

A Long Range
Planning Document
1999-2014

Planning Committee

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Section 1 Planning Rationale and Methodology

1.1. INTRODUCTION

This Master Plan represents the Planning Committee's best composite judgment of which programs and concepts, if followed to completion during the next 15 years, will result in developing the best overall community at Lake Monticello.

The Committee has attempted to make this plan as all inclusive as practical, in order to provide the BOD and LMOA's members with a comprehensive picture of the size, complexity and interrelation of our various proposed projects and programs.

Planning is, by its very nature, a classic exercise in compromise. Individual recommendations may not, at first glance, seem the optimum choice for a particular program. However, when considered with other interrelated areas and highly significant variables, the Committee believes the designated choices provide the best, most practical, solutions for all programs so that they blend together to work toward a common goal.

In addition, LMOA's members represent a very broad spectrum of people with highly varied backgrounds, living under totally different current circumstances. Our community members vary widely in age, education, type of family, financial situations, life styles, vocations, interests, as well as in other ways, and our model for a future community must provide the best composite community environment possible for this mixed population. To accommodate fully this broad mix of requirements and people, the compromises reflected in this plan are both essential and unavoidable, but, in the Committee's opinion, represent the best alternatives for a harmonious yet comprehensive plan, for the future of our community.

1.2. BACKGROUND

The original developer of Lake Monticello Corp. (later merged with Monticello Development Corp.) started our Lake Monticello community as a land sales venture. HUD documents and other real estate promotional papers touted the development as "the delights of rural living". The earliest buyers seem to be divided between mostly "vacation home" buyers and investors who bought the land in hopes of realizing a future profit. The community soon evolved into a mix of full-time residents and absentee owners.

In the early days, the absentee owners were the majority and the BOD tended to favor their desires – often at the expense of those living here full time. As a consequence, it was extremely difficult to raise dues to compensate for the rapidly rising inflation so rampant in those days and to meet the very real needs of a rapidly growing community. The results of this dichotomy between income and financial needs was to let maintenance and other essential basic items slide. The inevitable long-term result was the currently observed deterioration of much of our infrastructure, facilities and amenities. In addition, the highly restrictive by-laws – great for selling real estate – made it very difficult to change the underlying financial structure – even to compensate for the steady inflation and a rapidly changing mix of resident classes.

A 1974 deed describes Lake Monticello as a “Recreational Community”. In the intervening years, we have further evolved as people have bought and built homes for their retirement and as younger couples have moved here because of the communities superior quality of life and to escape the high cost of real estate and taxes in the Charlottesville area. With this new mix of residents we now have many of the attributes of a full-fledged municipality – a large town or a small city.

Our Corporate community has become quite complex, unfortunately our current systems of management and government have not kept up with this evolution.

1.3. OUR LAKE COMMUNITY TODAY

There are now on the order of 4602 residential (voting) lots. There are 9 non-revenue lots owned by LMOA. There are 9 condominiums and 6 town houses. This makes 4616 voting entities at any given annual meeting of the members at this time.

As of May 1999, there were 2720 completed homes here at the lake. For the purposes of this discussion, completed means that a County Certificate of Occupancy has been issued. Another fact, 90 homes are either under construction or permits to build have been issued. A few years ago, a typical under-construction rate was 140 to 160 structures in any given month. However, the rate in 1999 is hovering around 87 to 90 each month. In fact, building rates have actually decreased from over 200 houses per year in 1994 to about 140 houses per year today.

1.4. LOOKING TO THE FUTURE

Lake Monticello needs a long-range plan which would basically be a map allowing us to see where we are trying to go - our ultimate destination - a Vision for Lake Monticello.

At the same time, looking at our proposed route ahead of time allows us to avoid the equivalent of such things as bad roads, construction delays, congestion, detours, etc. Looking ahead also allows us to avoid making bad decisions. Above all, it permits us to visualize how our planned destination relates to and interfaces with other data, factors and activities recorded on our “map”.

Constructing this map of our future needs and desires will help us to define our community goals and objectives more effectively and more specifically, in order to accomplish the following major projections, analyses and goals.

1.4.1. GOALS:

- Govern and manage Lake Monticello Owners’ Association (LMOA) for the benefit and comfort of the property owners.
- Provide for the Safety and Security of owners, residents and guests of Lake Monticello.
- Establish appropriate rules and regulations for the administration and management of LMOA.

1.4.2. OBJECTIVES:

- Determine long range trends in Lake Monticello's population, so that we can make projections of future LMOA needs.
- Define currently unresolved and potential issues.
- Analyze these issues in sufficient depth so that we can suggest alternate viable solutions for initial BOD (and ultimately residents') consideration.
- Determine the most viable proposed alternatives.
- Accurately articulate the advantages and disadvantages of the most viable of these proposed alternatives to show how each can effect a solution to individual current or future problems.
- Arrive at a rational prioritization of unresolved problems according to urgency and/or level of impact by quantifying the impacts of the options in terms of cost and potential community benefits. If possible, we should include maximum time frames in which to complete solutions.
- Define the long range implications and hidden costs inherent in delaying action.
- Define key interfaces among current and projected future problem areas so that a solution which seems ideal doesn't either obviate or exacerbate other higher priority long range solutions to critical needs. In this plan, if the above goals are met, planning will systematically address specific areas of need and will subsequently allow us to suggest priorities to the BOD.

1.4.3. ASSUMPTIONS AND PLANNING FACTORS:

- Strategic planning is a Board of Directors function and responsibility.
- Strategic planning provides a disciplined, structured foundation for management decisions.
- Strategic planning and strategic management must be done at the Board of Directors level. Everything else is and should remain operational management.
- Lake Monticello probably never will be completely "built out." Construction and population growth will taper off to about 150 new homes per year by 2000. By year 2005 the rate should be close to 140 (perhaps fewer) new homes per year.
- Population will reach 10,000 by year 2005.

1.5. CENSUS AND SURVEY

To help understand the needs and will of the membership, the Planning Committee is preparing a membership survey and a census. The survey will be conducted in the fall of 1999. It will address questions concerning members' desires for the community. The census, to better determine the demographics of the community, will be distributed with the ballots for the year 2000 election of Board Members. Both the survey and the census should be updated annually by the Planning Committee.

1.6. PROJECT MANAGEMENT

Many successful organizations use systematic project management as an aid in achieving their goals and objectives. The volunteer basis of our LMOA Board of Directors (BOD) and

Committee System, supported by a professional operations staff, is particularly adaptable to the use of those techniques. A Five-Step system is recommended for LMOA:

Step 1 For a given goal or objective, the BOD:

- a. Defines the task and the objectives.
- b. Assigns the task to a Project Manager. The Project Manager may be the General Manager. It may also be a specific committee chairperson or individual who accepts the task.
- c. Establishes dates for completion of the remaining steps.

Step 2 The Project Manager provides an implementation plan to the BOD. It includes:

- a. Implementation details.
- b. A schedule of completion dates for major milestones.
- c. A funding plan and a life cycle support plan.

Step 3 The BOD approves the implementation plan.

Step 4 The Project Manager

- a. Implements the plan.
- b. Reports progress quarterly to the BOD.

Step 5 Program Complete:

- a. Objectives satisfied.
- b. Membership informed.

Within the steps shown above are many smaller steps and problem resolutions. Interface between the Project Manager and the BOD for clarification of project definition and for problem resolution will often need to occur more frequently than implied by the basic steps.

A motivated Project Manager and a concerned BOD are both essential to the success of this system. Gantt charts that show planned and actual completion dates for each milestone of the project are very useful tools to enable both parties to keep the project on schedule. The project manager maintains these charts. A top level Gantt Chart is shown on the last two pages of the Appendix.

1.7. FINANCIAL APPROACH

No Master Plan, no matter how well conceived, researched and documented, will serve as an effective tool for improving our present community and preparing us for the future, unless we, as a community, are willing to provide the essential funds needed to, at least, maintain our current levels of facilities, infrastructure and services. Moreover, to handle our future growth and to ensure the continuation of the promised Lake Monticello life style and amenities that led us to initially move here, we need to not just maintain the status quo but continually improve our community wherever practical and financially prudent.

Our current rundown facility and infrastructure problems are the direct result of two highly interactive major factors:

1. significant weaknesses in past management and
2. a basic failure on the part of our residents and absentee owners to provide adequate community funding to take care of those critical things that must be done.

The roads and drainage situation is a classic example. Unfortunately as a community, we now have to pay for our past unwillingness to deal with financial realities. We need to urgently address these funding issues before things get worse.

No business, community, or personal budget can long survive paying bills in what is basically an inflationary economy while staying on a fixed level of income. An inflation rate level of 2-2.5% per year may sound benign—it isn't. The power of compounding guarantees this financial fact of life. We can no more pay for today's services with yesterdays dollars when operating Lake Monticello then we can accomplish this in our own home finances.

We residents and lot owners have a right to expect that our fees will be used wisely, effectively, and efficiently. Many recent management changes have been made to move us in this direction. On the other hand the BOD and the new General Manager must be given the funding tools needed to permit the changes to happen. No member ever wants a rate increase nor is it practical to continually go back to LMOA's residents for new special assessments each time we have to deal with inflation driven funding problems.

1.7.1. COLA

Fortunately, there is a practical solution that is both straightforward and easy to understand. Above all it is fair! LMOA needs a yearly adjustment — a COLA. This would be an automatic Cost of Living Adjustment designed to offset the impact of inflation on the cost that LMOA must pay each year for outside services, materials, contracts, manpower, etc. This COLA should be applied to every fee paid to LMOA. The rate would be established each year, based on the National Consumer Price Index, and would be applied in the same manner in which Social Security payments are adjusted. Using this system, fee increases would be fully predictable both as to when and how much. Both LMOA management and all our members would know just what to expect and could plan their yearly budgets accordingly.

1.7.2. AMENITIES ADJUSTMENTS

Some of our amenities are “free” to LMOA members in that the cost of operation of the amenity is paid from the LMOA general fund. Other amenities charge a specific fee to the user to partially (or entirely) pay the cost of operation the amenity. These amenities with no fee include the lake, the beaches, the playgrounds and the security system, etc. User fees paid for the golf course, the marina, the pool, the dining facilities and the tennis courts cover some or all of the cost of operation of these amenities. Making all amenities self-supporting may be both impractical and socially unacceptable to the membership. On the other hand, the fact that there are user fees for some amenities indicates that the membership accepts some type of fee structure. Any fee system that makes an amenity self-supporting will help LMOA with future budget management. Even though adding or increasing a user fee for any amenity is likely to be resisted by some users, an analysis of our fee system would be timely at this point. An Ad Hoc Study should be implemented to conduct such an analysis.

1.8. LIST OF MAIN RECOMMENDATIONS
(Their cost impact, priority and timing)

<u>Cost Impact</u>	<u>Need Priority</u>	<u>Timing</u>
A=Major	1=Critical	A=Now
B=Medium	2=Important	B=1-2 years
C=Low	3=Beneficial	C=2-6
D=Increase funds		D=6-15

<u>Recommendation</u>	<u>Cost Impact</u>	<u>Need Priority</u>	<u>Timing (startup)</u>	<u>on Page</u>
<u>Section 1 Planning Rationale and Methodology</u>				
Institute & maintain a COLA concept for all LMOA fees and dues	D	1	A	8
Make all paid amenities such as golf, tennis and pool, self supporting	D	1	A	9
<u>Section 2 Administration and Operations</u>				
Expand Administrative Staff	B	3	C	13
Use Tested Project Management tools to lay out major projects	C	2	A	6
Move quickly toward electronic communication and filing	C	2	A	33
Assign responsibility for cross-committee activities	C	1	A	14
Encourage LMOA members to become more active in Fluvanna County and State activities	C	1	B	14
Activate & maintain a preventive maintenance program	B	1	A	16
Address ways to improve food service & define needs versus willingness to pay for the service	C	1	A	16
Change rules & regulations to improve run-off control	C	1	A	15

Ensure a high level of road & drainage maintenance in the future	A	1	A	37
Continue & improve the lake preservation programs	B	1	A	18
Support an effective Safety & Security program	A	1	A	18
Improve rules & regulations; purge those that are no longer useful or enforced	C	1	A	13
Plan for our police force to handle a community of 10,000 by the year 2003	B	2	B	19
Develop walking, jogging & biking trails	B	3	B	20
Develop a proactive approach to wildlife control	C	1	A	21
Correct line-of-sight & road marking problems	B	1	A	22
Improve golf course maintenance	B	1	A	23
Improve boating rules & enforcement	C	1	A	25
Support improvements to our beaches	C	2	B	25
Increase maintenance & support improvements to the main pool	B	2	B	27
Form a working group to research the development of a youth social center	C	3	C	27
Develop the fishing pond area to increase utilization	B	3	C	28
Phase down, close out & sell campground	D	1	A	28
Improve playgrounds; improve & increase sport field capabilities	B	2	B	29

Create a proper meeting room for BOD	B	2	A	30
Solve the Tufton Gate issue	C	1	A	30
Institute a member survey & census; update it each year	C	2	A	6
Support fishing program	C	3	B	31
<u>Section 3 Capital Improvements</u>				
Acquire new permanent administrative space	A	1	A	33
Configure the clubhouse to improve its utility for meeting rooms & dining space	B	2	B	34
Continue to implement 7-year plan to address roads & drainage problems	A	1	A	35
Plan for an advanced gate system	A	2	C	39
Improve the golf course	B	2	A	41
Improve golf pro-shop & parking	B	1	A	42
Develop a year-round swimming pool	B	2	B	36
Develop a permanent storage area for RV's & boats	A	2	A	42
Develop a multi-purpose recreation facility	A	2	A	37
Remodel the marina building to provide improved year-round use & additional meeting space	B	2	C	37
Improve boat & vehicle parking at the marina	B	2	A	39

Implement the real estate study as recommended by the Real Estate Ad Hoc Committee	A	1	A	See Study
Develop additional docking	B	3	C	39
Improve Broadcast Communications	C	2	B	39

List of Abbreviations

LMOA	Lake Monticello Owners' Association
BOD	Board of Directors
R&R	Rules and Regulations
WJB	Walking, Joggers, and Biking Trails
RV	Recreational Vehicles
VDOT	Virginia Department of Transportation
COLA	Cost of Living Adjustment

Section 2 Administration and Operations

2.1. ADMINISTRATION

LMOA has rapidly expanded not only in population density, but also in complexity. Unfortunately, we have not expanded out professional staff in kind. Neither the numbers of key support personnel nor the specialized technical skill required to handle the expanded service needs resulting from LMOA's growth are adequate.

