



Otter Point Recreational Cooperative Association

Cornerstone Properties 301-1001 Cloverdale Ave, Victoria, BC V8X 4C9

New Member Interview Checklist

Date: _____

Lot #: _____

New Member Name(s): _____

Joint Tenant(s) Name(s): _____

Board Member Interviewer Names: _____

OVERVIEW/PROCESS

In accordance with the 'Rules', 'Member (Section 2), b)' of the Otter Point Recreational Cooperative Association, the directors (at least two) may approve, refuse or postpone an application for membership in the association.

Three copies of the 'Application For Membership' (signed by two directors and purchasers/joint members) form are required: One copy for the Association's files, one copy for the buyer/joint member and one copy for the new/joint member(s) to take to the lawyer's office.

A copy of this form should be filed in the file associated with the lot number being discussed.

PURPOSE OF INTERVIEW

The purpose of the interview is to insure potential new members are aware of and fully understand:

- The nature of and the implications of a membership in a Cooperative Association.
- The 'Rules' and 'Internal Regulations' of the co-op (and the implications of non-compliance).

PRIOR TO INTERVIEW

- Ensure the prospective member(s) have a copy of both the 'Rules' and 'Internal Regulations'.
 - If not, email them immediately as they need to be read **prior to** the interview as they will be confirming that they have 'read and understand' them.
- Check with the secretary and lot file in the library to ensure there are no infractions and/or any outstanding fines/assessments that need to be cleared up **before the sale can be finalized**.

Member(s) initials:

DURING THE INTERVIEW

- Explain and discuss the points below.
 - Check off each point as discussed and have the prospective members **initial/sign each page**.
 - Have the prospective members sign the last page of the document.
 - Submit the checklist and a copy of the 'Application For Membership' to the Secretary for filing.
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INTERVIEW

- Introductions and welcome.
 - Interview format – Go through key information, have a discussion and complete/sign/initial checklist and 'Application For Membership'.
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GENERAL OVERVIEW

- There are 108 member lots plus one mobile home for the caretaker plus, washrooms, laundry, tent area, library, toolshed, ramp and dock, and land line phone for emergencies.
- Members purchase 'shares' in the cooperative (they don't own the property itself).
- All members contribute to the costs of running the park based on the number of shares they hold (except for lot electrical usage, member fines and lot maintenance charged back to member(s)).
- The park is managed by a Property Manager (PM) via Cornerstone Property Management (CPM) and a board of Directors (with input from members).
- Common property upkeep (roads, buildings, tent, gate, electrical sheds, fences, wharf, trees, etc.) is managed by the Board with input and help from members.
- Residency in the park is limited by the Capital Regional District and cannot be full time.
- Owners are expected to participate in the maintenance and upkeep of the park and participate in work parties, serve on the Board or other committees and attend the AGM each year.
- Please follow all rules regarding garbage and recycling. We have far stricter rules than other places in Canada and the US and can be fined if we don't do this properly.
- Pets must always be leashed and must always be picked up after.
- Dogs' excessive barking on common property, member lots or in RV's is not allowed.
- An easement exists with the mobile home park next door that allows its residents access to 1) the road from the gate (by the tent) to the front gate of the park and 2) the road from the park's front gate along the road (lots 1 – 19) to the top of the boat ramp.
- Please join happy hour groups, social get togethers, etc.!

Member(s) initials:

'RULES' AND 'INTERNAL REGULATIONS'

- The Provincial 'Cooperative Association Act' and 'Cooperative Association Regulations' govern the operation of a Cooperative Association. As such, our 'Rules' and 'Internal Regulations' have been written to reflect the contents of them.
- All members share the responsibility to ensure that the 'Rules' and 'Internal Regulations' are followed.
 - Do you have copy of both the 'Internal Regulations' and 'Rules'?
 - If no, ensure a copy of each is emailed immediately. The checklist and 'Application For Membership' cannot be signed until these have been read and agreed to.
 - Have you read and, do you understand the 'Rules' and 'Internal Regulations'?
 - Do you have any questions about anything in either document?
 - Do you agree to abide by both the 'Rules' and 'Internal Regulations' of the park?
 - Do you agree to notify the PM and/or Directors when/if you notice contraventions of rules by members or their guests?

SHARES/JOINT TENANCY

- You are purchasing 'shares' in the cooperative as a whole and not a 'plot' of land.
- Shares are assigned to each 'lot' (not all lots have the same share value).
- The minimum number of shares that can be purchased is 90 and the maximum is 500.
- If two or more people/businesses are purchasing a lot, they are considered 'Joint Tenants' and hold one membership in the Association for that lot.
- Only one vote per lot is allowed. If the lot is held in 'Joint Tenancy', any one of the members in that joint tenancy can sign into a meeting and receive a voting card for that lot.
- A \$100 administration fee is assessed to cover any expenses incurred when shares for lots are transferred. This amount should be submitted to the lawyer at time of purchase.
 - Do you understand the share structure of the Association?
 - Were you given the original 'Share Certificate' for the lot?
 - If so, ask the member to ensure they take this to the lawyer with them.
 - If not, ask them to check with the seller to get it. If they don't have it, the Association's lawyer may already have it on file.
 - Will you be purchasing the lot with anyone else (joint tenancy)?
 - If so, note that this will be written into the 'Application For Membership' form.
 - Do you have any questions about the share structure or joint tenancy?

