



Welcome to the 38th SAMLARC Annual Meeting

February 22, 2024
SAMLARC Board of Directors

Call to Order

President Paul Persiani



Homeowners Forum

- Homeowners Forum provides an opportunity for Homeowners to address the Board regarding items on the agenda, as well as matters not on the agenda. While Board Members may ask questions, Homeowners Forum is not intended to serve as a two-way dialogue with the Board.
- Homeowners wishing to address a particular action item on the agenda are requested to complete a Membership Participation Form – Specific Action Item on the Agenda and submit it to staff.
- Homeowners wishing to address a matter not on the agenda are requested to complete a Membership Participation Form – Matters Not on the Agenda and submit it to staff.
- This is the only time on the agenda that these matters will be heard. The Board cannot take action on items not identified on the agenda. The Board President may direct staff to follow up on issues as deemed appropriate. Please limit comments to 3 minutes.

Approval of the 2023 Annual Meeting Minutes



2024 Board of Directors



Paul Persiani



Judy Vasquez



Greg Wieckert



Deborah Christensen



Nate Farnsworth



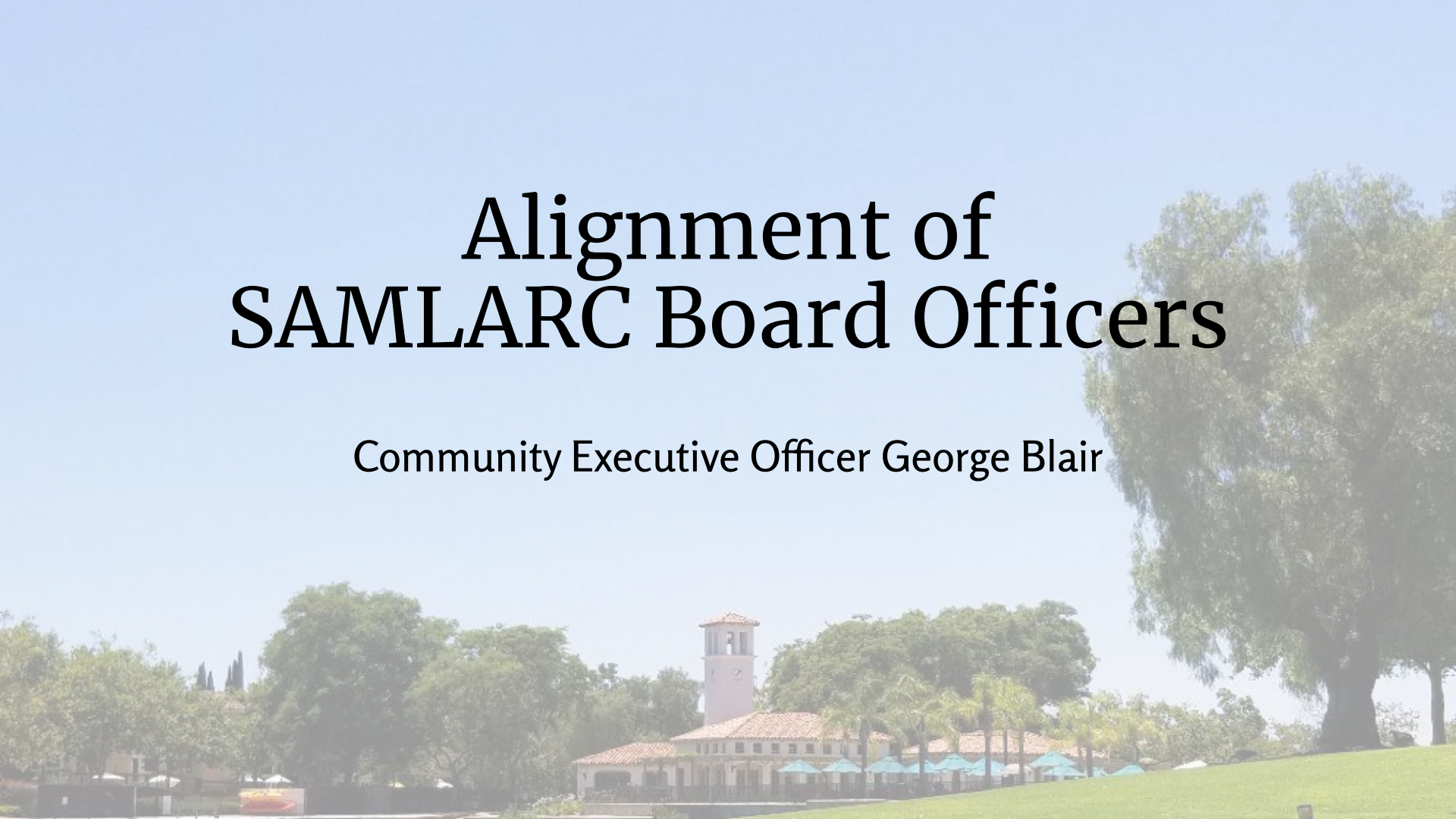
Jeff Halbreich



Greg Schnieders

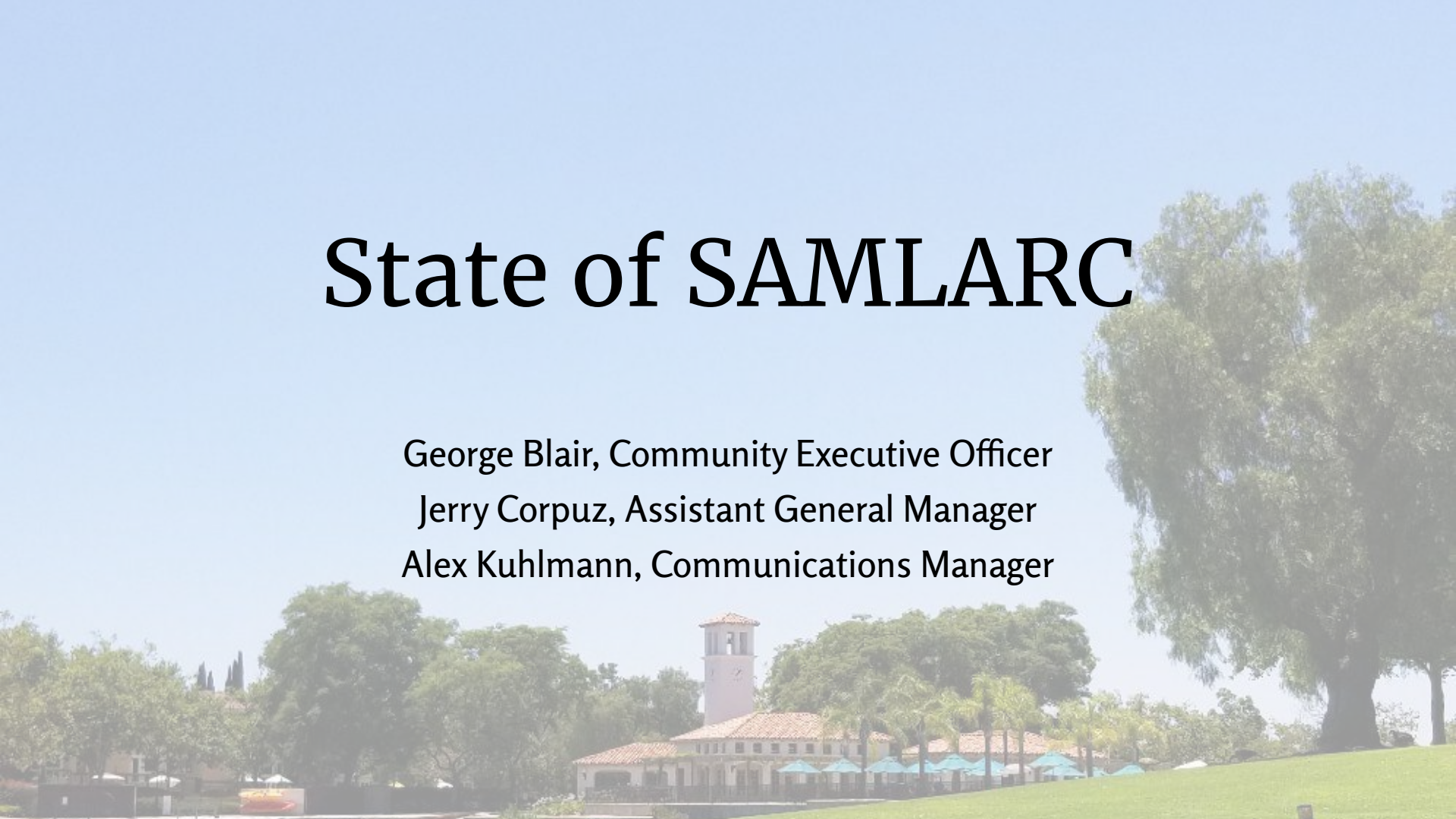
Alignment of SAMLARC Board Officers

Community Executive Officer George Blair



State of SAMLARC

George Blair, Community Executive Officer
Jerry Corpuz, Assistant General Manager
Alex Kuhlmann, Communications Manager