Until just recently, LMOA has not been willing to make the required investment in time, money and training required to stay abreast of today's changing needs and complexity. We need to revamp our present outdated personnel system and determine and prioritize today's most critical requirements. Currently, we need personnel with expanded computer, engineering, contractual and financial skills in order to effectively cope with today's more sophisticated problems. LMOA should move to upgrade future staff skills by providing an adequate investment in training, or we will not be able to maintain a viable support and management capability.

2.2. RULES AND REGULATIONS

General: Rules and Regulations should be written, approved and/or retained only where there is a proven current or future need.

The appropriate number of Rules and Regulations cannot be determined in advance, but we must not hesitate to enact those which are found to be necessary for the overall good of the community, while trying to ensure that we do not "short change" the community by leaving anything open ended. Nor should we be afraid to propose additional rules, if failure to do so leaves matters (either of a first or lower priority) unaddressed.

If Rules and Regulations are approved, they should above all be fair, consistently exercised, equitably applied, enforceable and enforced, while still using common sense in their application. If enforcement is not possible or not adhered to, then a Rule and/or Regulation is meaningless and should subsequently be removed from our list of governing tenets.

In any system of regulations and controls, it is always difficult to balance the innate conflict between the obvious need to respond to our overriding, overall community needs while at the same time allowing for the strong natural desire to maintain an adequate degree of individual freedom of choice. Neither side of this equation balance can dominate if we are to have a contented and highly cooperative community environment. Compromise is the basis of any truly functional democratic organization. But, on the other hand, we should not fear to pass a rule that is strongly for the good of the community, even though it may impinge somewhat on the rights of some individual homeowners.

During our research for the preparation of this plan, the committee continually came across many discouraging examples of Rules and Regulations that, while they once may have made

sense, no longer do. There are also numerous examples of important rules and regulations on our books that have seldom if ever been enforced. Even worse, a number of meaningless and petty regulations have been vigorously enforced (often very inequitably). It is obviously necessary for the BOD to immediately initiate a full scale, systematic review of all of our existing regulations, purging Rules and Regulations where appropriate, while at the same time adding and beefing up our Rules and Regulations enforcement where it is needed. This task can be best addressed by assigning different sections of the overall regulation documentation to a series of ad hoc volunteer working groups. This is far too large a burden to throw on our overworked staff. After a one time in-depth review and update has been accomplished, a new special committee should be formed each year to: perform a yearly update audit, write a report--including suggestions for improvement or changes in the Rules and Regulations--and submit it to the BOD.

2.3. CROSS-COMMITTEE INTERFACES

1. Major cross-committee difficulties arise when an issue or a problem falls into the purview of more than one committee; or even worse, under the purview of no committee at all. Consider the following:

- A. Geese that cause pollution on the Golf Course ponds fall under Lake Preservation of Golf or Safety and Security. They are health menaces and wildlife control problems. Only the golf portion of this problem has been (partially) solved.
- B. Dredging of the lake is probably caused by uncontrolled run-off. Can Buildings and Grounds solve this problem? Or people raking leaves into the lake (Safety and Security?) If homeowners or builders are clear-cutting lots, should Compliance control?
- C. Water safety is another example of a complex issue. If there is a single entity in charge, it is the Water Safety Patrol. This organization has no police powers and, consequently, rule enforcement is minimal at best. The system works only because most people follow the rules voluntarily. This seems to be changing. See Boating Regulations, paragraph 2.11.1.

2. Clearer lines of authority must be established for water safety and other, similar multi-committee issues. A coordination and integration issue seems to exist here. Ideally, Management should handle the issue. It could be handled by a separate committee or by the Planning Committee. Action to fill this responsibility vacuum needs to be taken now before it gets worse.

2.4. COUNTY INTERFACES

At the present time, Lake Monticello residents pay well in excess of a third of all Fluvanna County taxes. However, because of the unique nature of our Incorporated Community structure, we often do not receive the full benefits provided to other county residents; for example: roads, snow plowing, police, etc. This short fall is a direct result of our choice as to the type of community we wish to live in, not because of any slight on the part of the county.

On the other hand, it would appear reasonable for Fluvanna to recognize Lake Monticello's large and growing population and its major financial contributions to the county's finances by giving more attention and financial support to the Lake Monticello area. The county and state roads that lead to and from the Lake and Charlottesville are just one example.

The existing roads surrounding Lake Monticello, such as Routes 600, 618 and 616, were designed in years past for rural farmland traffic, not for the current heavy commercial and to-and-from home travel they must now handle. As a result, there are many blind intersections, such as the one on Rt. 600 and Rt. 53, which need attention. Speed limits in some areas need to be better enforced. Many local existing roads, such as Rt. 600, Rt.616, and Rt. 618, need to be further widened and some of their many extremely bad curves eliminated, or reduced — wherever practical. Much of this requires County interface with the State.

Another example is laws and regulations. We are a part of Fluvanna County and of course we must abide by their rules and regulations. However, many of these governing tenets were written years ago and never anticipated an entity anything like our Lake community. Consequently, many of these laws now prove inappropriate to our situation and prevent us from making much needed changes to our own rules and regulations—the permissible level of fines is just one example.

It is fully understood that Lake Monticello’s requirements must compete with many other critical County priorities for funding and attention. However, our needs won’t necessarily receive our proportionate share of the available funding unless our Lake residents become much more actively involved than they have been to date, in County and State level politics and activities. We must contribute more of our time and energy to the many excellent voluntary committees which often favorably influence the political decision making process.

2.5. RUN OFF CONTROL

As Lake Monticello approaches full build out, increasing amounts of land which were once heavily wooded have now been largely denuded of vegetation through a systematic removal of a high volume of trees and small brush.

The results are increased run off into the lake along with attendant high amounts of soil erosion due to the increased volume and greater velocity of the unimpeded water flow. If better control of this run off situation is not soon initiated, a number of predictable difficulties will result:

1. Increased burden on an already over taxed road and storm drainage system.
2. Increased need to dredge the lake’s various coves — at substantial cost to LMOA.
3. A requirement to construct a series of run off holding ponds on incoming streams.
4. A future danger of mud slides and soil slippage with resultant damage to community or individual property bordering our lakes and streams.

LMOA currently has a number of regulations in place governing the cutting of trees and brush; however, these rules are largely ignored and little meaningful regulatory action has been taken to date. Much of the worst damage so far is the result of owners and builders refusing to abide by the regulations. In some cases these clear cutting actions were taken without the owner’s knowledge or permission.

In these flagrant cases, penalties are seldom invoked and, if they are imposed, they are so insignificant as to be meaningless. In addition, penalties when enforced are against the owner not the builder and the contractor doing the cutting. Consequently those few builders and contractors who flaunt the rules have nothing at risk and no incentive to reform their practices.

The solution has three concurrent parts:

1. Educate owners as to the impact of excessive cutting of vegetation on their own property and on the community as a whole.
2. Increase the enforcement of existing rules with the imposition of meaningful penalties and create new regulations where needed.
3. Take immediate steps to place the burden for compliance on all three, the builder, tree contractor as well as on the owner. If the builder and contractor repeatedly fail to comply with acceptable standards, then withhold approval to build and cut in this community in the future.

2.6. MAINTENANCE OF FACILITIES AND AMENITIES

Many of our facilities, amenities and infrastructure items have slowly deteriorated and are now in an unacceptable state of repair. LMOA obviously needs to stop this deterioration and to reverse the process. However, it is most important that we not stop there but move from a reactive maintenance mode to a proactive one. We need to develop an aggressive preventive maintenance program, which predicts problems and then actively moves to prevent them from occurring. Our road system and golf clubhouse are good examples of what happens when this is not done. It is often less costly to take care of things early; the cost of delay is far more expensive in the long run.

2.7. FOOD SERVICES

Food service has radically changed over the years. Until the last few years there has been little or no local competition to LMOA's own facilities. Today, however, we have both full service and fast food services located close to our community.

Furthermore, it is reasonable to predict that the number of these new businesses will grow as the number of LMOA's residents increase and as the number of new home developments in close proximity to Lake Monticello continue to expand. It is logical to expect that this growing competition will significantly impact our LMOA Food Service Operations as their major advantage of close availability is undercut.

Historically, food service operations at Lake Monticello have had to be subsidized in order to survive. This subsidization requirement is not unusual for controlled communities. The amount of subsidy required has been substantially reduced in recent years through improved food quality and service, but mostly by selectively reducing the hours of food service operation.

However, in planning for the future, before we recommend an expanded investment in food service operations, basic questions need to be resolved by LMOA residents:

- Do we need to continue food service operations? In other words, is the cost of this service worth the benefits derived?
- If we feel these services are desirable (many of our residents do), by how much are we willing to continue to subsidize their cost in order to maintain this amenity? Furthermore, in what manner will we acquire the required funding?

- Can LMOA do anything further to make these services pay for themselves or at least break even?

There are a number of possible options. Some have been suggested in the past. For example, is the community willing to open our Club facilities to outside diners on a controlled basis to help increase usage and minimize our food service losses? This issue needs to be revisited. Other communities function this way. In effect, we permit a form of this type of operation in the golf arena and in Associate Membership in order to expand usage and reduce the cost of golf and pool operations.

It is doubtful that the increased numbers of residents moving to the lake, who may use our facilities, will continue to offset the impact of increased competition from commercial restaurants just outside the lake.

It is questionable whether our food service can still compete if they continue to be open only on a highly selective, part time basis.

A large number of other country clubs and recreational communities impose a mandatory food charge per month which members must use or lose, i.e. they must use the facilities up to a set amount, or they obtain no benefit from the mandatory monthly charge. Do we want this? There are strong indications that the bulk of our members do not.

If LMOA decides that the Club Food Service is essential to our community in future years then the following steps need to be taken at this time:

1. We need to reexamine other options (such as those mentioned above) i.e. open our facilities to outside diners, accept a use or lose charge, or consider contracting out our entire food service operations.
2. Or, we need to resign ourselves to paying for a yearly food service loss—in effect the yearly costs of subsidization. Do everything we can to minimize the costs but accept them. In the past, our residents have rejected all of these options. Unfortunately, there still is no free lunch.

At the very least, in fairness to our food service personnel, LMOA needs to stop asking them to compete in volume, quality and ambiance with local country clubs that operate using totally different revenue sources and assets.

The BOD needs to establish an Ad Hoc Committee now to re-examine and report on the Food Service issues described above. The Planning Committee is willing to serve on such a committee.

2.8. LAKE PRESERVATION

LMOA needs to continue the current highly productive programs being carried out by the Lake Preservation Committee.

First we need to continue the present successful efforts to control Hydrilla growth in the lake by a combination of mechanical raking (by individual residents), chemical poisoning (where practical) and the selective use of Grass Carp.

Both the use of grass carp and chemical herbicides must be closely controlled by the committee and by the cognizant State and County officials to make sure that these tools are applied both correctly and sparingly. This is necessary because Hydrilla controls can have highly undesirable and harmful side effects that are just as bad as the Hydrilla problem.