Member(s) initials:

Residency Limitations/Rentals/Business

- The OPRCA is zoned as ‘Intermittent Rural Residential 4 zone’ as per the Capital Regional District and as such, occupation of the individual lot is limited to six months (183 days) of a calendar year.
- No person/guest/renter) can stay in the park for more than six months (i.e. a person cannot reside on one or more lots for six months then move to another lot for any amount of time).
- Rentals are allowed for friends and family known to the member. Members are not allowed to advertise their lot for rent using any electronic means in any way. The vision of the park is for it to be used by members, their family, friends and occasionally others with whom the member has made a personal one on one agreement with.
- A ‘Visitor Information Form’ (VIF) must be submitted for all guests staying on your lot when you are not there. This is required for security purposes (for the caretaker) and to ensure that lot use limitations are not exceeded. The VIF must be submitted prior to the guests coming to the park.
- No business can be run out of the park.
 - Do you have any questions about the residency limitations, rentals or running a business?
 - Do you agree to abide by these limitations for yourself(s) and any guests/renters who may make use of your lot?

Financials/Assessments

- The administration of finances for the park is completed by CPM.
- The park’s ‘Treasurer’ works with the Property Manager and the board to manage finances.
- A budget is drafted annually (May 1st to April 30th) for approval by members at the next AGM. The budget outlines the shared costs (and liabilities) of the Association for items such as taxes, shared hydro, water, caretaker, internet, maintenance, upkeep and administration, etc.
- Individual member ‘Assessments’ are calculated for each member lot. They are sent out (usually in late May/early June of each year) with the AGM package.
- The seller and purchaser must work out and agree upon how the annual assessment is apportioned (i.e. what portion of the assessment each will pay based on the purchase date).
- Member ‘Assessments’ must be paid by June 30. If not, a fine of \$250 is applied and compound interest of 2% will be charged in addition to the fine.
- If any fines or liens have been levied against the lot, they must be paid prior to a member being able to vote at a meeting.
- Overall operating expenses are shared by all members equally.
- Property tax amounts are calculated based on the number of shares assigned to the lot.
- The only item on the ‘Assessment’ that is not a shared cost is the individual member lot electrical usage (there is a separate meter for each lot in one of four electrical sheds on site). The usage of electricity for each lot is calculated and noted at the top of the ‘Assessment’.
 - Use the ‘Annual Assessment’ card to go through and explain the electrical calculations and the layout of the ‘Assessment’.
 - Do you understand the nature and operation of the co-op and the associated costs, liabilities and its administration (i.e. shared roads/common property, expenses, etc.)?
 - Do you understand that assessments and/or fines/liens are to be paid by June 30?
 - Do you have any questions about the financials and/or assessments for the park?

Member(s) initials:

Member Lots

- Any ‘grandfathered’ or ‘non-confirming’ clauses attached to the lot being purchased must be rectified prior to or as soon as possible after the purchase.
 - Note here if there is any ‘grandfathering’ or ‘non-conforming’ on the lot.
 - Members are responsible for the upkeep and maintenance of any recreational vehicle, vehicle and/or structure (shed) on their property. Fines may be assessed if this is not done.
 - Noise restrictions are between 10 pm and 8 am (no audible noises to neighbour sites, back up alarms deactivated, no boat motors started).
 - There is a cap on construction of any kind that is enforced by the Capital Regional District. No new roofs or sunrooms can be constructed anywhere in the park.
 - No construction or alteration of/on lots and/or RV’s (i.e. roof repairs, steps, landings, sheds, sunroom/deck repairs, RV changes, etc.) is allowed unless and until a written request with detailed scale plans has been submitted to the PM/Directors and has been signed off as ‘approved’ by the Directors (a minimum of two weeks is required for approval).
 - No tents are allowed on lots.
 - Canopies must be taken down when the member is not going to be on the lot as high winds can carry them away.
 - Members must not hinder access to common property/infrastructure (septic, water, hydro, etc.).
 - Members are not to make any changes to common property surrounding lots in the park.
 - Please monitor water usage/leaks and ensure disposal into drains to the septic tanks do not include chemicals, harsh materials or bulky items.
 - All water must be turned off when the member is not on site.
- Do you have any questions about the lot, maintenance, constructions, etc.?
- Do you agree to abide by all the restrictions and limitations listed above?

Recreational Vehicles/Boats

- The recreational vehicle on the lot must always be properly insured and any vehicle(s), boat and trailer must be properly licensed and registered as per the ‘Motor Vehicle Act’. Please speak to your insurance agent to ensure you have proper coverage for all of these.
 - Recreation vehicle lengths are limited to what will fit onto a lot allowing one foot at the back lot line, one foot on the side lot line and six feet on the front lot line.
 - All new recreational vehicles must be approved by the directors. A scale drawing of the lot with all measurements of the lot and the RV must be submitted to the PM/Directors. A minimum of two weeks is required for approval.
 - Ask whether a new RV will be coming onto the site.
 - Boats are limited to 21 feet in length.
 - Ask whether a boat will be coming onto the site.
- Do you have any questions about RV’s/boats?
- Do you agree to ensure that all vehicles/boats/RV will always be properly insured?

Member(s) initials:

Confirm Finalized Sale

- Once the sale is finalized, please email: 7899otter@gmail.com to let us know and we will email you a 'Welcome Letter' to provide you with more details on the park.
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Agreement/Signatures

By signing below, I/we agree to abide by all the 'Rules' and 'Internal Regulations' of the Otter Point Recreational Cooperative Association – as discussed above and as written in formal documentation.

DATE: _____

Signature 1: _____ Print name: _____

Signature 2: _____ Print name: _____

Application For Membership

The transfer of shares **will not be** processed until an original copy of the 'Application For Membership' document is taken to OPRCA lawyer at:

Peter W. Demeo – Mullin Demeo Law Corporation – Barrister Solicitor

1626 Garnet Road Victoria BC V8P 3C8

Email: Peter@mdlawcorp.com

Phone: 250 477 3327 Fax: 250 477 0980

Toll Free: 1 877 477 3327

The purchaser is required to pay the lawyer.