

Lake San Marcos Community Association

"LSMCA"

2023 Annual Report



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## **President's Annual Meeting Report 2023**

The first thing I would like to address is the unwavering support that our members have shown in the current legal battle we find ourselves in. The case is still working its way through arbitration. Without discussing the case our legal team is convinced we will prevail. Thank you to all who have contributed to the Legal Fund.

2023 has been a very good year for LSMCA. Our events committee, under the leadership of Erin Daniels, planned a wonderful legal fund and membership appreciation evening in April. This was followed by several very informative Town Halls. Also in April was the Legal Fund Frank Sinatra fundraiser which was a huge success. Thank you to our office manager, Sandy Parker, for coming up with the idea and our events committee for making it happen. On the 4th of July, we hosted the most patriotic dog contest and sponsored an afternoon boat parade that was a big success. Thank you to Dan Worrels for serving as the marshal for the parade and keeping everything "shipshape".

The Architectural Control Committee, under the leadership of Lisa Klinger, did a great job ensuring that the CC&R's are enforced. This committee has always played a big role in keeping Lake San Marcos a beautiful place to live.

We continue to act as a liaison with City, County, and State agencies to update the LSM community of important events. LSMCA played a role in reducing the speed limit on Discovery, the portion that is residential and on the perimeter of LSM, from 40 mph to 25 mph. A big thank you to Supervisor Desmond's office for assisting us in this endeavor.

LSMCA continued to support the clubs at the lake with our Club Fair in March. We had many clubs, including social clubs, political clubs, a garden club, and sports clubs. These clubs are really the backbone of the LSM community.

The LSMCA Board meets every month and is committed to "striving to build a better community". We especially want to thank you, our members, for your continued support and loyalty.

Mike Phipps

President, LSMCA

## **Office and Membership Report 2023**

We ended the 2023 Fiscal Year with a little over 900 memberships. Short of our goal of 1,000. We will need to concentrate on building the membership for the coming year. The 2024 dues notices have been mailed out recently. We encourage everyone to promptly renew their membership if not done already so that the LSMCA can continue to protect the quality of life in our great community and receive the Quail Call newsletter.

We received several thousand dollars donations for our Legal Fund which has helped tremendously in meeting the legal fees for the litigation which has been ongoing since the end of 2021. We are extremely grateful for the generous support from our members.

We started out the year with Kelly and I in the office. We helped in organizing the Club Fair in February and maintained the office 5 days a week. In April we helped organize the Frank Sinatra fundraiser which was attended by 150 people and raised \$3,900 for our Legal Fund. Our volunteer, Darlene Aiken has continued to keep our lending library organized and Diane Martin takes all of the books and puzzles we can't use to the various libraries and charities around the area.

John Lee continues to gather money from the bird feeders which goes into maintaining the food and upkeep of the equipment.

In the past few months, we have had a few changes in the office with Kelly working more behind the scenes and continuing to handle all of the bookkeeping, banking and financial reporting. Recently you may have seen Joe Orlando from time to time and we have two new office assistants, Josie Fitzgerald and Cindy Stephens. Josie is in the office on Tuesday and Wednesday and Cindy is helping with the bookkeeping.

Recently, I've had a health setback and have been unable to be at the office. So the office is temporarily closed on Monday and Friday unless a Board member happens to sit in. I will be back in December and hopefully resume the normal schedule with the help of our new ladies. Wishing you all a healthy and happy holiday season.