Second, we need to carefully measure the full impact and benefits of the extensive dredging that took place in late 1998. If we determine that the effort was both successful and cost effective the committee then needs to develop a long-range plan and budget to cover and implement future dredging operations for those areas where we can predict a need.

In addition, these future efforts need to be closely coordinated with concurrent LMOA efforts designed to control excessive run off, erosion, and siltation. Otherwise, we run the risk of treating the symptoms rather than solving the basic problem.

Third, LMOA's Lake Preservation Committee should continue and expand its excellent ongoing program designed to monitor dangerous bacterial activity in the lake. Furthermore, we need to determine whether any high bacteria counts found are the result of sewage runoff, concentrations of indigenous Canada geese, or are from other sources and then develop practical recommendations for solutions.

Fourth, as a result of the recent dredging activity, the normal winter draw down of the lake water level did not take place. Consequently, LMOA now has a unique opportunity to determine, on first hand test basis, the relative advantages and disadvantages of drawing the lake down each year and then make recommendations to the BOD on the value of this draw down practice.

2.9. SAFETY & SECURITY

Many of the people moving to Lake Monticello have come from other areas of the country where security, crime, drugs, etc. are critical daily issues, which they wished to get away from. One of the major benefits of being here at the Lake is the increased level of security that our gate controlled and patrolled community provides. If the current good level of security we presently enjoy is to be maintained, or expanded upon, there are a number of key issues that need to be addressed and dealt with over the next 15-year time frame.

Among these are the following:

1. Center striping of main roads.
2. Walking and biking trails.
3. Improvements to major entries and exits — ingress and egress — public roads.
4. Improvements to road signs.
5. Clearing of obstructions to a driver's vision at corners and entries.
6. Wildlife control — particularly geese and deer.
7. Better lighting in key areas such as gates etc. (This is also a Buildings and Grounds item.)
8. Additional personnel for our police force.
9. Continued high level of community support of police and safety personnel.
10. Constant update to adopt new and improved police equipment and methods.
11. Systematic improvement of our security and safety laws and regulations.
12. Improved enforcement of water safety regulations
13. Long range improvements to our future system of gates and entry control. (See Section 3.1 for details.)

Note: The Safety & Security Committee is currently addressing many of these problems.

2.9.1. THE POLICE FORCE

An effective and up to date police force is an essential element in any security system for Lake Monticello. A police force, which is adequate for 7,000 people, is not necessarily viable for the 10,000 plus population the community could have at full build out. To improve our present police force and to expand its capabilities to accommodate a growing future population, the following items need to be systematically addressed.

1. **Additional personnel:** To some degree we need to establish an acceptable ratio of new personnel which need to be automatically added for each 1,000 new residents who will require security services.
2. **Space:** We need permanent space to adequately house the police force's expanded future operations. (This item is separately addressed in conjunction with our administrative space initiative).
3. **Technology:** Manpower is our most costly asset. Wherever it is practical, we need to substitute equipment and technology for manpower. This is usually far less expensive in the long run.
4. **Training:** We need to continue our present program of systematic training to continually upgrade our police personnel on rapidly evolving new police techniques and equipment as the new information becomes available.
5. **Communications:** Better systems of communication are needed to tie our composite security system together and have it operate as a cohesive entity. Elements of this approach are an integral part of a future gate system and any surveillance cameras etc. should be incorporated in an overall plan to achieve improved security.

6. Education: We need to continue our excellent ongoing program designed to educate and convince our community of the overriding need for their continual cooperation and support in making any future security system work effectively.
7. Rewrite Regulations: We need better regulations. Rules that are reasonable, consistent, clear, fair, and readily enforceable are essential if our police are not to be unreasonably handicapped in carrying out their assigned duties.
8. Lighting: Additional lighting is needed to discourage vandalism in certain key areas such as; gates, main buildings, amenities, parks, playgrounds, etc.

2.9.2. WALKING, JOGGING, AND BIKING TRAILS

The main roads in Lake Monticello, particularly Jefferson Drive, are narrow by modern day standards. Walking, jogging, and biking (WJB) are very important forms of exercise needed for our residents to remain physically fit or to regain fitness once lost.

Currently the only place to do extensive WJB activities is our extensive road network. Unfortunately, cars and trucks must use this same network. After all, it was designed primarily for vehicle use not for WJB activities.

Therein lies a basic conflict of activities and a significant safety hazard. While there have been no major accidents to date, there have been numerous close calls, particularly on Jefferson with its heavy traffic and numerous dips and blind curves.

Two things need to be done to minimize these hazards:

1. We need to achieve better education of all the WJB users to reduce current dangerous practices such as: walking two or more abreast, wheeling baby carriages on main roads, walking and biking on the wrong side of the road, walking at night in dark clothing and with no lights, riding bikes in the dark without lights, etc.!
2. We need to move rapidly to provide alternative areas for such WJB activities to take place. Paths, which could be dedicated to WJB activities, would greatly increase WJB safety. LMOA needs to develop an off-the-road path system using currently available common LMOA land or by purchasing (or trading) land holdings to acquire areas for future WJB path construction. Hiking paths can be located in areas where the topography is unsuitable for buildings or other community activities. The lake property on the Rivanna River flood plain is an example.

The use of Jefferson Drive is by far the biggest problem because it is the main connecting link between most of our areas. A secure path along Jefferson would be ideal but this is the most difficult to implement due to lack of essential right of ways. Because the safety of our residents is so critical, we need to start the education process now and implement an overall path system as rapidly as possible, whenever funds and new land or right of way opportunities permit.

2.9.3. WILDLIFE CONTROL

As our community moves toward full build out, the amount of wooded acreage encompassed by Lake Monticello will become a shrinking portion of the whole. In the future, the amount of land where indigenous wild life can live and forage will rapidly decrease, while the number of animals will expand because they are safe here, i.e. not hunted. We already have problems with some species. If the experience of other similar controlled communities holds true here at the lake, these problems will become worse as increasing amounts of land are urbanized.

Deer are currently a problem in many community areas. As beautiful as they are, they present a traffic hazard at night and in the early morning hours. Further, deer can carry Lyme's disease. Cases have been reported locally and more are possible with an increase in the deer population.

Indigenous Canada geese are already a significant problem. Aside from being extremely messy, they are a proven cause of increased fecal count in the lake and on the public bathing beaches. Geese continually pollute our golf course with fecal matter.

The longer we wait to address these wild life constraint problems the more difficult it will be to bring them under control and the more socially unpalatable will be the ultimate solution. There appear to be two practical solutions to the geese. When the current court injunction is overruled, we can hire a State licensed expert to find their nests and destroy the embryo within the egg---without destroying the egg itself. When their eggs consistently do not hatch, geese will leave an area. This approach can be used on the nests around the lake and local ponds.

On the golf course, Border Collies can be used effectively. These dogs continually herd the geese. Since geese hate to be herded, they will usually leave the area. *Note:* one Border collie has already been purchased for the golf course.

On the other hand, deer will rapidly over populate in areas where there are no natural predators and where they are not hunted. Too many deer concentrated in an area can, over time, destroy a forest; since the tender tips of young trees (or new growth) are their natural diet. Most older communities, like ours, have had to resort to controlled bow hunting, by professionals, to control exploding deer populations. Trapping has proven to be prohibitively expensive. Any of these measures can be very traumatic for a community that loves nature.

2.9.4. ROAD CENTER LINES

Many community roads have many sharp turns and depressions. Jefferson –our main road—is particularly bad in this respect. This road is relatively narrow. Often, vehicles come to the crest of many of Jefferson's short but steep hills only to find they are facing another car or truck coming directly at them partially on their side of the road. Often, both of the vehicles may be somewhat in the center of the road. It is just a matter of time until Lake Monticello has a significant accident due to the lack of adequate centerline markings. Also important, there is the potential here for a lawsuit against LMOA. Consequently, centerlines need to be marked.

Since marking is expensive, it needs to be approached in a pragmatic manner. Paint centerlines only where traffic levels are relatively high and/or where there are specific problems such as

curves and dips so that all vehicles will know their relative position on the highway with respect to oncoming traffic. It is not essential that we mark the many extended straight sections where oncoming traffic can be seen a long way ahead. Not all of Jefferson needs lines but key areas do and they need them now! Action needs to be taken early, before accidents occur. The rapidly expanding number of new homes, with their attendant increase in traffic volume, will only exacerbate the problem in the future.

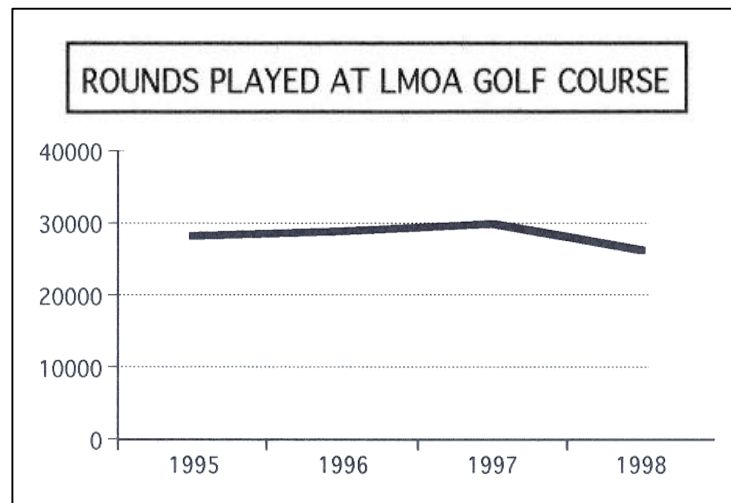
2.9.5. LINE OF SIGHT PROBLEMS

An additional road related problem is line of sight difficulties. Many intersections are to all practical purposes blind; i.e. entering vehicles can not see approaching traffic until the vehicle entering traffic is already in jeopardy. The vegetation that interferes with the drivers' vision needs to be removed immediately. While there may be right-of-way difficulties in a few cases, this should not prove to be unsolvable. Either we secure the property owners approval or make enabling changes in key Lake Monticello policies. The safety of the Lake's residents should be paramount.

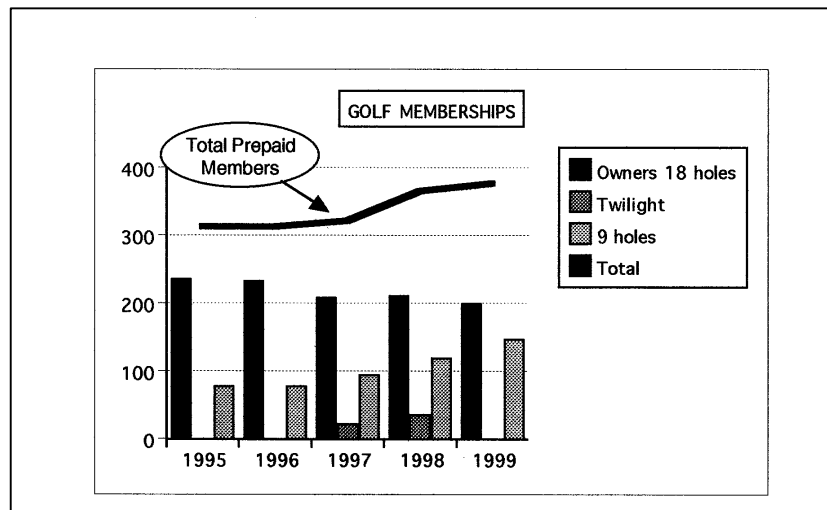
2.10. GOLF

As with the lake, golf is a foundation block of our community. The availability of the golf course has a strong impact on the property values throughout the community, not just for those who play the game.

The golf course is expected to pay its own way. Its ability to do so depends upon high usage by fee-paying players. Although the golf-playing rate is not growing as fast as the number of homes is increasing, the accompanying graph shows that the annual number of rounds played increased steadily until 1998.



The second graph shows that while annual prepaid 18 hole memberships are decreasing, the prepaid nine hole memberships are increasing, resulting in an increase in total prepaid memberships.



Upward trends are positive for the health of the golf course budget. We can only speculate about the cause of the drop in 1998, but we do know that current emphasis on improving the condition of the course should increase future utilization. Prepaid memberships provide up-front money to apply to golf expenses early in the year, and an increase in the daily rate play, with its higher average fees, will provide increases in total income.

2.10.1. GOLF MAINTENANCE

Our golf course is considered to be one of the better-designed courses in the region. At present, there is considerable dissatisfaction with the condition of the course. The Golf Committee, in conjunction with the Golf Course Superintendent and the Golf Pro has recently developed a comprehensive plan to restore the course to a desirable condition. To enable the golf course to continue to operate in the self sustaining- mode, the LMOA should endorse and support that plan.

The Golf Committee's improvement plan may show a need for additional money. To support that possible need, the LMOA should:

- a) Apply a COLA to the golf fees (See COLA in Section 1.7 of this plan).
- b) Seriously consider an increase in the daily and annual greens fees.
(See Section 3 Capital Improvements.)

