggy King, Susan Stoddard and Dona Wolf

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Executive Summary

Lansdowne Woods of Virginia Community Association, L.C. (LWVA) is in its 23rd year of operation as a 55+ Active Adult Community. The Strategic Plan of 2016 did a wonderful job of addressing the changes and trends that have had an impact on our community since its inception. Changing lifestyles, seniors working longer and/or aging in place, plus the increasing number of new active adult and continuing care communities have given LWVA compelling reasons to stay current and compete for active adults as prospective residents.

The Strategic Planning Group of 2021 seeks to update the Plan of 2016 and address these trends to maintain LWVA as a vibrant community.

Framework for Developing the 2021 Strategic Plan

Our intent was to update and enhance the 2016 Strategic Plan. The Strategic Planning Group (SPG) noted what has been done and what still needs improvement, and we incorporated the results of the LWVA 2021 survey into a new and updated 2021 Strategic Plan.

Our research showed that today's active adults are still seeking activities and social interaction, the proximity of family and friends, and the availability of a variety of interest groups both within and outside the community. Our premier location in Loudoun County affords us access to many varied activities, cultural centers, cinemas, shopping, and medical or health facilities. Still high on most residents' lists are nature trails and a gated community.

Our 2021 LWVA survey showed that residents are health conscious, active physically and mentally, as well as more computer savvy. The explosion of technology has changed this age group's lifestyle.

The LWVA Community Survey of 2021 had a 52% response from residents -- similar to the response rate in 2015. The average age of survey respondents was 77 years, with 92% being resident owners. Because 95% of survey responses were submitted by computer, it is assumed that residents are more comfortable with computers and the internet than they were in 2015.

Most residents came to LWVA for the location and amenities. They stayed for the people and the sense of community. Many residents also indicated they moved to our community to be near family. Respondents indicated that they would only relocate for health reasons, more assistance with their daily care, or in some cases to be closer to family.

When asked if a shared community vision and values are important to them, most replied that they were "very important" or "somewhat important." The question was asked if our Vision has been fully realized - only 48% felt that it has. Most of the negative comments included the community restrictions during

the Covid pandemic, high and rising HOA fees, lack of good financial oversight, mismanagement of the clubhouse renovations, and a perceived lack of transparency overall.

Most responded that since mid-2020 LWVA has been heading in the right direction with positive comments about the new management. Respondents are happy with Zoom technology and the access it has given them to attend board and other community meetings.

Activities at LWVA were mentioned as the most important way to promote our community as a 55+ active adult community. Outdoor physically active and socially interactive amenities appeal to all ages. The pool, gym, roof top courts, and walking trails are very popular. New activities suggested include: trips away from campus (day and overnight), a putting green/bocce/croquet, a dog park, cultural events, and community meditation opportunities. The LWVA bus, and its existing schedule, is very important for our residents.

Technology has become more and more important to residents. Suggestions were also made to improve security, speed up the internet, and install electric vehicle charging stations.

One recurring subject throughout the survey is that since LWVA promotes itself as being a 55 + active adult community, many would like that to be accurate. With an age range of 50 to 104, this is a very sensitive issue, one that we should all be aware of as we consider how we can best meet the needs of everyone. We should strive to offer a variety of activities that appeal to residents of all ages.

As members of this new Strategic Planning Group, our aim was to develop strategies that promote our community values and culture while being mindful of the needs of our current residents. The SPG supports and has updated the framework originated in 2016 to preserve, improve, and promote LWVA as follows:

Preserve:

- Govern ethically
- Maintain the buildings and grounds
- Provide safety and security
- Maintain amenities valued by residents
- Manage our finances

Improve:

- Enhance the physical appearance of buildings and grounds
- Encourage more resident participation and interaction
- Support learning opportunities for all residents
- Use technology innovatively
- Make the physical plant more energy efficient
- Introduce and adapt amenities for current and prospective residents

Promote:

- Communicate accurately what our community does and does NOT offer
- Market LWVA to prospective residents
- Continually improve communication within LWVA and the condominium associations

The Strategic Plan of 2021 is a living document that will be reviewed and revised over the next five years to ensure that the community is meeting the expectations of current and future residents. The plan should be the foundation of a process of continuous improvement, future planning, and a vehicle for facilitating community consensus. Our Core Values, Vision Statement, and Mission Statement follow.