Sandy Parker

## Financial Reports/Summary

By: Mike Orlando LSMCA Secretary/Treasurer

LSMCA - 2023/24 Proposed Budget	FY 2023	
	Actuals	FY 2023/24 Budget
4017 - Membership Dues	\$ 68,865.00	\$ 73,500.00
4200 - Member Services Income	50.00	-
<b>Total Memberships for 2023</b>	<b>68,915.00</b>	<b>73,500.00</b>
4100 - QuailCall Advertisements	\$ 52,215.26	\$ 50,000.00
4210 - Community Events	\$ 3,899.18	\$ 4,000.00
	\$ 56,114.44	\$ 54,000.00

	22/2023	2023/2024
Legal Beginning Balance		\$ 14,267.81
4214 - Legal Donations	\$ 33,720.00	\$ 10,000.00
6170 - Legal Expense -Special	\$ 15,435.00	\$ 15,000.00
<b>Ending Balance</b>		\$ 4,267.81

<b>Total Income</b>	\$ 125,029.44	\$ 127,500.00
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### Expense - Memberships, Mailings & Permits

6680 - QC Printing Cost	\$ 25,591.71	\$ 22,000.00
6695 - Business Reply Permit Fee USPS	\$ 860.00	\$ 1,170.00
6700 - Bulk Mail Permit Fee	\$ 310.00	\$ 310.00
6710 - Quail Call Postage Expense	\$ 4,961.00	\$ 5,500.00
6770 - Postage First Mailing	\$ 1,045.56	\$ 1,150.00
6780 - Printing First Mailing	\$ 1,422.70	\$ 1,500.00
6790 - Annual Ballots Printing	\$ -	\$ 1,200.00
6795 - Annual Ballots Postage	\$ -	\$ 500.00
6800 - Annual Ballots Supplies	\$ -	\$ 500.00
6900 - Community Events		\$ 2,000.00
	\$ 34,190.97	\$ 35,830.00

### Expense - Computer Programs & Updates

5010 · Computer Maintance Rpr	\$ -	\$ -
	\$	\$
5020 · Microsoft Office	99.99	100.00
	\$	\$
5030 · Carbonite Back Up	95.99	100.00
	\$	\$
5040 · Go Daddy	471.98	475.00
	\$	\$
5050 · CoreLogic	217.60	225.00
	\$	\$
	885.56	900.00
<b>Expense - Office Facilities</b>		
	\$	\$
6500 · Rent	19,379.59	19,500.00
	\$	\$
6900 · Gas & Electric	1,453.81	1,500.00
	\$	\$
6910 · Telephone & Internet	1,980.52	2,000.00
	\$	\$
6920 · Office Supplies	2,218.05	2,000.00
	\$	\$
6921 - Facilities	45.00	250.00
	\$	\$
6930 · Quickbook Consult / Training	-	-
	\$	\$
6940 · Clean office	720.00	720.00
	\$	\$
	25,796.97	25,970.00
<b>Expense - Payroll &amp; Taxes</b>		
	\$	\$
6600 · Employee Salaries	23,378.73	24,750.00
6610 · Franchise Tax Board - UnEmPlns	-	-
	\$	\$
6620 · Employer Taxes	5,160.98	5,445.00
	\$	\$
6630 · Payroll Service Fee	883.33	775.00
	\$	\$
6640 · Tax Preparation Teri Cohen	510.00	550.00
	\$	\$
	29,933.04	31,520.00
<b>Expense - Insurance &amp; Legal</b>		
	\$	\$
6130 · Business Policy - CID Insurance	827.42	950.00
	\$	\$
6140 · Directors liability	20,395.82	21,000.00
	\$	\$
6150 - State Comp Ins Fund	33.27	35.00
	\$	\$
6180 · Legal Expense - Monthly Fee	-	-
	\$	\$

	\$	\$
	21,256.51	21,985.00
<b>Expense - Misc Other</b>		
	\$	\$
6430 · Charge Card Merchant Fee	2,718.51	2,900.00
	\$	\$
6440 · Bank Charge	40.00	50.00
	\$	\$
7000 · Programs & Annual Events	688.92	800.00
	\$	\$
7100 · Misc Expenses - Gifts etc	1,008.95	750.00
	\$	\$
	4,456.38	4,500.00
<b>Total Expenses</b>		
	\$	\$
	116,519.43	120,705.00
<b>Total Income</b>		
	\$	\$
	125,029.44	127,500.00
<b>Total Expenses</b>		
	\$	\$
	116,519.43	120,705.00
<b>Net Income for 2024</b>		
	\$	\$
	8,510.01	6,795.00

## **Quail Call Annual Report**

### **By: Quail Call Chair Dan Worrells**

The Quail Call is a monthly newsletter published by the Community Association as a community service to its members and is now in its 19th year. Our distribution is currently about 925, with one copy sent to each member or their designated occupant, and our advertisers. In addition, the monthly ads are available in color on our website, lsmca.com. The Quail Call is a major inducement to LSMCA membership.