The Real Estate Study found no LMOA owned property adequate for construction of an additional nine-hole golf course. Current course use does not predict the need for an additional nine holes. The Golf Committee should reexamine the potential need for additional holes annually.

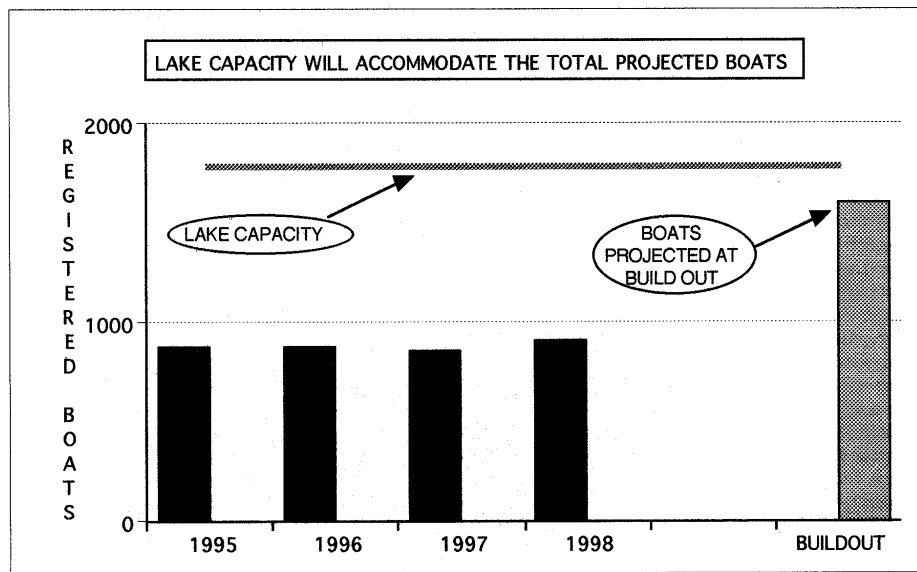
2.11. BOATING

Recreational boating is a major use of the lake. This chart describes the number of boats registered here as of 1998.

Total Number of Boats Registered

1995	1996	1997	1998
876	882	855	911

Actually the types of our boats have more impact upon our lake use than their actual numbers. Powerboats (both runabouts and pontoon boats) have the greatest impact on lake operations: while sail boats, canoes, kayaks, paddle boats, etc. have the least. Most of these vessels are actually on the water a very small percentage of the time; thereby further minimizing their impact.



The total number of boats of all types registered at Lake Monticello increases most years. Currently we have 1.5 boats registered per waterfront lot and 0.2 boats registered per inland lot. Using the current ratio of boats registered per lot, we can expect 1597 registered boats with full lot build out. That total falls within the calculated lake capacity.

At current rates of growth the number of boats should not present a future problem. Safety Patrol logs, maintained during weekends and holidays, indicate that an average of only 19 vessels are on the lake per summer weekend day. There appear to be more boats because the same boats are observed repeatedly circling the lake over and over again throughout the day.

2.11.1. BOATING REGULATIONS

However, the manner in which these vessels are operated can present significant future difficulties. If our residents (and our guests) abide by all the safety rules and regulations and if they exercise reasonable common sense, there need be few significant future boat related problems—even with an expanded number of boat registrations.

A number of significant water regulations problems need to be addressed immediately:

1. There currently is no Lake Monticello policy specifically covering the towing of tubes and other inflatables despite the rapid growth of this activity. One should be written as soon as possible!
2. A basic course on tubing and water skiing safety should be a prerequisite, requirement before a person is allowed to take part in these activities. While new rules would largely follow the current regulations governing water skiing, there are some significant differences.
3. The operators (at the controls) of the towing boat should be at least 16 years old when skier or tubers are being towed. Towing requires rapid reactions and mature judgement. Towing skiers and tubers can often prove highly dangerous. The following are just a few examples of poor practice here at the lake:
 - A. Operators often totally forget that there are other boats operating in close proximity when they circle to pick up a down skier.
 - B. Operators often drag skiers directly across the path of oncoming power boats. If the oncoming boat strikes the towline the skier will be propelled to the rear and drawn inward into the propeller of the boat being crossed.
 - C. Operators forget to turn their engines off when skiers and rafters are climbing from the water into the pickup boat. They don't seem to understand that the propeller can still be turning even though the shift control is in neutral or do they comprehend the danger of suddenly being thrown into drive or reverse if the shift control lever is bumped.
 - D. Operators continually forget that they are totally responsible for any damage done by their wake. In fact, operators, not paying attention, often swamp sail boats and canoes etc. with their wake even though these non-powered vessels have the right of way.

Violations of these well know and essential water safety measures should initially result in warnings; however, flagrant reckless boat handling should be monitored and, when warnings have failed, result in loss of lake use privileges.

LMOA must continue its current policy of prohibiting the use of Personal Water Craft on Lake Monticello. Nationwide, personal watercraft currently make up about 7% of National boat registrations but they are involved in about 33% of all country wide boating accidents—many of them fatal. These safety problems plus the ultra-high noise level PWC's generate, makes these boats an unacceptable risk for Lake Monticello.

2.12. SWIMMING BEACHES

Swimming is one of our major amenities here at Lake Monticello. It is participated in by residents of all ages. There are currently a total of 5 beaches and one swimming pool available to

our members. The main beach and the pool are protected by lifeguards during swimming season. The capacity of these swimming facilities is generally considered adequate for LMOA's current needs but will prove progressively less so as we approach full build out.

The 5 current beach areas can be readily expanded in the future to handle additional resident utilization. As our community population expands over the coming years, the most intractable problem will be providing adequate parking for the families using the various beaches. Beaches 4 and 5 are particularly limited in this respect. According to the land use survey, Beach 4 has very limited parking growth potential, while Beach 5's parking is mainly restricted by the areas' rugged topography and steep slope. Terracing and selective cut and fill could be used to improve this situation but it could prove to be excessively costly.

There are a number of current areas that need early improvement. They are:

1. Our beaches are posted with a variety of signs. The same rules should apply to each beach. We recommend that all beaches have signs which state the following:
PARENTAL SUPERVISION REQUIRED
NO ALCOHOLIC BEVERAGES OR DRUGS
NO SWIMMING AFTER DARK
NO PETS
NO BOAT LAUNCHING OR MOORING
NO FISHING IN SWIM AREA
NO REMOTE CONTROLLED GAS OR ELECTRIC TOYS IN SWIMMING AREA
DOCK ONLY IN DESIGNATED AREAS
SMOKING IN DESIGNATED AREAS ONLY
Beach 1 only –
OBEY LIFEGUARDS
PARK IN DESIGNATED SPACES
(Add to beaches #2, #3, #4, and #5 the following)
NO LIFEGUARDS ON DUTY
NO PARKING IN ROADWAY
2. There is a potential for injury to swimmers from fishing equipment such as hooks and lures that become detached from lines which have been cast into the swimming areas. Fishing should not be allowed in designated swimming areas.
3. Toy remote controlled watercraft powered by battery & gas should not be allowed in swimming areas. They represent a potential for injury to swimmers.
4. Lifeguards at Beach 1 need to be more assertive in their control of the beach areas. Too much "horseplay" can get out of control and cause injury. The beach users who don't obey the lifeguard should be required to leave the area, and be forbidden to use the amenity if they are repeat offenders. Occasional security patrols around the pool and beach during peak hours of use would help. Lifeguards should be equipped with radios to contact security; it would provide a visible deterrent and be valuable in saving time during medical emergencies.

5. Smoking should not be permitted on the beaches. Some smokers are disposing of their cigarettes by burying them in the sand.

2.13. THE SWIMMING POOL

Our swimming pool, located at the Main Clubhouse, is of cement gunnite construction. It is 5,270-sq. ft. in area and can accommodate approximately 195 people at a time. Based on the earlier Virginia Outdoor Plan, this size pool can handle 1170 people a day assuming normal daily turnover rates. The current average of the number of users per day indicates that our pool is under utilized. This amenity is partially funded through user fees.

The current pool deck needs to be patched (under way) and enlarged. This patching is a temporary solution and extensive repairs to both the pool and the deck will ultimately be required in future years. LMOA needs to plan for this future expense.

SUMMARY OF INCOME AND EXPENSE POOL OPERATION

YEAR	INCOME	EXPENSES	LOSS
1996	32,903	42,322	9,419
1997	32,850	39,076	6,226
1998	41,238	49,246	8,008

As can be seen from this chart, the pool is not self-supporting. It lost \$8,000 last year alone. LMOA should strive to have all amenities, not directly included in our dues, achieve self-supporting status. Ideally, the cost of operations should be fully funded with income from users. We recommend consideration of the establishment of a dedicated Pool Reserve fund to be used only for major repairs and yearly upkeep.

To improve the current amenity and increase its yearly income potential, we suggest giving attention to the following:

1. Improve control of access to the pool so that only fully paid members and their paid guests are admitted.
2. Lifeguards need to be more assertive in maintaining control of swimmers; presently there is too much “roughhouse” and other unsafe practices permitted. This prohibition is standard practice at all public pools.
3. Set aside special periods so those very young and older members can also enjoy the pool without fear of being knocked down or injured. Again, this is standard practice at most community pools.
4. Re-stripe the pool-associated parking lot to increase its capacity.

2.14. YOUTH SOCIAL CENTER

In the past, the option of developing a social center for the youth of our community has been advocated. In the future, as Lake Monticello experiences increasing numbers of families with youth and teenage children, LMOA will once again need to address this question. The pool, the beaches, the basketball courts, etc. have provided some teen centered activities during the

warmer months but from October to April, their activities are largely centered around their schools. There is little dedicated space for youth activities here at the Lake. It would appear useful to provide some dedicated space for youth centered meetings and perhaps some game rooms and an area for dancing.

While such amenities could probably be funded — over time — the real difficulty would be how to supervise and control such an activity. A full time monitoring operation would appear to be prohibitively expensive while volunteers have seldom proven successful over any extended period of time. The problem needs to be further studied to see if there are any new viable alternatives. The Planning Committee recommends the creation of an Ad Hoc Study Team be formed to research and report on this future item.

2.15. FISHING POND AREA

Lake Monticello’s fishing pond has for years been a substantially under utilized amenity. In order to rectify this situation, and based upon conversations with members of the Buildings and Grounds Committee, we are recommending two future additions to the Fishing Pond.

1. Add a small dock to facilitate the use of the pond by canoes and other small, light boats.
2. Start the development of a new swimming beach at the pond. The new swimming area would be roped off with floats to protect the swimmers.

Swimming and boating facilities would be well separated to prevent any conflict in activities.

Unlike our other beach areas, this area has enough space for parking to support both new functions. However, there is a complication. Covenants in the deed to the fishing lake property greatly restrict its’ use for recreational purposes; consequently, we will have to obtain changes to these covenants in order to carry out these improvements.

2.16. CAMPGROUND

The LMOA Campground was established to serve as a temporary place for lot owners to stay while they were planning for or waiting to build. It also served as a campground for guests, non-resident owners and a small portion of the general public. The declining usage and continual losses shown below indicate that the campground has outlived its usefulness to LMOA membership. A more beneficial use needs to be determined and implemented.

YEAR	INCOME	EXPENSES	DEBT
1994	14759	24949	10190
1995	14006	22339	8333
1996	16455	24401	7946
1997	14776	23174	8398
1998	15571	20829	5259

The campground comprises 11.4 acres. It has water, sewage and electrical service. It is surrounded on three sides by 34.6 acres of Fluvanna County owned property, which the county has indicated is a potential elementary school site. Recent contact with County School Superintendent Wayne White verifies that he still favors it as a future elementary school site. The 1999 Fluvanna County Capital Improvements Plan, adopted by the Board of Supervisors at its January 1999 meeting, includes \$8,000,000 for a new elementary school in 2003-2004. Prior to the 2003-2004 date, the School Board may consider this site for the placement of temporary buildings for a Special Education center and a parking lot for school buses. The parking lot could be made large enough for a “park and ride” point for the LMOA area.

The superintendent visualizes a 400-student elementary school. The school, with a soccer field, a softball field and an elementary gymnasium, will probably require the combined campground and county acreage. In addition to providing nearby schooling for LMOA children, the school would be available to the LMOA community for recreational and meeting purposes. It could help offset LMOA desires for more athletic facilities for its residents without acquiring and developing other sites within or without current LMOA boundaries.

This money losing campground activity should be closed on an orderly schedule. The strategy must include notification to campground users. Negotiations should begin immediately with Fluvanna County Officials with the objective of selling or trading the campground property to the county. If this approach is not successful, the property should be offered for sale to the public.