Foundations

- Lifestyle Village with Intentional Design
- Established in 1986
- Built by Members for Community Connection



Community Scale



13,646 Homes



Lago Santa Margarita



Beach Club Lagoon



13 Parks



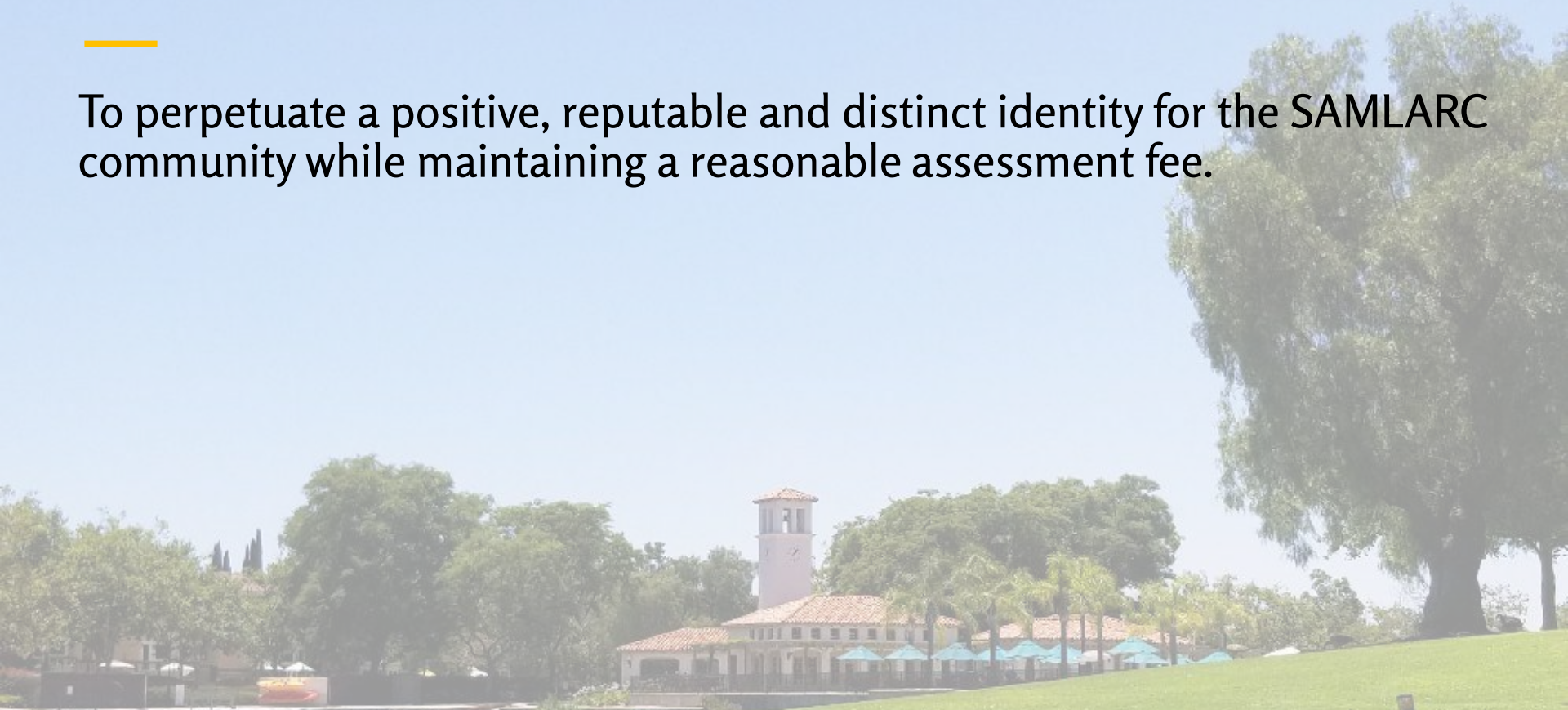
9 Trails



4 Pools

Mission Statement

To perpetuate a positive, reputable and distinct identity for the SAMLARC community while maintaining a reasonable assessment fee.