Much of our issue is dedicated to articles that we receive from LSM clubs and organizations. In addition, a number of residents contribute articles to the Quail Call. Dr. Jim Brown, Tom Strathairn, Barb Whitesides, and others have contributed throughout the year. And our LSMCA committee members contribute articles about their committee activities.

The Quail Call is produced by a team. Dan Worrells is the Editor. Barbara Dove is the Associate Editor, with Associate Editor Adela Franco currently on sabbatical. Sherri Sumner contributes an occasional article and contributes ideas for our cover. Ken Seals, Matt Marshall, and Kelly Lara capture life at the lake with their cameras. Scott Woodruff provides us with marketing and design ideas.

Our means of production have not changed. One volunteer editor produces the entire QC for one month, with editors Dan and Barb taking turns. Once the editor is done, he or she sends a digital file to our printer, Alphagraphics, for printing, assembly, mailing preparation, and delivery to the post office. In addition to the production of the Quail Call, our office staff, Sandy Parker and Kelly Lara, handle all of the business issues, such as billing and accounting.

Quail Call revenue from our advertisers is a significant part of LSMCA's income, which is needed to pay our office staff, rent, utilities, etc., as well as printing and mailing the Quail Call. If you deal with one of our advertisers, please let them know you saw their ad in the Quail Call. If there is a new or favorite business that you think our residents should know about, let the office know and we will contact them about advertising.

We are currently looking for another volunteer Associate Editor. If you have some spare time, have decent computer skills with Microsoft Office applications, and would like to be more involved in our community, please contact Editor Dan Worrells at 858-232-1963 or dan.worrells@gmail.com for more information. The editors hope that you enjoy the Quail Call and find it interesting and informative. Thanks to those who contribute their articles and to our advertisers. Suggestions are always welcome.

### **Communications Report**

**By: Communications Chair Jeremy Meadows**

The LSMCA Facebook page now has surpassed 235 followers and we would like to see this grow even more next year. One of our main goals for membership is to increase our presence and access to younger families or newer families that have moved in recently and might not know about LSMCA. We also have updated our website, and utilize an ongoing email blast communication with all of the lake residents to keep them informed of upcoming events and other important information. We added an LSMCA Instagram page as well. Please follow @lake.san.marcos.communityassoc

### **Annual Water Quality Report**

**By: John Paquette Water Quality Chair**

(No significant updates in 2023) Here is the report from 2022. The long-awaited aeration system was installed by the Joint Parties(Citizens Development Corporation, the Cities of Escondido and San Marcos, and the County of San Diego). The system was activated on April 5, 2022.

The aeration system is configured to release air from 10 dual-port diffusers located in the deeper portion of Lake San Marcos. The pilot system is intended to mix the deep waters with the following benefits: Reduction or elimination of anoxic conditions at the bottom of the lake with an associated reduction in the release of nutrients from the bottom sediments; Increased dissolved oxygen levels in lake water due directly to the aerators as well to greater exposure of the deep lake water to atmospheric air (and oxygen); Reduced algae growth resulting from the circulation patterns induced by the aeration system.

## **Annual Traffic and Safety Report**

**By: John Paquette Traffic and Safety Chair**

(No significant updates in 2023) Here is the report from 2022. LSMCA requested a reduction in the posted speed on Discovery Street from La Sombra Drive to San Pablo Drive. Our reason for the reduction was that this portion of Discovery Street is entirely residential and should have a posted speed of 25mph, not the then-posted 40mph. The County agreed with our assessment and lowered the posted speed to 25mph. The County posted a new 25mph sign in both directions from San Marcos Blvd to La Sombra Drive on Discovery Street along with a new 25mph painted on the road.