2.17. ATHLETIC FACILITIES AND PARKS

Soccer and football fields: The spoils containment area North of the fishing lake is a level area of approximately 200 feet by 500 feet. It may be soft for some time as the lake dredging silt settles. It should be leveled and planted in turf grass now so that it can be developed into a combined football and soccer field. If additional spoils dumping is necessary on this site in later years, the cycle of dumping, planting and football/soccer field could be repeated.

Basketball and Volleyball Courts: The Real Estate Study shows that LMOA presently owns four lots that became association property through settlement of debts of the prior owners. Three of the lots are physically suitable sites for basketball or volleyball courts. A Social and Recreation Committee action is needed to determine whether the courts should be created. If not, all three lots should be used for sale or trade. Lots that become LMOA assets in the future should be considered in the same manner.

Note: Early action should be taken to consider moving the basketball courts—presently located across from the Main Clubhouse—to a new location which is far less conducive to the current level of vandalism and disruption to key major LMOA facilities. The locations listed in the Real Estate study are potential sites for this move.

Tennis Courts: We have 8 tennis courts at Lake Monticello; 6 at the Main Clubhouse and 2 at the Lafayette Recreation area. Although there has been a recent small increase in the overall number of players, our current capacity vastly exceeds any projected need. This should hold true even

after full build out. In the future, should there be any unanticipated need for increased capacity, expanding the actual court time available by adding additional lighting can accommodate it.

Parks: The stables area offers a wooded and park like setting for playgrounds and athletic fields. Approximately 6.7 acres of its 15 acres are comparatively level and unoccupied. Included in this 6.7 acres is a level area of about 300 feet by 500 feet. With tree removal and some grading, this site could provide the 240 feet by 480 feet area of a typical softball field. The remaining four comparatively level acres should be developed as playground. This plan leaves approximately seven acres of undeveloped rustic area to complete a park like setting. A culvert and some fill will be needed behind the maintenance building to enable a road from Jefferson Drive to the park area. If the stables area is not developed for boat storage, action should begin immediately to fund, design, develop and maintain a park in the stables area.

Green Space: In excess of 15 LMOA owned parcels, which comprise over 200 acres of green space, are not suitable for development and should be retained as LMOA natural areas for hiking, picnicking, swimming and fishing. These parcels are described in the Real Estate Study. We find no evidence that the majority of LMOA members know that some of the larger parcels belong to LMOA. Action is needed to inform the membership of the availability and location of the parcels, and to clear and mark hiking trails.

2.18. BOARD OF DIRECTORS AND COMMITTEE FACILITY

The LMOA Board of Directors conducts executive sessions in a storeroom in a downstairs corner of the Main Clubhouse building. The committee chairpersons conduct their meetings in randomly available spaces. None of these locations are conducive to effective business meetings.

An efficient conference room for executive and business meetings needs to be clean, lighted and lockable. As a minimum, it should be equipped with:

- a) Projection and screen equipment for viewing transparencies.
- b) A chalkboard or similar wall mounted fixture.
- c) A large, current map of LMOA's area.
- d) A wall mounted LMOA organizational chart.
- e) A telephone extension from the administrative office.
- f) A conference table and chairs for 12 participants.

We recommend that the BOD begin action now to prepare and equip a room as described above. Its primary use should be for BOD meetings. Its secondary use should be for meetings conducted by committee chairpersons.

2.19. ALTERNATE ACCESS GATE

Traffic measurements indicate that the Tufton Gate is heavily utilized during the hours that residents leave for work in the mornings and return in the evenings. The left turn entry from State Route 53 to the Tufton Gate is in a short sight range area without a left turn or through traffic lane. Some minor accidents have occurred as a result. The Safety and Security Committee is concerned that more serious accidents are inevitable. Contacts with the Virginia Department of

Transportation indicate that VDOT is sympathetic, but does not see the need for VDOT action to alleviate the concerns.

In early 1998, Safety and Security recommended movement of the gate to a safer location. In March 1999, the Ad Hoc Real Estate Study Team made a supporting recommendation. Neither recommendation has resulted in formal LMOA action.

The Tufton gate issue is another complex topic that cuts across committee lines. Action is needed now to study this issue in detail and develop a plan to resolve it. The subject is not clearly within the charter of an existing LMOA committee. The importance warrants action by an Ad Hoc committee appointed by the Board of Directors. The Ad Hoc Committee should include representation from the Buildings and Grounds Committee, the Safety and Security Committee and the Planning Committee.

2.20. FISHING

Over the years, LMOA has not invested a lot of funds in improving the quality of fishing in the main lake. Most recent improvements have come as the direct result of the efforts of the Bassmaster's Fishing Club working with a small amount of money provided each year by the Lake Preservation Committee. Over the past few years, this club has effectively used these funds to stock bait fish to improve the amount of natural food available to feed the bass. The club has also been active in sinking used Christmas trees in deep water areas each Winter to provide structure for the bass and hiding places for small bait fish. LMOA should continue to support these combined Committee and club environmental improvement efforts and should also consider funding an additional small stocking effort to selectively increase the number of other species in the lake, e.g. sunfish, crappie, etc.

Section 3 Capital Improvements

3.1. ADMINISTRATIVE OFFICE SPACE

Analytical work to date has demonstrated that LMOA currently needs additional office space and that the space situation will worsen as the number of Lake Monticello residents increases steadily over time. In April, the BOD – acting on a recommendation by the Planning Committee – approved the rental of local commercial office space as a expedient but interim solution to LMOA’s most obvious and immediate problems of administrative crowding.

Observation of the office force’s visible response with improvements in efficiency, effectiveness and personnel morale (which have already occurred as a direct result of providing a minimum of additional space) have reaffirmed the need for acquiring more space but on a permanent basis. Analysis has now been undertaken to further define any additional current space required to obtain maximum efficiency and to the extent possible predict those additional needs that will result from LMOA’s projected growth over the next 10 to 15 years.

The planning function has neither the resources nor the charter to design a new building. What this plan will do is to analyze the need, confirm the requirements, recommend the best location and then further define the most efficient and effective characteristics, which will dictate overall configuration of the required facility. An actual detailed design would require an architectural engineering study.

Review of the requirements definition, when married with the ad hoc Land Needs Study, has confirmed that the best location for additional space (from a land availability stand point) would be to expand the Main Clubhouse administrative area to the South of the main building. The land survey confirms the availability of the required building space and of adequate room for parking close at hand. At the same time, this location also offers the best mix of necessary work place efficiency advantages such as: the proximity to other inter-related administrative functions, the common use of many facilities, a location next to key management personnel and the best potential for overall cost minimization.

There are two options.

1. Expand the current building using the current south wall as a common element of both the new and the old construction.
2. Separate the two buildings and connect them with a roofed passageway.

After architectural review, this second approach might, by necessity, be recommended. This would keep us from having to possibly make expensive renovations to the old building in order to bring it into compliance with changes to the building codes which have occurred during the long period since the old facility was constructed.

Our analysis indicates that both the most logical and cost effective configuration would be a two-floor structure similar to the Main Clubhouse with the lowest floor being a walkout basement. The main floor would be mainly used for administrative operations and services; while the lower

floor would be largely dedicated to police operations and security services. Each floor would encompass approximately 2200 sq. ft., for a total of 4400 sq. ft.

3.1.1. ADMINISTRATIVE FACILITY

The administrative floor would be oriented around a central core of five common service functions:

1. A food service area — coffee, refrigerator, soda machine, microwave, etc.
2. An office machine area — copiers, printers, mailers, fax equip etc.
3. A large conference room — capable of holding 25+ personnel at one time.
4. Men's & Woman's restrooms.
5. Administrative File Space (storage).

Around this central core will be located two or three completely closed offices (only where privacy is essential) along with a main area of open space for subsequent use with a high quality modular wall and furniture system. This concept is designed to maintain maximum flexibility for accommodating future changes in both functions and organization.

The large central conference room will be shared with security and will have two separate doors. One will permit the room to be used after hours by committees, etc. but at the same time, allowing the administration area to be secured from possible entry from the conference room after work hours.

Between the new administrative facility (the addition) and the old administration spaces in the Main Clubhouse 420 cu. ft. of file storage must be provided for current use files; while 150 cu. ft. for occasional use files will be provided in the basement of the Main Clubhouse building. An additional 500 cu. ft. of archival files can and should be stored at a remote site.

LMOA should move immediately to put the bulk of these files into an electronic file system. The advent of modern word processing equipment and high quality scanners makes this approach practical. This conversion over time can be done either by the staff or under contract – whichever proves to be most efficient and cost effective.

3.1.2. POLICE & SECURITY FACILITY

The lower floor, containing approximately 2200 sq. ft., will be largely reserved for police and security functions. It will contain adequate space for the following:

Administrative offices

1. Secure storage for evidence material
2. Storage for departmental equipment
3. Room for crime scene processing
4. Dual interview rooms
5. Room for lockers, bathrooms & showers
6. Room for a dispatch center and receptionist area

A large meeting room and restrooms for visitor use will be located upstairs and will be shared with Administrative personal to reduce overall building costs.

The lower floor will be designed with separate entrances to the outside so that the space can be restricted (when needed) to only police, security personnel, and their clientele.

3.2. THE MAIN CLUBHOUSE

The present Clubhouse was designed primarily as a series of food serving and more formal dining areas combined with some large rooms built for social functions and which provided, at the same time, some ultra- large common meeting rooms. In addition, the South portion of the building is largely dedicated to offices, machine rooms and other rooms for administrative functions.

Unfortunately these rooms are not well adapted for use as meeting rooms. The Terrace Room (the main downstairs room) was designed to accommodate very large gatherings and while we occasionally have these large sessions, we usually need a larger number of smaller meeting rooms — to accommodate groups of under 25 persons.

Fortunately, this problem lends itself to a rather straightforward solution. The installation of up to three modern, compact, well insulated sliding (or accordion) door systems would allow management to readily tailor this space to the Lake member' s specific daily meeting room needs. For example with this system we could set up 1 very large room, 2 large rooms, 1 large room and 2 small rooms, or 4 small rooms; what ever that particular days space requirements dictated.

While high quality modular partition systems are not cheap, they are inexpensive when compared to the alternate cost of new separate meeting room construction. To a somewhat lessor extent, the Falconer room could also be subdivided in a like manner. If both rooms were modified, it would provide great flexibility and greatly expanded capacity for accommodating many concurrent meetings.

3.2.1. EXPANDED DINING ROOM

The main dining room area may be too small to properly accommodate very large functions. While this space problem occasionally is the case, it is very much the exception rather than the rule. When one examines our past dining room usage, this data would argue strongly against pouring significant additional funds into what has historically been a money losing operation.

Nevertheless, there are practical ways to expand the current dining room area without excessive costs. The current porch attached to the main dining room is seldom used. This porch could be rather easily enclosed. The porch is solid, being supported by brick pillars and large steel beams. The floor, the roof and the ceiling, and one of the 4 side walls needed to house this expansion are already in place. The addition of three outside walls, mainly made up of windows, would be all that would be required to fully enclose this area.

The 3 large sliding glass doors, needed to provide entry and exit from the main dining room floor, are already in place. In addition, if parquet wood flooring blocks were used instead of carpeting, this area would provide an additional (alternative) dance floor area when this is required for large dances, weddings, parties, etc. This newly created room could easily be closed off to accommodate a separate activity, meal, meeting, etc. without interfering with activities going on in the main dining room. The view from this new glassed in area would be exceptional. A contractor has roughly estimated the cost of this addition at between \$ 14,000 and \$ 17,000.

3.2.2. UPSTAIRS BAR

Food Service has also expressed a desire for an upstairs bar. This could be achieved, in a like manner, by erecting a modular Patio enclosure on the deck just outside the dining room dance floor. These units are readily available, pre- manufactured, very attractive and could be purchased and erected for an estimated \$12,000 to \$13,000.

3.3. ROADS AND DRAINAGE

A 1998 physical inspection of each of the 335 LMOA drainage culverts, plus inspection of the 202 streets that make up our 60 miles of LMOA roadways confirmed serious deficiencies:

- a) Approximately 94% of the culvert pipes need to be replaced because they are rusted, collapsed and undersized for the calculated run-off.
- b) Our most heavily traveled street, Jefferson Drive, has extensive and accelerating pavement deterioration. Approximately 35 % of the roadway has failed due to lack of uniform thickness resulting from poor quality original construction. Heavy truck traffic has caused additional cracking which is aggravated by water infiltration and freezing.
- c) The remainder of our roadways is predominately of chip seal construction. They are rapidly deteriorating due to irregular maintenance and heavy truck traffic. Over 5.5 miles of these roadways need complete reconstruction. Another 36 miles of road do not have crowns or adequate drainage to eliminate standing water and erosion of the surfaces.

