Oakmont Village Association
Policy & Procedure for Directory Residential Listings

Values & Assumptions

- Oakmonters value and use the directory; they want their listing to be accurate and they want as much freedom of choice as possible in how they are listed.
- Oakmonters expect limited distribution and accordingly are more willing to be listed than in countywide directories.
- OVA and its agents need to be efficient in maintaining and changing the database. Maintaining only one database (which is used primarily for accounting purposes) promotes accuracy and is efficient but limits flexibility of format.
- Income from the directory publisher is an important but secondary consideration.

General Policy

- No one is to be listed unless they ask to be.
- OAS Management will maintain the OVA's membership database, including the directory portion.
- OVA will be primarily responsible for editing the directory portion of the database.
- No changes will be made to the directory database unless documented by a written request.
- Eligible persons for listing are residents, non-resident owners (to the extent supported by the database), and deceased spouses (subject to format restrictions). Eligible persons must allow either their address or phone number (or both) to be listed in order to be included in the directory.
- Listing formats that do not interfere with the billing process will be used.
- Oakmonters should be given at least a month's prior notice of their input deadline for inclusion in the next directory.

Specific Policy

- Listings shall be solicited all year long and entered in the sole data base maintained by OAS on a timely basis. The database should not be changed without a supporting, dated data sheet. Staff from either OAS or OVA may prepare data sheets for residents based on phone calls.

- Eligible persons must make an initial request to be listed. Once they are listed, they must submit a change request to delete[1] the entire listing or modify[2] it. Sheets requesting modifications will be presumed to change only the indicated data; normally, data not mentioned will be left unchanged. See the next paragraph for moves within Oakmont.

- Persons moving within Oakmont will have to request again to be in the directory just as if they were first time residents. This applies to both owners and renters and is necessary because of loss of information when the move out is recorded.

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[1] Exception: entire listings will be automatically deleted when the resident moves within or out of Oakmont.
[2] Death will result in automatic changes described in the Deaths section of this policy.

- The following persons are eligible for listing: residents (owners and renters), non-resident owners if they have a phone with the same area code as Oakmont, and deceased spouses (under strict rules described in the Deaths section below).

- The following variations in listing are allowed beyond the normal ones of one or two persons with the same last name:
  - Nicknames in addition to, or instead of, given name; initials; titles; ranks; degrees; etc.; subject to space limits per individual;
  - Separate listings for each resident in a household, if last names are different; as many different phones can be listed as there are separate listings (or the same phone for all);
  - One listing (by the specified last name) for two persons with different last names; only one phone number listed;
  - Multiple alphabetic listings with all names in the household (subject to space limitations) in each listing; as many different phone numbers are possible as there are listings, one per listing; some names may have to be in parentheses to avoid billing confusion;
  - Name and phone number without address, and
  - Name and address without phone number.
  - Further, origin is optional.

- The following listings are not permitted:
  - Name only;
  - Non-resident owner with out-of-area phone;
  - Temporary residents, even if repetitive;
  - Prospective owners whose escrows have not closed or tenants who have not moved in; or
  - Anyone if all persons in the listing no longer own or reside in Oakmont.

- Deaths: Because the names eligible for listing are used by OAS to bill dues, deceased persons must be either omitted or listed in a uniformly distinctive way so as to be disregarded for dues purposes. When learning of a death, OAS will automatically change the listing as follows:
  - Decedent is only resident or has different last name: omitted.
  - Surviving wife: Wife's name will be listed along with parenthetical husband, e.g., Jones, Mary (Mrs. John). The surviving wife's options are to accept that listing[3] (or certain variations of it) or have the reference to the husband deleted.
  - Surviving husband: Husband's name only will be listed, e.g., Jones, John. The surviving husband's options are to accept that deletion or add the wife's name[4] in parentheses, e.g., Jones, John (Mary).

- Supplemental Directories. Normally, the OVA Office will not prepare supplemental directories between publication of regular directories. Exceptions are at the discretion of the Manager or the OVA Board.

- Distribution

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[3] There is flexibility for husband's first name, initial, nickname, title, etc.
[4] There is flexibility for wife's first name, initials, etc.

- One to a household with extra copies to the OVA Office.
- Delivered to doorstep and rain protected.
- Up to one copy for each installed phone to each local business.
- Advertisers get directory with residential section omitted.

Approved by Board of Directors: March 21, 2000

Note: The Board did not rule on the following procedures on the theory that they are within the purview of the Manager.

Procedure

- During the year, data sheets are routed to OAS for data entry. (OAS obtains many initial data sheets along with information from new sales. Both OVA and OAS receive forms directly from existing residents.) OAS retains a copy and routes the original to OVA.

- OAS also deletes entries during the year based on deaths and moves (as part of maintaining the billing portion of the database).

- By October 15, decide date for transmitting the edited directory list to publisher. Also, decide on a cutoff date to occur on or before 12/1 (due to workload considerations after January 1).

- Inform residents twice via Oakmont News of last date for them to submit information for the directory. E.g., if the cutoff date chosen is 12/1, notices must go in 11/1 and 11/15 issues.

- OAS prints two copies of the "Membership Telephone List" (MTL) effective about one month before cutoff and gives them to OVA. E.g., if the cutoff date is 12/1, the list gets printed as of 11/1 and includes all data sheets submitted to that date. OAS ensures that all sheets processed by them have been returned to OVA at this time. (The duplicate copy of the MTL is needed so residents may check their listing in the OVA Office while OVA staff is editing the other copy. The MTL lists only those persons who, according to OAS records, have asked to be included in the directory.)