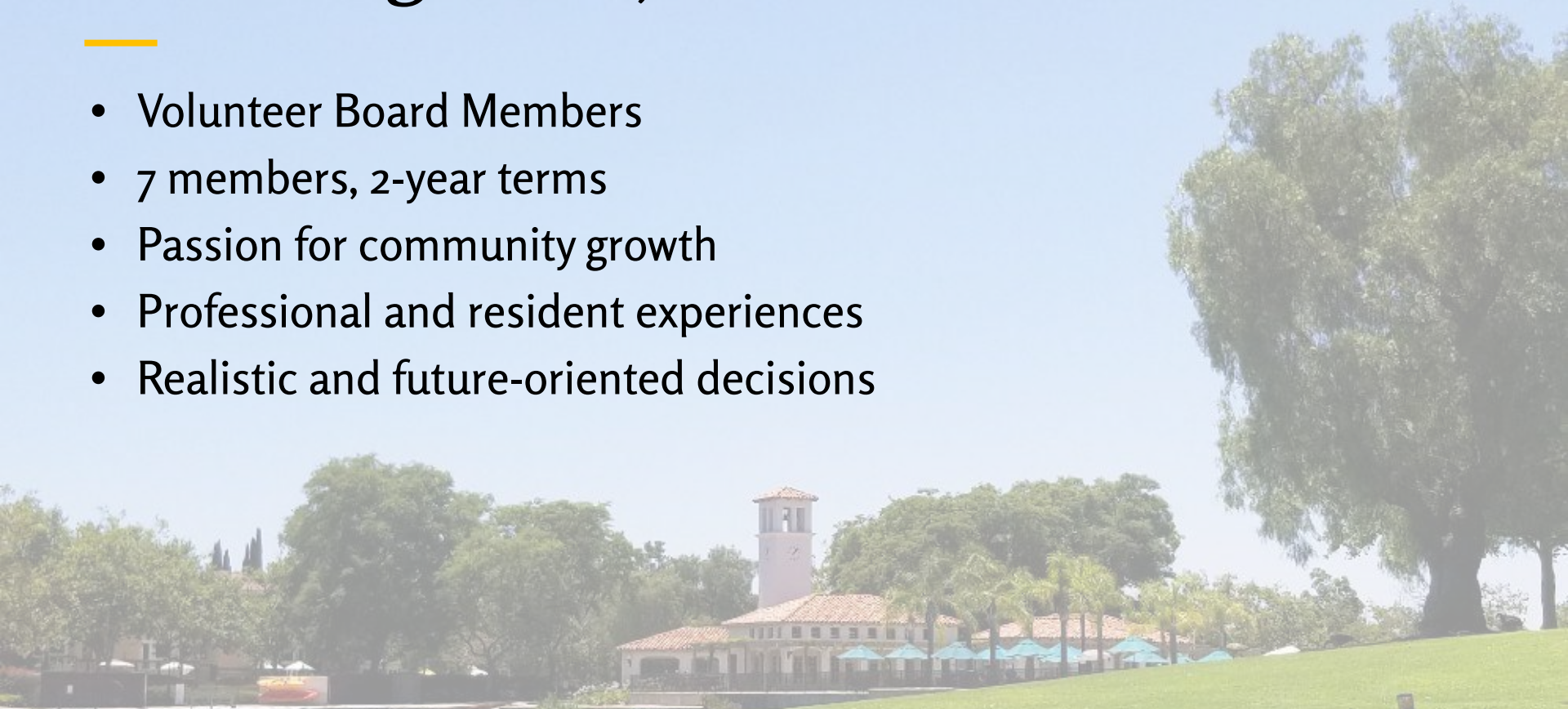
Vision Statement

To use SAMLARC's positive, reputable and distinct identity as a means for homeowners to enhance, value and support:

- Well maintained neighborhoods and park facilities;
- Resident interaction through social, recreational and community events and programs;
- Visionary committees;
- Strong relationships and partnerships among the volunteer members within the broader community; and
- Strong relationships and partnerships with the City of Rancho Santa Margarita to develop the broader community to its fullest extent.