The physical inspection that developed the above data was conducted under the auspices of the Buildings and Ground Committee. The inspection and the resulting corrective action study was led by a registered civil engineer with extensive road and infrastructure experience. The study concluded that:

- a) Jefferson Drive should have all culverts replaced with state of the art plastic culverts and the roadway should be reconstructed using the “Pulverizing and Reclaiming” technique. This method saves on material cost. It provides a strong surface and can be accomplished in much less elapsed time than older reconstruction.
- b) The 5.5 miles and the 36 miles of roadway discussed in paragraph “c” above can best and most economically be corrected by placing an asphalt leveling course and surface overlay upon them.
- c) All remaining defective culverts should be replaced with the plastic culverts.
- d) Drainage ditches and road shoulders should be repaired as the other work is accomplished.
- e) Empty conduit pipes should be placed under the roadways at strategic locations as road repairs are accomplished. These pipes can later be used for communications cables or other wires that may need to go under the roads.

The 1998 estimated cost of the above work is \$5.8 million. Planning is presently underway and must be completed to fund, schedule and accomplish these roadway repairs. Completion of the work within the seven years proposed in the Buildings and Grounds Plan will halt the rapid deterioration that is continuing today.

Roadway maintenance must continue to receive the highest priority in LMOA's short and long range plans. LMOA roadways must be improved and maintained for the use of the members and to uphold property values. The long-range portion must include an adequately funded, systematic annual roads and drainage maintenance program to preclude future roadway failures of this scope. This maintenance program must be continually included among LMOA's highest priorities.

Roads and drainage should not be considered in a vacuum. It needs to be coordinated with another related factor—run off control. (See Run-Off Control in Section 2.5.)

3.4. SECOND POOL REQUIREMENT

Whether there is a need for a second pool depends on the type of pool. Review of the records covering the use of the current pool, an outdoor facility at the Main Clubhouse, shows that it is under utilized. The current utilization rate may change as we move closer to full build out but for the next 5 years the need for another outdoor pool --- used only three months a year --- has not been convincingly demonstrated.

On the other hand research, informal surveys and unsolicited comments received from many Lake residents seem to verify that there is a significant need for a year round swimming facility.

Research accomplished to date indicates that building an enclosed, heated pool could reasonably be considered using funds currently set aside for a second pool. A rough cost estimate, made by a pool contractor, indicates that a pool large enough to allow up to 40 people to concurrently swim laps and or do aquatic aerobic exercises would have to be at least 60 by 35 feet. A 5-ft. brick or tile deck would surround it. Such a pool alone would cost on the order of \$ 35,000 with another \$32,000 for heating and air conditioning. Added to this would be approximately \$185,000 for a building to enclose the pool and other essential facilities such as locker rooms,, toilets, showers, ticket counter etc. for a total of approximately \$247,000. Note: Going to gunnite construction or increasing the size of the pool will, of course, increase the cost of construction.

An exercise room, aerobic exercise room, a game room and administrative spaces would increase the estimate to over \$300,100. To this must be added the cost of the land -- if we don't already own it. It is logical to assume that overall cost savings could be achieved if these same facilities were also used for other purposes. This, in fact, is what the Planning Committee is recommending. See Multi- Purpose Recreational Facility below.

3.5. A MULTI-PURPOSE RECREATION FACILITY

The Planning Committee strongly recommends the development of a Multi- Purpose Recreational Facility that will include among other activities, a year round (indoor) swimming facility. Exercise and game rooms are also potential inclusions. If this proposed facility were located on the 2.8-acre lot as we recommend, it would provide the following key advantages:

1. As a true swimming facility, an indoor pool will qualify for using money from the swimming pool fund to purchase the land necessary for that purpose.
2. This recommended approach would permit LMOA to purchase a unique property-- while it is available--and perhaps eliminate some potential easement complications.
3. Due to the property's close proximity to the golf course, this approach would also permit the later incorporation, within the Multi-Purpose Recreational Facility, of many golf-related facilities and support needs such as rest rooms, showers, locker rooms etc. This is assuming that these items are proven necessary in the final report of the engineering survey of the current Golf Clubhouse.
4. A Multi-Purpose Recreational Facility would maximize the overall utility of a rather expensive piece of property and subsequent indoor pool construction and it can concurrently serve the combined broad recreation and exercise needs of a broad spectrum of Lake Monticello residents such as:
 - A. Therapeutic exercise for many members who must now go to Charlottesville to accomplish this activity.
 - B. Year round training for our lake swim teams.
 - C. Health training activates in the evening for working members who need to improve their overall fitness.
 - D. After school activates for our youth.
 - E. Swimming classes.
 - F. Improved facility support to golfers.

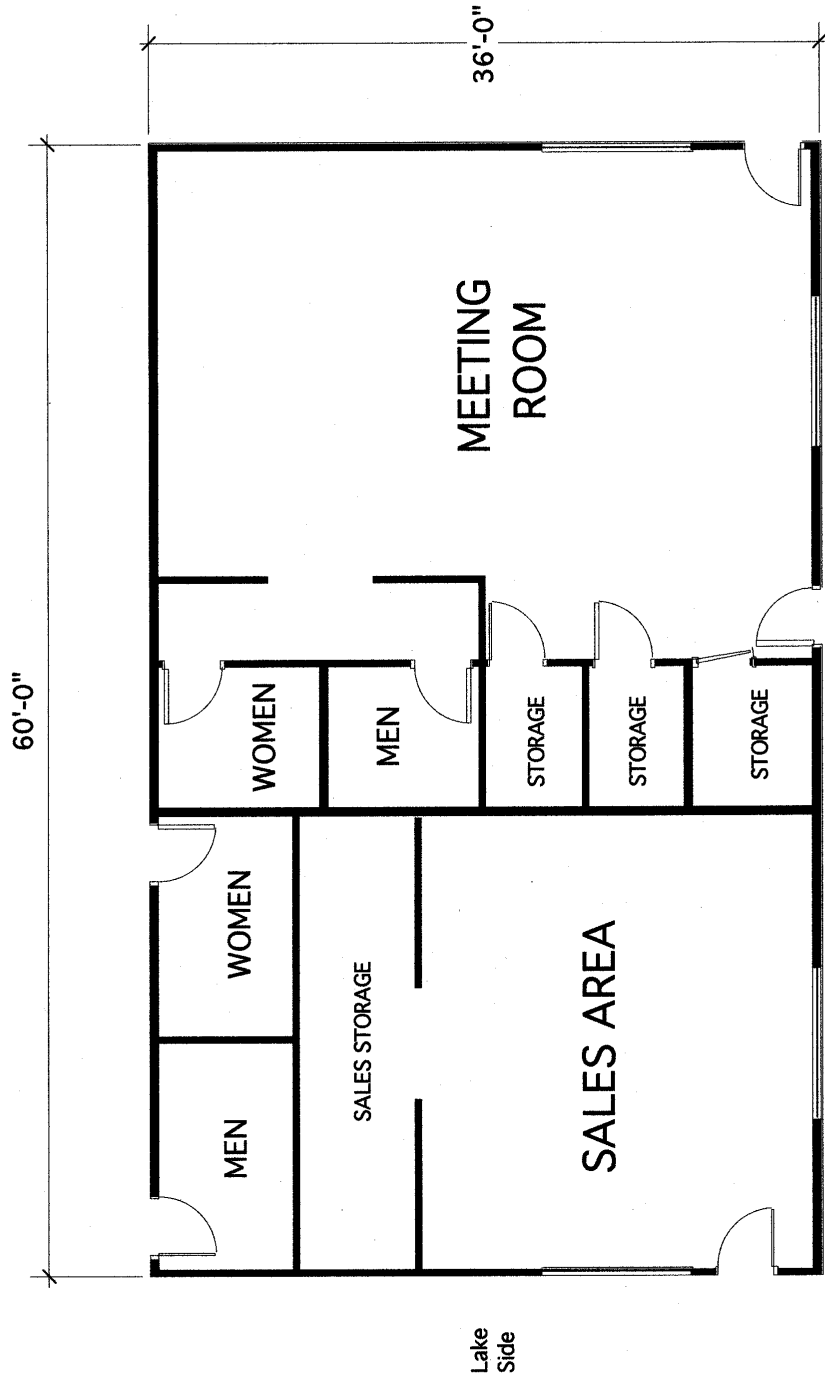
Any Multiple use Facility should be self-supporting and pay for its own cost of operations.

3.6. MARINA

The functions and location of the existing Marina will not change. Improvements to the Marina Building, and boat storage and parking areas, are recommended to improve the appearance of the area, and to add use and value to the amenity.

Improvements include renovating and dividing the Marina Building. The building, which was originally a fire and rescue facility, is structurally sound. The recommended renovation includes:

- 1) Enclosing the three 12 foot high garage doors with a solid wall.
- 2) Insulating plus adding a suspended ceiling and wallboard inside.
- 3) Adding vinyl siding outside to improve appearance.
- 4) Dividing the interior into men's/women's toilets, functional areas for retail sales, storage areas and a meeting room to be available to boaters and non- boaters alike.



MARINA RENOVATION

EXHIBIT NO. 1

Scale: 1/8" = 1'-0"

3.6.1 BOAT TRAILER & VEHICLE PARKING

Expand boat trailer parking in front of the building by removing a limited number of trees, graveling the area and marking parking spots in an organized layout. Gravel the boat trailer parking area across Jefferson Drive and mark the parking spots in an organized layout. The Buildings and Grounds Committee is actively working these parking improvements.

3.7. REFER TO REAL ESTATE STUDY

3.8. BOAT SLIPS AND RAMPS

Existing boat slips at the Marina and at Beach 4 need refurbishment and design improvements. The Director of Maintenance and Buildings and Grounds Committee are currently working these improvements. Their efforts should be supported.

The demand for boat slips far exceeds the number of slips available. The waiting time for powerboat slips is 2-3 years and it is 8-9 years for pontoon boats. The situation will continue to worsen as the boating population increases toward full lot build out. The demand can be partially satisfied by converting beach 4 into a second docking area. This step will require the presently underutilized swimming area to be closed and floating boat slips installed. Since very little land is available for parking of boat trailers at Beach 4, it will be impractical for use by boaters who need to launch and recover their boat each time they use it. This docking area could, however, accommodate up to 50 boaters who rent slips on a long-term basis.

The boat launching ramps at the marina also creates a backlog. Providing additional launching ramps at other LMOA owned property appears to be impossible due to the lack of available space for boat trailer parking. Adding a boat-launching ramp at the Marina will require a reduction in the number of available boat slips; it is not recommended.

3.9. BROADCAST COMMUNICATIONS

Lake Monticello has an excellent TV communications system. It is one of our major methods of rapidly disseminating important information to our residents. It is also a critical asset in providing early warning to our members in the case of any natural disasters such as windstorms, blizzards, and floods.

As good as it is, both inadequate space and electrical current limit the current broadcasting facility. Its electrical capacity is presently marginal and needs to be fixed now. The facility also needs between 150 & 200 sq. ft. of additional floor space over the next few years. Their space problem could best be addressed as a part of our recommended Administrative and Police space needs package. It might be co-located with a future centralized Lake Monticello Control Center.

3.10. GATE SYSTEM

Effective entrance gates are fundamental to our Lake Monticello security system for controlling access to our community and its many amenities. Unfortunately, the current gates are no longer

adequate to this task. Our gate system has been in use for two decades and it now exhibits significant problems:

1. The mechanical portion of the system is worn out from heavy use and abuse.
2. The overall control system is becoming unreliable; sometimes the entry cards work, sometimes they don't.
3. The gates and their attendant control system represent very old technology.
4. The current gates are far too easily compromised. Near future replacement or upgrading of our present gates is only one aspect essential to maintaining and improving our overall security strategy.

Initially, we need to ascertain all of the major weaknesses of our total contemporary security system and incorporate new approaches to improving our overall community security posture, not just gates. We need to rethink our entire approach to controlled access. For example, we should concurrently address the following items:

1. Find better ways that identify and apprehend gate entry violators.*
2. Use methods that provide proof that the violations occurred and identify the perpetrator.*
3. Improve our enforcement policies so that we have appropriate penalties for flagrant violations.

Note: This may require our actively pushing for changes to, or special exemptions from, existing laws.

4. Improve the education of - and communications with - our residents as to the deleterious impacts of security violations upon both our quality of life and ultimately upon our future property values.*
6. Perpetuate the understanding that manned gates are extremely expensive and, therefore, we continually need to seek alternative approaches that will prove to be less manpower intensive.*
7. Determine if we will need to open additional gates in the future. If so where, how and when.

Note: The Safety & Security Committee strongly recommends against additional gates.*

8. Determine how we can obtain better control over vendor / contractor access to our community.*
9. Determine how we can get improved control over the total number of gate passes currently in circulation and the development of an accurate and up to date database which will automatically be kept current.*
10. Provide improved command and control of our gates along with some form of essential advanced technology communication capability.*
11. Develop a system for determining when a guest has actually left the lake area and therefore is no longer the responsibility of their initial resident host.*

Unfortunately, modern gate access technology tends to be both complex and expensive, mainly due to the need for extensive computer support and for some type of dedicated advanced technology communications network, as well as staff training. While such a system could cost on the order of \$200,000 to \$250,000, this could be amortized over an extended period of time.

