



# The Oaks at Beach Lake HOA Meeting

October 17th, 2023 - Brighton Township Hall

# Tonight's Agenda

01

## Introduction

Learn about the HOA  
Board of Directors

02

## Board Positions

2024 & 2025  
Three elected positions

03

## Financial Update

Learn about the  
finances for the HOA

04

## 2023 Projects

Projects that were  
completed in 2023

05

## 2024 Projects

Discussion of  
beautification for 2024

06

## Get Involved

Volunteer opportunity  
and HOA input

# 01

# Introduction

Welcome to the HOA Meeting



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# Your Current HOA Board of Directors

**President:** Amy Rouech - 12397 Forest Oaks Lane

**Treasurer:** Joe Veach - 3126 Beach Lake Drive East

**Secretary:** Ellen Chaves Fenton - 3131 Beach Lake Drive West

**Maintenance:** Bill Carnevale - 3243 Beach Lake Drive West

**Director:** Melissa Bray - 3179 Beach Lake Drive East

**Webmaster:** Rich Giesige - 3149 Beach Lake Drive East

# 02

# Board Positions

2024 & 2025 2-year Term



# Board Positions: Election

**Treasurer:** They are the financial manager for the association. He or she is responsible for the association funds and maintaining all financial records. From billing and collections to disbursement of funds, the treasurer oversees all things financial.

**Secretary:** The custodian for most of association's official documents. They work closely with the president to develop the meeting agenda. During the meeting they will take the minutes for an official record. They may also serve as witness to official documents that need signatures.

**Maintenance Director:** They complete annual vendor review for outdoor services that help keep the common areas beautiful. They may have to help complete small tasks and work that is needed for the common areas. They also need to know what preventive maintenance is needed to keep all structures and equipment fully functional.

# How to add your name to the ballot?

If you are in-person, use one of the slips in the back of the room. Enjoy a cup of cider  and a cookie  too!

**If you are remote, you can use the post on the website or the facebook page that will be available on Wednesday at 8am. Voting ends Saturday, October 21st by noon.**

# 03

# Financial Update

The current finances for the HOA



# Payment of Dues

## Paid in Full

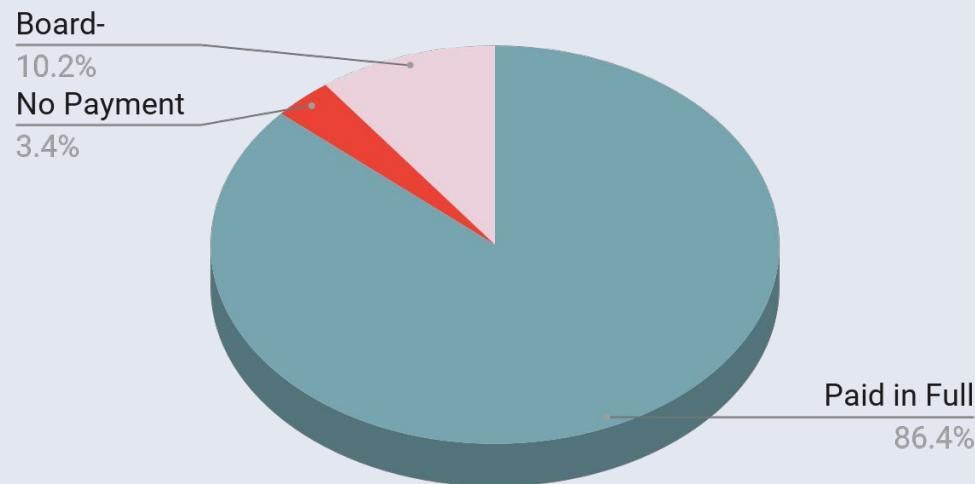
People that have paid their dues and have no outstanding balance

## No Payment

People we are still waiting on payment

## Board-Exempt

People who have given their time and work to the HOA.