- OAS also prints a "Membership Listing by Street" (MLS) for OVA. (The MLS shows all current owners and residents in OAS's database.)

- OVA's data sheets are put in strict alphabetically order at this time. (However, doing so monthly during the year is recommended to facilitate answering member questions during the year.) Multiple sheets for the same party are stapled together in reverse chronological order, i.e., the top sheet is the latest.

- OVA compares the directory in use with the MTL for omitted listings on the MTL and determines why. Most omissions can be answered by a review of the data sheets. OAS should be asked to explain the remainder, which will usually be deaths and moves. If any are unexplained, and if the MLS shows they are still here, a data sheet should be prepared and processed to re-enter the missing resident. (In OAS's database, all persons are included in the billing portion. A simple yes/no field determines that person's inclusion in the directory.)

- The data sheets should be closely analyzed for any requests not to list addresses and identified (color tabbed for easy identification). Since not listing an address can only be done manually by OVA at the very end of the process, the following must be done at this time:
  - ✓ The list of address omissions from last year must be updated to include all new requests. The list must also be analyzed for persons no longer here and for anyone on the list who has changed their mind and requested an address listing.

This list is in the manager's computer under the file name and path printed on the bottom of the list.

- The first MTL is analyzed by one OVA person (for consistency) for the following:
  - ✓ Punctuation consistent with directory format. E.g. no periods; commas between city and state; state abbreviations only when listed with city; quotes for nicknames (when present with given name); parentheses for titles; etc. (The final submission to the publisher will be by computer disc so this is why we get punctuation right.)
  - ✓ Verification of data sheets with listing. For variations, the data sheet should be pulled for re-submittal. Mark the MTL accordingly. (E. g., a symbol for okay and another for re-submitted.) Except for punctuation, notations on the MTL are not to be the source of data input. Phone calls to residents to clarify intent are encouraged at this point.

- Data sheets should continue to be submitted to OAS frequently at this stage. When sheets submitted after the first MTL are returned, batching is critical. Keep processed sheets alphabetical but separate from those included in the first batch.

- Send a letter soliciting data sheets to all owners and residents who do not have phone numbers in the database. The source for this is the "Membership Listing by Street" (MLS). OAS should have printed it for OVA for this purpose about the same time as the first MTL. The letter will be going to people who have inadvertently not told us their phone number as well as to people who don't want us to know. The letter must be worded not to upset the latter.

- The section of Community Pages must also be reviewed and updated as needed. This is a parallel process to the residential pages and should be well under way by this point. Groups like LOMAA and OGC should be asked to provide their updates. The process for obtaining and selecting the cover photo should also started at this time.

- After the cutoff for further resident input, all unprocessed remaining sheets should be expedited to OAS and back. A second MTL should be prepared. (No new data sheets should be processed after the second MTL unless both OAS and OVA are in sync. This also applies to the directory portion of records developed because of escrow closings.) This second MTL should be analyzed similarly to the first MTL from the batch kept separate in anticipation of the second MTL. (If there are more than two MTLs, then each should be analyzed at this step with respect to its own batch.) Be sure to update the "Address Omit" list at this time.

- It is recommended and assumed that one person has done all the verification of MTLs vs. data sheets up to now. Based on the first person's review of the second MTL, data sheets for re-processing are pulled and set aside.
  - ✓ It is now time to introduce the second set of eyes.
  - ✓ All batches of data sheets are merged into one file, except the batch just pulled for reprocessing.
  - ✓ The second person then checks first for punctuation and then does a sheet-by-line comparison on this second MTL with due regard to the probably small batch of data sheets just pulled by the first person.

✓ Additional data sheets are pulled as needed for reprocessing by the second person. Phone calls to determine intent are desirable if time permits.
✓ This second person should also be looking for unflagged requests to omit addresses from the directory.

- The second MTL, marked for punctuation, and data sheets that need reprocessing are resubmitted to OAS.

- OAS prints a third MTL and returns it to OVA with the reprocessed data sheets. Both sets of eyes verify the new list that punctuation was corrected (based on markings on the prior MTL which has been returned) and against the relatively small batch of data sheets pertaining to this MTL. Both sets of eyes continue to be sensitive to any address omits in the batch of reprocessed sheets (for the MTL will not indicate it). If necessary, reprocessing is done with another similar final check of the new MTL that the expected corrections were successful.

- OVA then deems the list to be correct and asks OAS for a final version in duplicate. Also, the file is to be produced on disc (Notepad or Wordpad compatible). The data sheets can now be inter-filed so there is only one master set.

- OVA manually marks the paper MTL for omission of addresses at this time using the final Address Omit list. Normally, the disc file will not be edited for address omissions (and therefore the publisher will do that). The second person then double-checks the deletions. Corrections to address deletions are made as needed. (Not hard to do; the list is about one page long.) A copy of the disc is made, probably to the hard drive of the manager's computer.

- The Community Pages and photo should be finalized by now.

- The two versions of the final MTL (paper and disc) as well as the cover photo and Community Pages are submitted to the publisher, probably by 1/15. (One copy of the final MTL – paper and disc are kept by OVA.)

- Determine whether the publisher can provide a proof in time for residents (1) to be informed via Oakmont News and (2) to have at least a week to stop by the office to check their listing.

- In any event, the publisher's proof needs to be checked by both sets of eyes. Both the last MTL and the Address Omit list are to be used for this purpose.

- Timely advise the publisher of any changes.