On the positive side, such a system approach could possibly obviate the need for any future manned gates and over a few years the savings on fully loaded manpower costs could quickly offset the high initial cost of a fully integrated access system. Remember, the cost of manpower

goes up each year! In addition, such a communication system would also provide a critical security element useful in protecting a large boat and recreational vehicle parking area, playgrounds, tennis courts, beaches, etc.

However, before proceeding in this direction, we should first examine all possible ways of finding a commercial provider such as phone lines for this advanced technology system capability. This point is particularly important when pending road construction and the cost of future maintenance is considered.

Note: Items marked with an asterisk (*) are currently being addressed by the Safety and Security Committee; this may lead to a solution in the near future.

3.11. GOLF RELATED CAPITAL IMPROVEMENTS

Prepaid memberships provide up-front money to apply to golf expenses early in the year, and an increase in the daily rate play, with its higher average fees, will provide increases in total income.

Our golf course is considered to be one of the better-designed courses in the region. At present, there is considerable dissatisfaction with the condition of the course. The Golf Committee, in conjunction with the Golf Course Superintendent and the Golf Pro has recently developed a comprehensive plan to restore the course to a desirable condition. To enable the golf course to continue to operate in the self sustaining- mode, the LMOA should endorse and support that plan.

The Golf Committee's improvement plan may show a need for additional money. To support that possible need, the LMOA should:

- c) Apply a COLA to the golf fees (See COLA in the Financial Section of this plan).
- d) Seriously consider an increase in the daily and annual greens fees.

3.11.1. GOLF CLUBHOUSE

General maintenance of our golf clubhouse needs to be dramatically improved and brought up to the same good standards as the Main Clubhouse. This needs to be carried out on a continuous basis. Problems range from poor daily housekeeping to extensive mechanical repairs to the building and its utilities. This inadequate, and often improper, maintenance activity has occurred over an extended period of time. Extensive work is required to bring plumbing and electrical systems up to prescribed standards. Rugs need replacement and proper periodic cleaning once they are in place. Interior and exterior painting, staining, and caulking etc. are badly needed throughout the facility. Deck posts need to be replaced and termite shields used where necessary. Holes in the siding need to be patched.

That extensive work is needed is not in question. What isn't objectively known is how extensive are these much needed repairs and how much will they cost to complete in order to bring the facility up to acceptable standards.

What was badly needed was a detailed engineering study in order to professionally and objectively defines what must be replaced, repaired, and/or remodeled. This analysis will aid in the practical determination of what is essential to provide adequate and safe operations in a sound comfortable facility. This study has now been completed. Now, a task force needs to be formed to analyze the data, draw conclusions and make recommendations.

3.11.2. FOOD SERVICE AREA

Many of the food service problems are related to the same maintenance and house keeping problems discussed above. Much of the problem revolves around difficulties imposed by lack of adequate electrical voltage and current and those resulting from plumbing shortfalls. The previously mentioned engineering study will provide the facts and costs needed to make intelligent recommendations on this area.

3.11.3. GOLF PARKING

There are occasional periods when parking space at the golf course has been over- taxed but only when LMOA has had major events that include a large influx of outsiders.

It is neither practical, nor cost effective, to design and implement parking for such occasional, unique events. On the other hand, the present parking could be substantially improved, without undue cost, by the enactment of the following remedial actions.

Fill in and level the present overflow parking lot. Remove a few trees and then line the parking spaces to optimize the load the current parking area can support. Currently only about 70% of the available space is utilized due to lack of parking lot discipline

Stripe/paint the main lot with a better layout.

When we have large outside attendance at golf events, we should use the surrounding roads for parking and run a van shuttle for those guests who need transportation.

3.12. BOAT AND VEHICLE STORAGE

LMOA members' boats and boat trailers are commonly stored either in the vicinity of the marina or on the members' property. Other vehicles, primarily recreational vehicles, are commonly stored on the members' property. While these practices are not prohibited by LMOA policies, they result in storage scenes that many members consider unsightly and degrading to the overall value of LMOA members' property.

The only LMOA public boat and trailer storage sites are the parking lot of the marina and the LMOA property across Jefferson Drive from the marina. The use of the property across Jefferson Drive is of questionable authority since it is not officially designated for boat storage. Even with use of that area, the boat and trailer population exceeds the available storage space, and demand is growing.

There is no nearby public storage site, and LMOA provides no viable storage site for recreational vehicles (RVs). The LMOA policy states that recreational vehicles "... stored on improved lots be located in an inconspicuous place, if lot configuration permits". This policy is so loosely worded that it enables a member to store a vehicle in a location or manner that is unsightly to

neighbors and other members. Large RVs should be subjected to the same restrictions as trucks and buses.

A central, organized storage site for both boats and recreational vehicles could alleviate both the shortage of storage space and the concerns over unsightly storage. Placing such a site in the stables area was considered in 1997. The cost of that facility, as designed, was excessive and the site was not constructed. Some questions have surfaced concerning whether the facility was greatly over designed, resulting in a higher than necessary price. There has been no further detailed study of the design.

A final resolution of the storage issue must:

- a. Satisfy boat and vehicle owners' concerns for security of their equipment.
- b. Provide adequate space and reasonable access for all potential users.
- c. Meet achievable initial and recurring costs.
- e. Improve the overall community esthetics.
- f. Provide confidence that equipment owners will use the storage site.

Action is needed now to study the issue in detail and develop a plan to resolve it. The subject is not clearly within the charter of any existing LMOA committee. The complexity and importance of the subject warrants action by an Ad Hoc committee appointed by the Board of Directors. The Ad Hoc Committee should include representation from the Buildings and Grounds Committee, the Safety and Security Committee, the Social and Recreation Committee and the Planning Committee.

COST ESTIMATES

<u>Project</u>	<u>Dollars</u>	<u>Source</u>
Administrative & Police Bldg.	440,000	Cost/ Sq. Ft.
Alternative Tufton Gate	55,000	Staff
Bar Addition	14,000	Literature
Baseball & Soccer Field	25,000	Prior Est.
Basketball Court Move	50,000	Staff
Boat & Vehicle Storage	2,000 per slot	Staff
BOD Facility	2,000	Staff
Broadcast Communications	8,000	Staff
Camp Grounds	+180,000 (gain)	Real Estate Study
Dredging (year 2,005)	200,000	Prior Contract Cost
Expanded Dining Area	17,000	Contractor
Fishing Lake--Dock & Beach	20,000	Prior Est.
Gate System	250,000	Comparable System
Golf Clubhouse & Parking	45,000	Eng. Study
Golf Course	60,000 (2 yr.)	Golf Committee
Marina Parking	20,000	Staff
Marina Renovation	60,000	Contractor
Multi-Use Recreation Facility	400,000 (plus land)	Contractor Data
Partitions	12,000 (3)	Literature
Roads & Drainage	\$5,800, 000	Eng. Study
Security Lighting	3,000	Staff
Youth Social Center	TBD	N/A
Total Estimated Cost of Master Plan items in 1999 Dollars.		= \$7,483,000
		- 180,000 (gain)
		\$7,303,000

ACKNOWLEDGEMENTS

The Planning Committee wishes to thank the many committees, staff personnel and individuals who contributed to and assisted with the formulation of this document.

The Planning Committee currently consists of:

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Norma Hutner
Robert Kaminski
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APPENDIX

BOAT REGISTRATION DATA

The number of boats registered at Lake Monticello increases most years. The total number of boats registered, along with the type of boat, (Pontoon, Powerboat, Canoe etc.), and the location of the boat owner's lot all play a part in determining the future needs of the boating community. The following charts provide examples of these numbers.

Percentage of Boats by Lot Location

Type Boat	Inland Lot	Waterfront Lot	Percent Total
Canoe	46%	54%	18%
Inboard/Outboard	57%	43%	11%
Jon Rowboat	62%	38%	9%
Outboard	75%	25%	24%
Paddleboat	15%	85%	8%
Pontoon	28%	72%	25%
Sailboat/	45%	55%	5%
Windsurfer	--	--	--

Knowing the number of boats owned per improved lot provides a method of predicting how many boats will be using the lake as additional lots are developed. The following chart provides this information.

Total number of lots	4604
Total number of waterfront lots	520
Total number of waterfront lots developed as of 10/98	372
Total Number inland lots	4084
Total Number inland lots developed as of 10/98	2262

Number Of Boats Registered Upon Development Of All Lots

1. Based on current registration statistics each waterfront lot will have 1.5 boats registered per lot for a total of 780 Boats.
2. Inland lots, have a ratio of 1 boat per 5 lots for a total of 817 boats.
3. Assuming that all lots are improved, the total projected boats registered will be 1597, a 43 percent increase over the number of boats registered in 1998.

LAKE CAPACITY

Most boating activities take place during late spring and summer weekends and holidays. The Coast Guard Auxiliary along with lake volunteers currently provides a Safety Patrol of the lake during these times. Their logs, provide a count of the average and the maximum number of boats operated on the lake during these times. Based on the present usage patterns and projected boat registrations, the lake should be able to accommodate all boats through full build out.

MARINA

The current functions and the location of the existing Marina will not change. Improvements to the existing Marina Building and boat storage/parking areas are recommended to improve the appearance of the area, and expand use and add value to the amenity. Improvements to the following areas are proposed.

1. Renovate and remodel the Marina Building to support marina sales and provide an additional meeting room.
2. Remove an absolute minimum number of trees and grade the area in front of the marina building. Definitively mark the parking spaces for bats and trailers, to maximize the number of vehicles accommodated.
3. Re-grade the area across Jefferson Drive and delineate parking spaces for long-term boat storage.

MARINA BUILDING DETAIL

The existing Marina Building is a steel framed metal covered building enclosing 2160 square feet with three 12 foot high garage doors on one side. Men and Women's toilet facilities are accessible from the outside of the building. Prior to its present use the building served as a Fire/Rescue building and is configured for that purpose.

Renovation of the Marina Building will divide the building into functional areas for retail sales, a large meeting room for general use, and storage areas for equipment and supplies for water related activities. Additional Men and Women's toilet facilities accessible from the interior of the building are included. (See Exhibit 1).

As part of the renovation the three garage doors will be removed along with the exterior walls. The metal trusses and the existing roof will remain. Exterior and interior walls will have wood studs installed as required for structural integrity and portioning. All exterior walls and the existing roof will be insulated to increase the efficiency of the heating and cooling system. A suspended ceiling will be installed at a height of 9 or 10 feet. All interior walls will be covered with sheetrock. Exterior walls will have Vinyl Siding installed over suitable sheathing material. An air conditioning system capable of heating and cooling the retail sales area and the meeting room will be installed. Temperature in each area will be controlled separately. The total cost of this remodeling is estimated to be \$60,000.

BOAT TRAILER PARKING AREA

The area between the front of the Marina Building and Jefferson Drive will be improved to provide more efficient parking for both cars with boat trailers and the cars of boat slip renters. This will be accomplished by selective removal of a minimum number of Pine trees in front of the Marina Building and by grading and application of gravel to the area. Parking spaces within this area will be delineated with treated lumber.

LONG TERM BOAT STORAGE AREA

The Long term Boat Storage area across Jefferson Drive front the Marina will be graded and covered with gravel. Historic chimneys in this area will be fenced to prevent damage. Parking spaces will be delineated to obtain maximum usage.

Existing Boat Slips

1. Marina – interior docks will be repaired and refurbished
2. Beach 3 – unchanged
3. Beach 4 – existing docks repaired and refurbished

ADDITIONAL LAKE FACILITY REQUIREMENTS DATA

Boat Launching facilities are currently marginal to serve the Trailer Boating Community. Dock space rental is far less than we currently need for both Powerboats and Pontoon Boats. The current waiting list for powerboat dock rental is 2-3 years and pontoon boat 8-9 years.

Considering the projected number of boats (817) owned by inland lot owners at full build out, and the current waiting list for dock rental our current boat launching and docking facilities are totally inadequate.

Providing additional Boat Launching Ramps at a location other than the Marina appears to be impractical due to the topography and available space for car/trailer parking at existing LMOA owned waterfront land. Constructing additional launching facilities at the Marina will result in a loss of current Pontoon Boat dock spaces, and is not recommended.

Converting Beach 4 into a second docking area could provide sheltered docking for up to 50 boats. Developing these docks requires closing the present swimming area and installing floating docks in the area presently delineated for swimming. Utilization surveys of Beach 4 indicates significant under-utilization. This recommendation is predicated upon a new Beach located at the fishing lake—if it can be built.