# Expense Budget

|           | 2023 Budget | Year to Date | Budget to Actual |
|-----------|-------------|--------------|------------------|
| Lawns     | 9,328.25    | 9,142.75     | 185.50           |
| Entrances | 32,497.20   | 32,497.20    | 0                |
| Reserve   | 23,787      | 21,002.39    | 2784.61          |
| Trails    | 4,275.00    | 0            | 4,275.00         |
| Misc      | 2,840.00    | 0            | 2,840.00         |
| Admin     | 3,254.00    | 2565.84      | 686.16           |
| Total     | 62,981.45   | 52,208.18    | 10,773.27        |

# Receivables

| YTD Activity      |             |
|-------------------|-------------|
| Beginning Balance | 53,022.27   |
| Dues Received     | 48,248.63   |
| Cash Available    | 101,271.30  |
| Expenses          | (52,208.18) |
| End Balance       | 48,063.12   |

# Detailed Summary

## 2023 OABL Expense and Bank Account Summary

|  |   | 2023 EXPENSE BUDGET  | Year-to-Date Actuals | Budget to Actual      |
|--|---|----------------------|----------------------|-----------------------|
| <u>Maintenance</u>                       |   |                      |                      |                       |
| <u>Lawns</u>                             |   |                      |                      |                       |
| Mowing                                   | Against the Elements                                | \$ 8,228.25          | \$ 8,228.25          | \$ -                  |
| Sprinklers                               | R&J Lawn Sprinklers                                 | \$ 1,100.00          | \$ 914.50            | \$ 185.50             |
| <u>Entrances</u>                         |   |                      |                      |                       |
| Entrance Caps and Walls                  | Multiple Construction Services                      | \$ -                 | \$ -                 | \$ -                  |
| Street Sign Letters                      | Big Bore Sign LLC                                   | \$ -                 | \$ -                 | \$ -                  |
| Electrical                               | Oak Electric/Raymond Desteiger                      | \$ -                 | \$ -                 | \$ -                  |
| Flowers/Cleanup/Mulch                    | Just Gardens  | \$ 18,000.00         | \$ 18,000.00         | \$ -                  |
| Spraying                                 | Westside Forestry                                   | \$ 1,497.20          | \$ 1,497.20          | \$ -                  |
| <u>Reserves - 2023 is Year 7</u>         |   |                      |                      |                       |
| Entrance Caps                            | \$5,500 over 5 years                                | \$ -                 | \$ -                 | \$ -                  |
| Mailbox                                  | \$32,000 over 10 years                              | \$ -                 | \$ -                 | \$ -                  |
| Tree and Shrub Replacement               | \$6,000 over 3 years                                | \$ -                 | \$ -                 | \$ -                  |
| Trail chips                              | \$15,000 over 5 years                               | \$ 12,680.00         | \$ 12,680.00         | \$ -                  |
| Street Signs                             | \$3,000 over 5 years                                | \$ -                 | \$ -                 | \$ -                  |
| Globes                                   | \$2,300 over 10 years                               | \$ -                 | \$ -                 | \$ -                  |
| Boardwalk                                | \$20,000 over 25 years                              | \$ 2,500.00          | \$ 1,215.39          | \$ 1,284.61           |
| Entrance Re-Landscape                    | \$75,000 over 20 years                              | \$ 2,250.00          | \$ 750.00            | \$ 1,500.00           |
| Well pump                                | \$8,000 over 8 years                                | \$ 6,357.00          | \$ 6,357.00          | \$ -                  |
| <u>Trails</u>                            |   |                      |                      |                       |
| Clean up                                 | TBD   | \$ 4,275.00          | \$ -                 | \$ 4,275.00           |
| <u>Misc</u>                              |   |                      |                      |                       |
| Misc Maintenance                         | Bill Carnevale                                      | \$ 500.00            | \$ -                 | \$ 500.00             |
| Mailbox Parts                            | Gaines Manufacturing/Bill Carnevale                 | \$ 500.00            | \$ -                 | \$ 500.00             |
| Phragmites Treatment-Annual Treatment    | PlantWise   | \$ 840.00            | \$ -                 | \$ 840.00             |
| Dead Tree Removal                        | Westside Forestry                                   | Subtotal \$ 1,000.00 | \$ 49,642.34         | \$ 1,000.00           |
|  |   | \$ 59,727.45         |                      | \$ 10,085.11          |
| <u>Administration and Other Expenses</u> |   |                      |                      |                       |
| Electricity                              | DTE   | \$ 450.00            | \$ 297.86            | \$ 152.14             |
| Insurance - Association General Liab     | NSI / West Bend                                     | \$ 1,589.00          | \$ 1,589.00          | \$ -                  |
| Insurance - Directors & Officers         | US Liability  | \$ 495.00            | \$ 495.00            | \$ -                  |
| Lawyers Fees                             | Makower Abbate Guerra                               | \$ 500.00            | \$ -                 | \$ 500.00             |
| Collection Fees (to be reimbursed)       | Makower Abbate Guerra                               | \$ -                 | \$ -                 | \$ -                  |
| PO Box                                   | USPS  | \$ 150.00            | \$ 146.00            | \$ 4.00               |
| Web page service                         | Envelopes, paper, delivery etc.                     | \$ -                 | \$ 17.98             | \$ (17.98)            |
| Office supplies                          |   | \$ -                 | \$ -                 | \$ -                  |
| Meeting room                             |   | \$ 50.00             | \$ -                 | \$ 50.00              |
| State Registration                       | Non-Profit Filing                                   | \$ 20.00             | \$ 20.00             | \$ -                  |
|  | Subtotal  | \$ 3,254.00          | \$ 2,565.84          | \$ 688.16             |
|  | Total Expense Budget                                | \$ 62,981.45         | \$ 52,208.18         | \$ 10,773.27          |
| <u>Beginning Bank Account Balance</u>    |   | 2023 RECEIVABLES     | YTD Activity         | Projected Receivables |
| Dues Received                            | Estimated Receivables (\$3 lots x \$950) = \$50,350 | \$ 53,022.67         |                      |                       |
| Cash Available                           |   | \$ 48,248.63         |                      |                       |
| Expenses                                 |   | \$ 101,271.30        |                      |                       |
| Ending Bank Account Balance              |   | \$ (52,208.18)       |                      |                       |
|  |   | \$ 49,063.12         |                      |                       |