Core Values

We, the residents of Lansdowne Woods of Virginia, believe we can best fulfill our vision and accomplish our mission through the following core values:

- Active Lifestyle – Provide a vibrant community that promotes an independent active adult life style that is inclusive and diverse
- Resident Involvement – Promote resident participation in community activities, organizations, volunteer programs, technology, and governance
- Ethics – Demonstrate high ethical standards and courteous behavior
- Fiscal Responsibility – Maintain sound fiscal management to protect and preserve LWVA's assets and property values
- Continuous Improvement – Maintain and enhance the property infrastructure, amenities, facilities, grounds, and landscaping to ensure an aesthetically pleasing community that is easily accessible to all and has a 24-hour gated entry
- Support – Supply the necessary resources, tools, equipment, and training for governance volunteers and employees to succeed in accomplishing their individual goals and objectives in support of LWVA

Vision Statement

We envision a financially sound, premier, participative and diverse community that meets the ever-changing expectations of current and future residents. We seek a high quality, vibrant and fulfilling active lifestyle in a dynamic, forward thinking, supportive, and secure environment that is managed by strong owner governance.

Mission Statement

As a 55+ active adult community, the mission of Lansdowne Woods of Virginia is to offer programs and provide effective governance by:

- Providing a community that promotes an inclusive and diverse active adult lifestyle
- Achieving a higher level of resident satisfaction with facilities
- Providing support for a broad range of amenities and social activities to suit a variety of interests and age groups
- Promoting resident participation in community activities, organizations, volunteer programs, technology, and governance
- Maintaining sound fiscal management to protect and preserve LWVA's assets and property values
- Maintaining and enhancing the property infrastructure, facilities, grounds and landscaping to ensure that LWVA is aesthetically pleasing
- Acknowledging that LWVA employees and the owner governance team are the cornerstone of LWVA who share a common purpose and commitment to the highest professional standards of excellence

Recommendations – Continuing Our Path to the Future

The Strategic Planning Group of 2021 recommends the following goals:

1. Promote the Value of LWVA as a 55 + active adult community
2. Sustain and enhance the quality of life for residents
3. Increase resident participation on committees and in community involvement

These goals apply to the six condominium associations as well as LWVA, requiring cooperation and coordination to be effective.

GOAL #1: TO PROMOTE THE VALUE OF LWVA AS A 55+ ACTIVE ADULT COMMUNITY

The SPG recommends that the LWVA Board of Members convene a new Strategic Planning Working Group every five years to review the current Strategic Plan and to make changes and additions as appropriate.

Community Relations & Marketing Team

The SPG recommends establishing a Community Relations & Marketing Team to promote our lifestyle, values, and resident contributions - both inside and outside of our community. This team would also advocate on behalf of our community with potential residents and real estate professionals communicating the values and culture of LWVA.

Recommended tasks could include, but would not be limited to:

- Developing contacts with County, social and legislative agencies to advocate on behalf of the needs of our community
- Developing contacts with local media outlets and newspapers
- Revitalizing a New Resident Welcome Program
- Suggesting/Encouraging new residents to volunteer
- Writing job descriptions defining the type of work, responsibilities, and duration of volunteer opportunities
- Promoting volunteer opportunities via all LWVA media channels
- Continuing a program to recognize our volunteers
- Writing and distributing articles and photos about current activities, volunteerism, special events in the community to media outlets and newspapers, and the LWVA Communications Committee
- Engaging with neighboring communities and organizations
- Developing a communication plan for LWVA that ensures that the community remains visible and desirable in the active adult marketplace
- Continually updating the LWVA “visitor” (external) website so it has a more modern dynamic look, featuring videos and links
- Coordinating the posting of information on the LWVA official social media platforms
- Continually updating a library of professional community photos, videos, and narrative language for real estate agents and LWVA
- Continually updating community brochure and social media platforms
- Maintaining competitive analysis information about other 55+ communities in the area
- Maintaining a breakdown of Condo and HOA costs showing what is/is not covered
- Applying for various special recognition awards such as Communicator of the Year, Humanitarian of the Year, 55places.com, etc.

Making LWVA Technology Focused

While today's active adults are computer savvy and use technology daily, there is still a number of residents not completely comfortable with computers. The current Technology Working Group explores and makes recommendations for the implementation of new technologies that will benefit the community in terms of enhancing services to residents.

Additional recommendations could include:

- Improving LWVA meeting availability to residents through internet-based (website) access
- Continually assessing new communication technologies that can be deployed in the community
- Updating LWVA security systems at the gatehouse and association buildings, which could include an automatic gate for residents
- Assessing feasibility of utilizing renewable energy technologies for appropriate use in buildings, such as solar panels and solar windows
- Conducting periodic review of energy assessment of the clubhouse and buildings
- Obtaining energy efficiency and 'green' certification for LWVA association buildings
- Developing plans to transition to a 'green' community to include:
 - Assessing cost savings opportunities such as reducing water and electricity consumption
 - Assessing energy and power innovations, and building material innovations
 - Transitioning to more energy efficient transportation
 - Accommodating alternative energy automobiles, including charging stations
- Continually training volunteers to manage audio/visual equipment
- Continually providing computer assistance and training for residents