ESTIMATED COST OF MARINA BUILDING IMPROVEMENTS

The following estimate based on the Marina Building size of 36 X 60 X 12 feet with a roof peak height of 15 feet. The building foundation, floor concrete slab, and steel structural trusses are capable of supporting the proposed improvements without repair or alteration.

Remove 3 Large Garage doors and metal siding	2,000
Frame and insulate exterior walls	11,500
Material and labor to purchase and install door and windows	4,000
Install exterior sheathing and vinyl siding	6,000
Install and finish interior sheetrock	3,400
Install interior partitions and finish sheetrock	2,900
Insulate Roof	1,900
Install Drop ceiling	2,700
Upgrade and additions to Electrical System	4,000
Upgrade and addition to Plumbing	4,000
Upgrade and modifications to Heat and Cooling Systems	8,000
Total	\$50,400

GREEN SPACE

The following LMOA owned parcels, which comprise over 200 acres of green space, are not suitable for development and should be retained as LMOA natural areas for hiking, picnicking, swimming and fishing. We find no evidence that the majority of LMOA members know that some of the larger parcels belong to LMOA. Action is needed to inform the membership of the availability and the location of the parcels, and to clear and mark hiking trails.

Lot 145A, Section 3

Lot 523A, Section 3

Parcels adjacent to the Rivanna River

Lot 18A-1-E behind Section 6

Lot 18A-1-D downstream from the dam

Lot 9A-2 behind Section 7

Lot 18A-10-11 behind Section 10

Lot 273, Section 5

Lot 323A, Section 12

Lot 243A, Section 9

Lot 202A, Section 9 Unnumbered parcel between Marwood Dr. and Smokewood Dr.

Pipeline easement

Lot 184, Section 12

Lot 1A, Section 8

Lot 24A, Section 12

LAKE MONTICELLO FOOD SERVICE FINANCIAL SERVICES

	YEAR 1995	YEAR 1996	YEAR 1997	YEAR 1998	3MO'S 1999	5MO'S 1999	ANNUAL BUDGET
REVENUE	\$ 132,176.00	\$ 156,558.00	\$ 152,647.00	\$ 318,082.00	\$ 43,358.00	\$ 100,240.00	\$ 303,985.00
EXPENSE	\$ 223,463.00	\$ 261,464.00	\$ 215,766.00	\$ 369,372.00	\$ 66,067.00	\$ 126,116.00	\$ 345,858.00
TOTAL LOSS	\$ 96,287.00	\$ 104,906.00	\$ 63,119.00	\$ 51,290.00	\$ 22,709.00	\$ 25,876.00	\$ 41,873.00
LOSS/REVENUE	\$0.76	\$0.67	\$0.41	\$0.16	\$0.52	\$0.26	\$0.14
EAGLE NEST RES.							
PRO SHOP SNACK BAR							
REVENUE	\$ 48,788.00	\$ 60,961.00	\$ 74,903.00	\$ 114,197.00	\$ 14,895.00	\$ 39,402.00	\$ 113,000.00
EXPENSE	\$ 67,994.00	\$ 69,509.00	\$ 83,801.00	\$ 130,809.00	\$ 20,575.00	\$ 45,703.00	\$ 125,935.00
TOTAL LOSS	\$ 19,206.00	\$ 8,549.00	\$ 8,898.00	\$ 16,612.00	\$ 5,680.00	\$ 6,301.00	\$ 12,935.00
LOSS/REVENUE	\$0.39	\$0.14	\$0.12	\$0.15	\$0.38	\$0.16	\$0.11
COMBINED							
REVENUE	\$ 180,964.00	\$ 217,519.00	\$ 227,550.00	\$ 432,279.00	\$ 58,253.00	\$ 139,642.00	\$ 416,985.00
EXPENSE	\$ 296,457.00	\$ 330,973.00	\$ 299,567.00	\$ 500,181.00	\$ 86,642.00	\$ 171,819.00	\$ 471,793.00
TOTAL LOSS	\$ 115,457.00	\$ 113,454.00	\$ 72,017.00	\$ 67,902.00	\$ 28,389.00	\$ 32,177.00	\$ 54,808.00
LOSS/REVENUE	\$0.64	\$0.52	\$0.32	\$0.16	\$0.49	\$0.23	\$0.13
PRO SHOP SNACK BAR							
REVENUE AS A %							
TOTAL REVENUE	27%	28%	33%	26%	29%	39%	37%

TOWNSHIP FOR LAKE MONTICELLO—A PRELIMINARY STUDY

INTRODUCTION

During the recent election of the Board of Directors, the issue of township for Lake Monticello was raised, with no conclusive reason given either to support or oppose changing the legal status of the Association. The main question is whether our community, by law now a Property Owners' Association, should become a town rather than remain a private, gated residential Owners' Association. On the surface, the question might seem to be a simple one when referenced to one or two issues, However, there are a considerable number of issues involved in this topic, all of which would have to be resolved satisfactorily, before this Committee could make any suggestions or render any opinions on the desirability (or lack thereof) and impact of township on the community.

Some of the most obvious issues are discussed here in general terms only, because each issue itself has complicated factors. A great deal of further investigation and study must be conducted before an intelligent recommendation can be made.

RESULTS OF BECOMING A TOWN

A town is an incorporated municipality. At present, Lake Monticello is a Property Owners' Association governed by state law on the rights, duties and obligations of such an association. All property owners belong to the Owners' Association and have agreed, as a part of the purchase procedure in the Association, to abide by its Bylaws and R&R's. In return, the Association manages the entire community and operates the common areas, which include roads, beaches, the lake, marina, golf course, clubhouse, etc. for the use of the members and their guests only.

Based on research and a conversation with an attorney of the Division of Legislative Services, the state body that writes the legislation for the General Assembly, it is a certainty that the Owners' Association would have to be terminated before Lake Monticello could convert to a town. It is not possible to be both an Owner's Association and a town. The state's attorney has not been able to find any information on a gated community applying for township possibly because there are no such previous cases. She made it quite clear, however, that in her opinion a town cannot have gates and card keys for its citizens.

In other words, once Lake Monticello became a town, the gates would come down. Thereafter, its' roads, as well as its' common areas would be open to the general public permanently. Following the opening of the gates, I believe that the traffic on our roads would increase markedly, for instance, with people seeking shortcuts to Rtes. 600 or 53, for example, as well as those coming to use our (now public) amenities – beaches, marina, the lake, the clubhouse, golf course, etc. This would certainly lead to more crowding at those areas, plus additional noise and trash. Use of the beaches and the lake might be a special attraction, particularly for teenagers. Gone also, would be the type of security we have now, even with a town police force. This, as well as loss of exclusive use of the common areas, could be considered the loss of a valuable asset by the property owners, and the outcome of demands for compensation for this potential loss

is totally unknown at this time. An increase in petty crimes, such as at the playgrounds, is not entirely unlikely, as well as possibly an increase in more serious crimes, for example, car burglary and theft.

Another important question is determination of ownership of LMOA's monetary assets, including the \$6 million remaining after the sale of the LM Service Company, as well as other LM monies. Further research is needed to give an opinion on this. Also unknown, is the impact on the value of property upon becoming a town.

INCORPORATION INTO TOWNSHIP

Firstly, there are three methods of incorporating into a town. Two require a bill passed in the General Assembly. The third requires a petition signed by 100 voters of the proposed town, sent to the Circuit Court, and then to the Supreme Court, which calls a Special Court to oversee the matter. All of them also require subsequent issuance of a town charter by the General Assembly.

Acquiring township by passage of a bill in the General Assembly requires either setting up an election or a public hearing. Then if a majority favors incorporation, a charter is drafted and a state delegate needs to be convinced to introduce and carry the bill. This bill will die if it isn't passed in the same session.

A third way: getting 100 signatures on a petition. However, research shows that the Court has the widest discretion on granting the petition, and even if a very large majority of the locality is in favor, the Court will deny the petition when it believes the evidence does not show that the general good of all the inhabitants will be promoted. Research is needed to try to find legal definitions of "general good" and "promoted" and what the Court would rely on in making its' decision.

In this procedure, the Commission on Local Government can order a hearing to see if the statutory tests for incorporation have been proved. Some tests are: whether incorporation will be in the general interests of the inhabitants; that the general good of the community will be promoted; and by census, the population density is not to exceed 200 persons per square mile.

Whether the Court would find removing our gates and opening the community to the general population as a town, with potential increases in traffic, noise, pollution, etc. would serve the general interests of the whole community, must be researched. This is a separate issue from promoting the general good of the inhabitants.

The criteria requiring a population density under 200 people per square mile would probably require a new census – again, by whom and how paid for is as yet unknown. It is also unknown whether our open areas, e.g. the lake, roads, beaches, golf course, etc., would be included in fixing population density. That could determine whether we meet this test.

OTHER AREAS FOR FURTHER STUDY

Municipal powers – as an incorporated town, we would need an elected governing body and a clerk, who would have to be paid officials. We would need the basic departments necessary to run a town, staffed with paid employees. We probably have some of these now, and might be able simply to convert them into municipal departments, but that is an assumption and would need investigation. The law would require that we have a Planning Commission, and a Board of Zoning Appeals.

A town has all powers authorized to be exercised by a governing body and not prohibited by the Constitution or laws of the Commonwealth. It may pass and raise taxes and assessments necessary to pay debts, defray expenses and perform the function of a municipal body. It may incur indebtedness and borrow money, which of course would have to be repaid from town revenues, possibly leading to a special tax increase just for this purpose, as well as other taxes for the inhabitants. It may sue and be sued in its own name regarding its duties. Members of governing boards, such as a Board of Supervisors are not immune from acts of intentional misconduct or gross neglect, and should be insured.

Employment may not be based on residency, so persons from outside the town could seek and, if qualified, obtain jobs here. If there are more than 15 town employees, the town must have a grievance procedure. Workers' compensation must be provided. A town must have an officer responsible for financial affairs. It has the power of eminent domain, meaning, of course, that anyone's land can be condemned at the will of the governing body for purposes it considers suitable for the good of the town.

A town may impose taxes upon owners of abutting property for sidewalks, paving alleys, curbs, gutters, retaining walls, water lines and streetlights. As a result, there is a good likelihood that property taxes would be higher than they are now from the county. A town must pass a Comprehensive Plan every 5 years. This has specific procedures to be followed, including public hearings.

We would have the option of sharing powers jointly with another entity – in this case, obviously, the County. Assuming the County was in agreement, we would have to determine which employees could be shared and pay our percentage accordingly, but would have to find out which employees would be able to handle both entities.

Finance is another extremely important area. We must find out which services now paid for by the County, which would become our obligation on incorporation, and which that we now pay, if any, would become the responsibility of the County.

The effect of incorporation on property and other taxes as well as fees must also be studied to determine whether overall, incorporation would ultimately save money or increase taxes and fees. The whole area of finance will need careful study to determine whether township would be a cost benefit or detriment. The opinion of a fiscal expert would certainly seem to be in order here.

CONCLUSION

An Ad Hoc Committee should be appointed with members from the BOD and the Planning Committee, at least one of who should be an attorney, to study all of these issues and questions before an attempt is even made for the Committee to make a recommendation. In no way, are we ready to present a complete report, or make any recommendations to the Board at present.

LMOA MASTER PROGRAM SCHEDULE

	1999		2000				2001				2002				2003			
	3/99	4/99	1/00	2/00	3/00	4/00	1/01	2/01	3/01	4/01	1/02	2/02	3/02	4/02	1/03	2/03	3/03	4/03
ADMINISTRATIVE SPACE																		
ELECTRONIC COMMUNICATION and FILING																		
CROSS COMMITTEE ACTIVITIES																		
COUNTY AND STATE INVOLVEMENT																		
PREVENTIVE MAINTENANCE																		
RECONFIGURE THE CLUBHOUSE																		
IMPROVE FOOD SERVICE																		
IMPROVE RUN-OFF CONTROL RULES																		
COMPLETE THE SEVEN YEAR ROAD and DRAINAGE PROGRAM																		
ENSURE FUTURE ROAD and DRAINAGE MAINTENANCE																		
CONTINUE and IMPROVE LAKE MAINTENANCE																		
IMPROVE and GILL RULES and RES																		
WALKING, JOGGING and BIKING TRAILS																		
PRO-ACTIVE WILDLIFE CONTROL																		
LINE-OF-SIGHT and ROAD MARKING																		
IMPROVE THE GOLF COURSE																		
IMPROVE GOLF COURSE MAINTENANCE																		
IMPROVE PRO SHOP and PARKING																		
POLICE FORCE FOR 10,000 RESIDENTS																		
IMPROVE BOATING SAFETY RULES																		
BEACH IMPROVEMENTS																		
BOAT and RV STORAGE																		
RESEARCH YOUTH CENTER CONCEPT																		

KEY TO SYMBOLS

① BOD Assign Action ③ BOD Approve Plan
 ② Implementation Plan to BOD ④ → Implement
 ⑤ Program Complete