# 04 2023 Projects

What was done in 2023?



# 2023 Vendors

Lawn Maintenance - Against The Elements

Grass Fertilization - Modern Lawn

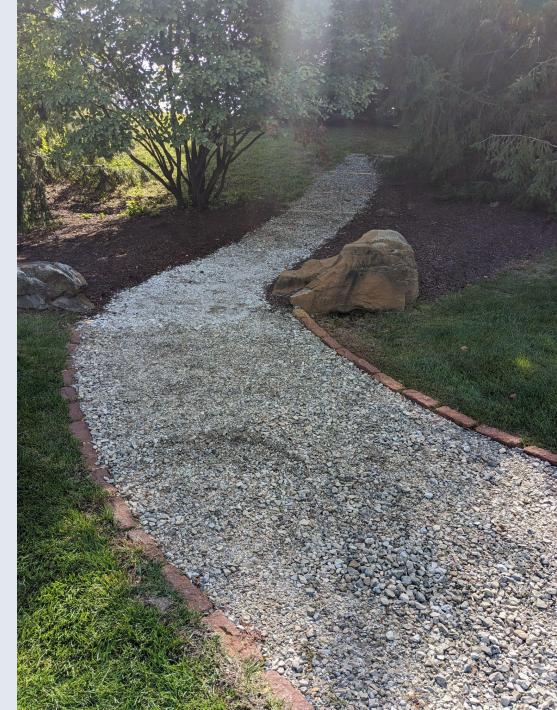
Tree Care - Westside Forestry

Entrance Planting, Mulch, and Maintenance - Just Gardens

Trail Repair - Michigan Landscape Professionals

Sprinklers - R&L Lawn Sprinklers

# Kensington Rd. Trail Repair



# Wooded Trail Railing



Installation of 2 of 3 trail railings are complete.