In August 2022 the traffic signal at San Pablo Drive and Discovery Street was approved by the San Diego County Board of Supervisors. Construction was to begin in early 2023. We have requested an update from the County and will report to the community as soon as we receive new information.

## **Annual Events Report**

**By: Erin Daniels Events Chair**

Last year we continued with our normal annual events, The Club Fair and 4th of July Patriotic Dog Contest and Carnival. There were a few new event additions as well. We hosted our first Member Appreciation Event in April and had a wonderful turnout! In May we had a fun Frank Sinatra Tribute Show Fundraiser raising over \$3,500 for our Legal Fund. We also helped host a Memorial Day Ceremony and Golf Cart Parade. A new addition to our Independence Day celebrations was a golf cart parade held a few days prior to the 4th. Events for the rest of 2023 include a Halloween Golf cart Parade, co-sponsorship of a Turkey Trot on Thanksgiving morning that benefits Discovery Elementary and a Holiday Golf Cart and Boat Parade. Our monthly Town Halls continued with guest speakers on Cyber Security, Pest Management, Women's Health and more.

In 2024 we will continue our annual efforts. If you have any suggestions for events or topics you would like to have the LSMCA explore please reach out to us!

## **ARCHITECTURAL CONTROL COMMITTEE (ACC) ANNUAL REPORT**

**OCTOBER 2022 - SEPTEMBER 2023 (prepared 10/16/23)**

**By Lisa Klinger, ACC Chair**

**The Architectural Control Committee reviews and makes determinations on both Architectural Request Forms and Complaints.** LSM homeowners and residents should submit Architectural Request Forms before making exterior changes to their homes or properties. If an LSMCA resident believes a neighbor's property is out of compliance with the Declarations of Restrictions, the resident



can submit a Complaint form to the ACC. Complaints are kept confidential. The website for the ACC is: <https://lsmca.com/architectural-guidelines> .

### **SUMMARY for Oct. 2022 - Sept. 2023:**

**34 Applications** filed and approved.

**12 Complaints** filed with the ACC.

### **DETAILS:**

**Topics of Applications** (Adds up to more than 34 because often 1 Application was for several different kinds of improvements. E.g., Re-roof & solar, Landscape & re-pave driveway.)

Most common areas were Solar Installation and Re-landscaping.

- Solar - 13
- New Roof - 4
- Exterior improvements - 4
- Exterior remodel/extension - 2
- Repaint exterior - 3
- Fence - 2
- Patio and/or patio cover - 4
- ADU - 2 (but one really is a shed, not an ADU)
- Re-landscape - 5
- Driveway - 2

### **Topics of Complaints**

Most common area of Complaints was Unkept Yards. Next was concern re: view blockage.

- Unkept yard - 4 (1 also said weeds from neighbor's yard were encroaching)
- Motor home in driveway - 1
- Golf ball net - 1
- Tall flag pole - 1
- Drainage from area above their property - 1
- Lake View. Complaint that neighbor's home remodel will block other neighbors' Lake views - 1
- Unauthorized construction, parking obstruction, numerous vehicles in yard - 1
- Dogs in neighbor's yard bark for 8-10 hours while neighbor is away - 1
- Lake view. Complaint that neighbor's retaining wall & Landscaping & patio extension will block their view - 1
- Fence removed between 2 homes, leaving open path to pond above - 1
- Bus in driveway & basketball hoop on street - 1
- Neighbor's backyard fence blocks view -1 ongoing from 2022 - in arbitration

The ACC and LSMCA try to facilitate mutual resolution of complaints between neighbors. Unfortunately, one resident who felt their view was blocked by a neighbor's fence filed an arbitration action, and this has continued in 2022 and 2023. We expect it to be resolved in the first quarter or half of 2024. We appreciate the support and donations we have received from the Community to the LSMCA Legal Fund.