GOAL #2: TO SUSTAIN AND ENHANCE THE QUALITY OF LIFE FOR RESIDENTS

Updating Clubhouse/Adding a Welcome & Resource Center

- Our entry gate and LWVA Clubhouse are the first introductions to our community for every guest, including potential residents. The Clubhouse should reflect our upscale community and make visitors feel welcome and informed. Clubhouse decor should be continually refreshed to project an updated image of the community.
- A Welcome & Resource Center should be established for residents, visitors, and potential purchasers with information about what our community offers. A package of materials with contacts for general resources may be developed for resident and family use.
- A coffee bar/Wi-Fi zone could be created to increase residents' ability to socialize and enjoy the clubhouse.
- Video monitors in Clubhouse and building lobbies showing ongoing activities, videos, photos of the communities, special events should continue to be provided
- The exterior use of the Clubhouse could be expanded by adding a covered porch area adjacent to the restaurant.
- Continual reevaluation of how Clubhouse space may be re-purposed would lead to decisions that better suit the community's needs.

Improving Landscape Appearance

Lansdowne Woods of Virginia is located in a premier location in the midst of extraordinary natural beauty. Our community should strive to enhance the exterior areas taking full advantage of these two features. Landscaping provides an aesthetically pleasing environment, improves quality of life for residents, establishes curb appeal for visitors, and enhances property values. The community needs a long-term plan to continuously improve our landscaping to a level beyond what the developer established years ago.

The SPG recommends the Board continue to monitor and review the current landscape plan to refresh the community grounds, making sure to include native, non-invasive species in an effort to be environmentally friendly. Additionally, we recommend:

- Adding quality planters and seating which encourages group conversations
- Adding an arbor type patio cover to each building's patio area
- Designing habitat enhancement spots for birds, bees, butterflies etc.
- Planting native, non-invasive species for cost savings and water conservation
- Developing relationships with volunteer groups, such as Eagle Scouts, for trail clean up

Wellness Strategies

It is important to acknowledge that activity and wellness strategies go a long way to maintain health in senior years and should be a focus of our community. Survey responses have indicated that some residents are deciding to age in place in their homes. The proposed Welcome & Resource Center would provide information for people for this process, including what LWVA offers and what we do *not* offer to potential residents.

The SPG recommends that LWVA host biannual Health and Wellness Fairs. We also recommend exploring making LWVA's building be smoke-free (grandfathering existing residents).

GOAL #3: TO INCREASE RESIDENT COMMITTEE PARTICIPATION, SERVICE AND COMMUNITY INVOLVEMENT

Community Involvement and Volunteers

Here at Lansdowne Woods, our community governance continues to function well due to the efforts of resident volunteers. Our volunteers are essential a key focus of our community, particularly since it is well known that remaining socially engaged is vital to a healthy life.

Volunteers make the Lansdowne Woods Board of Members and the condominium associations of each building work. Without volunteers as Board and committee members, we would have to consider the financial impact of hiring additional staff to do their work.

The Strategic Planning Group recommends that the aforementioned Community Relations/Marketing Team be enlisted to encourage new and existing residents to pursue volunteer activities both within and outside the LWVA community.

Joint LWVA/Condominium Association Common Interest Meetings

The SPG encourages good communication between LWVA building staff and committee chairs throughout the LWVA community. We suggest that they continue to review possibilities to coordinate contracts, and consolidate the procurement of goods and services across the LWVA community.

Looking to the Future

We strongly recommend a Welcome and Resource Center to help prospective and current residents make informed decisions about their lives here at Lansdowne Woods. The Center could have videos and provide information about the 55+ active adult community we enjoy.

A newly developed Community Relations & Marketing Team would promote our lifestyle, values, and resident contributions, both inside and outside of Lansdowne Woods. Currently, each building has information available for residents regarding numerous resources and different vendors. We believe that it would benefit the community as a whole to have those resources consolidated in one central place – our newly established Welcome and Resource Center.

The current landscaping firm has spruced up the grounds, and the Clubhouse renovations are near completion. We recommend continued refreshing and upgrading of the buildings and grounds to include new seating areas for social interaction, a dog park for residents, and other new activities for residents of all ages to enjoy.

Staying on top of advances in technology and using that technology wisely will make everything we do at LWVA work better and more efficiently. We are also suggesting electric car charging stations, and perhaps a semi-automatic front gate entry. New technologies improve our community, our homes, and can lower association utility costs by allowing us to become more energy-efficient in our use of water, gas, and electricity.

We recommend increased communications between LWVA staff, committee members, and residents with the expressed goal of increasing our volunteer pool.

Once the LWVA Board of Members has accepted and approved the recommendations herein, a success indicator matrix could be developed at some point to measure the success of our recommendations.

In summary, we anticipate that this updated Strategic Plan will provide a road map for future discussions for the Board of Members and for the LWVA community as a whole.

We thank those residents who responded to the 2021 LWVA Community Survey. Their responses provided valuable guidance and the foundation for our work on the Strategic Plan of 2021.