Final wooded trail railing will be installed this fall. Waiting on a few more materials.

# Well Repair at Jacoby Entrance



An unexpected 2023 expense! Sprinklers stopped working and it was discovered that the well pump was failing and needed to be repaired. This has been completed.

# Removed Burning Bush



The large burning bush on the west side of the jacoby entrance was removed this spring. This was reported multiple times as a hazard when pulling out of the subdivision.

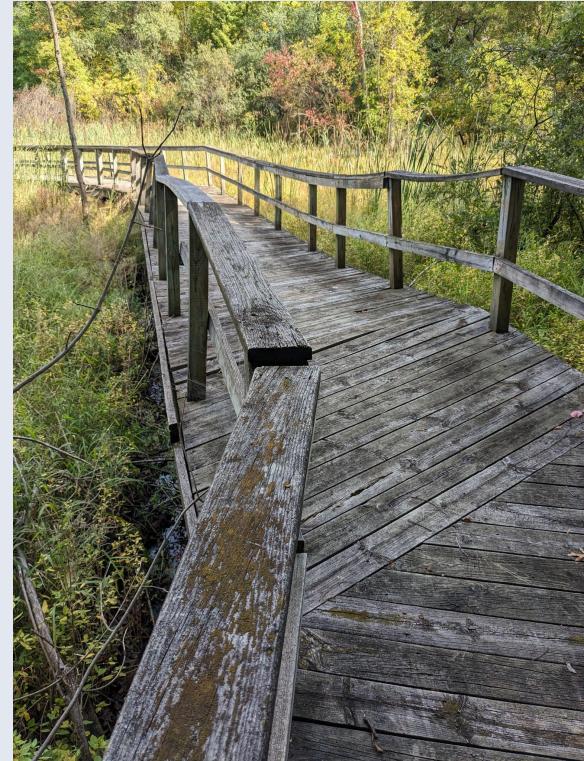
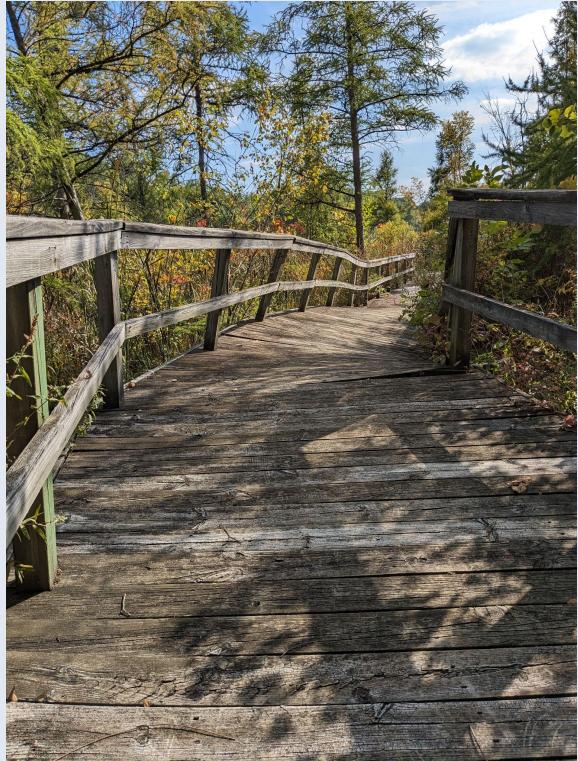
# 05 2024 Projects

What next?



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# Boardwalk Issues



# BIG BUCKS!

An **HOA Vote** will be required as an **Assessment Fee** will be needed to complete this project.

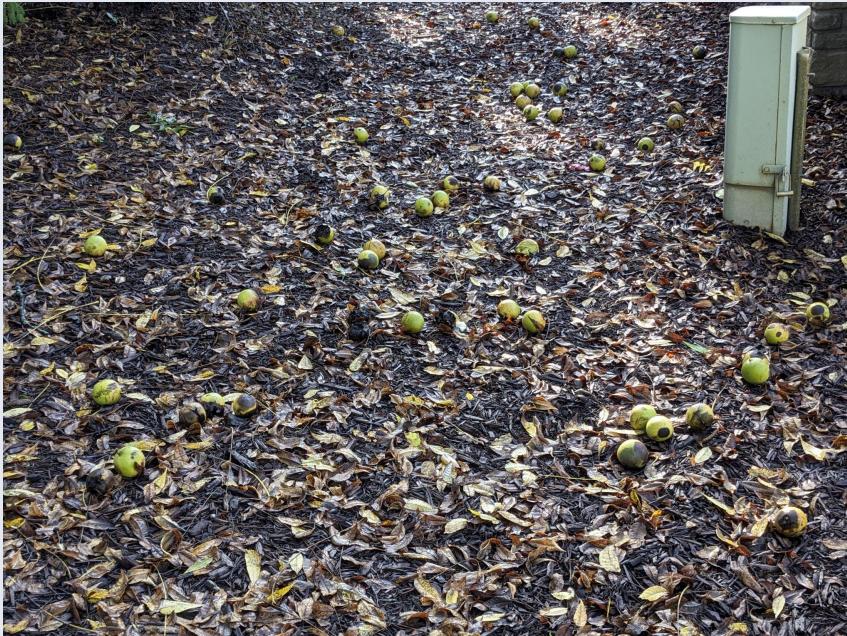
- Multiple vendors have seen the boardwork. Some not interested. Others providing ballpark quotes in the 200-300k range.

# Dead Bushes and Trees



# Walnut Tree (Jacoby)

Need to decide on a next step? It is rotting and the root cause to some landscape issues.



# Jacoby Entrance



# Scenic Court Entrance



# Kensington Entrance



# Entrance Beautification Project

# Goals for the project

- Updated look
- Stately appearance to coincide with the stature of homes
- Deer resistant products
- Color all year round
- Seasonal decor
- Same contractor for implementation of project and maintenance

# Vendor Vetting

- Five vendors considered
  - Three new vendors
  - Two with current contracts
- Factors
  - Cost
  - Interest in project
  - Attention to detail
  - Portfolio
  - Quality of work

# Vendor Selected: Your Way Property Services

- This project will be completed while maintaining your current HOA fee (\$950) and not require an assessment
- This project will occur over a two to three year time span
  - One entrance per year
    - Jacoby 2024
    - Scenic View Ct. 2025
    - Kensington 2026

# On Behalf of Your Way Property Services and OABL HOA

All homeowners will receive the following discounts:

- 10% off gardening and mowing services
- 20% off lawn care and plant health
- 10% off holiday decorations and lighting
- 10% off snow plowing
- Free landscape consultations
- Free lawn health analysis

# 06

# Get Involved

Volunteer opportunity and HOA input



# We Need Our Neighbors!



## Fall Cleanup

Saturday, November 18th  
at 10am.

Location: BLDW trailhead

## Vendor Directory

Great Experiences?  
We need your  
recommendations

**Hope you enjoyed the Fall Potluck gathering!**

# Communication Feedback

Do you feel well informed?

Website Improvements  
Quarterly Newsletter  
Email Communications  
Facebook Posts

# Thank you for joining us tonight!

Stay Connected

Website: [www.oaksatbeachlake.com](http://www.oaksatbeachlake.com)  
(Neighbor Page Password:)

Email: [president@oaksatbeachlake.com](mailto:president@oaksatbeachlake.com)

Facebook: The Oaks At Beach Lake