Your Neighbors, Hard at Work

- Volunteer Board Members
- 7 members, 2-year terms
- Passion for community growth
- Professional and resident experiences
- Realistic and future-oriented decisions



Member Committees



Architectural Review



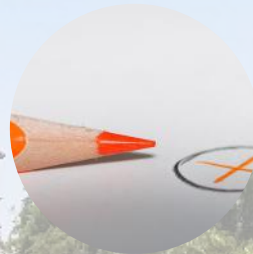
Community Lifestyle



Communications



Covenant



Election



Sports Council

Board Committees



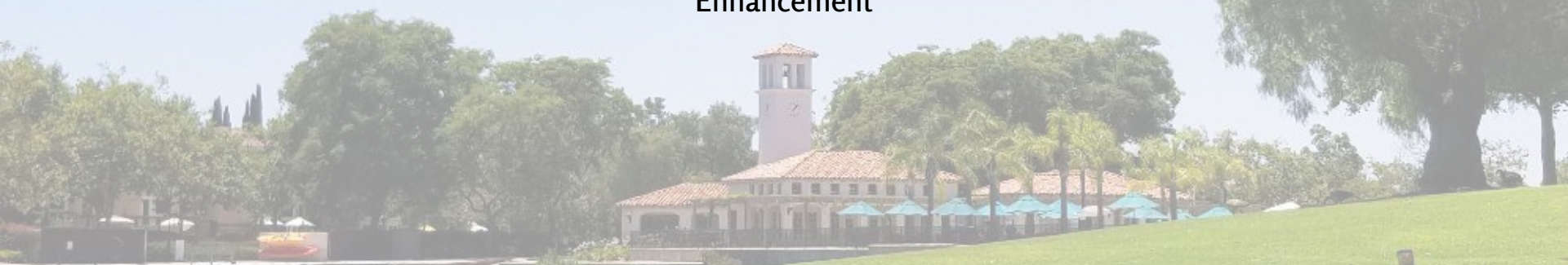
Budget & Cash Flow



**Landscape & Facilities
Enhancement**



Insurance Review



SAMLARC Team

- Team of 22 - dedicated, onsite staff
 - Partner with larger FirstService Residential Team at Irvine Regional Office
- Solution-driven
- Commitment to excellence
- Nominated for Onsite Team of the Year within FirstService Residential California



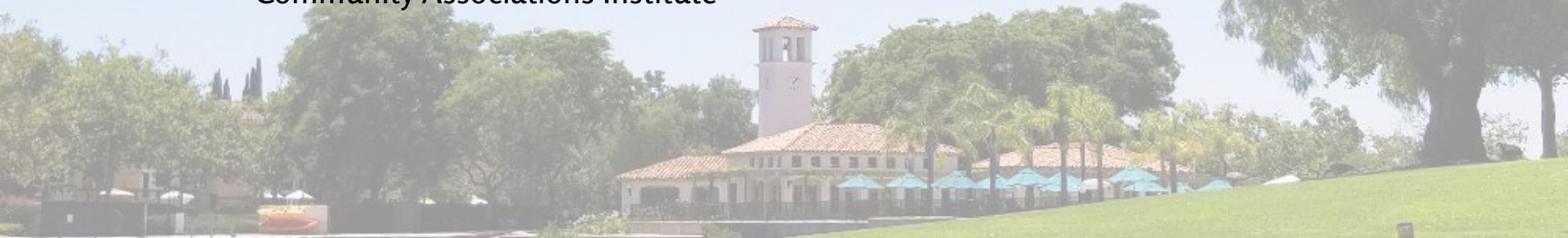
Community Partnerships

- Civic

- City of Rancho Santa Margarita
- Santa Margarita Water District
- Orange County Sheriff's Department
- Orange County Fire Authority
- Common Interests
 - Community Associations of Rancho
 - Community Associations Institute

- Local Investment

- Chamber of Commerce
- RSM Cares Belltower Foundation
- Youth Sports Council
- Rotary Club of Rancho Santa Margarita/Coto de Caza



Strengthening Community Bonds

- City of RSM - Holiday Banners
- Chamber - Rancho Family Fest
- RSM Cares - School Supply Drive & Food Pantry Bins
- CAR - Fire Safety & Community Preparedness
- Rotary - Charity Golf Tournament Donation



Strengthening Community Bonds

- Youth Sports Activities
 - Registration and Opening Day Activities, Seasonal Field Permits, Sports Council
- Rofer Foundation Charity Walk
- Eagle Scout Projects
 - Little Library at Altisima Park
 - Bench Refurbishment at Monte Vista Park



Financial Foundations

- Strategic Financial Operations
 - Chief Financial Officer
 - Budget & Cash Flow Committee
 - Well-funded reserve balance
 - Revenue budgeting & mapping
 - Active expense management
- Industry Impacts
 - National inflation
 - Contract & labor rates
 - Utility rates
 - Vendor management

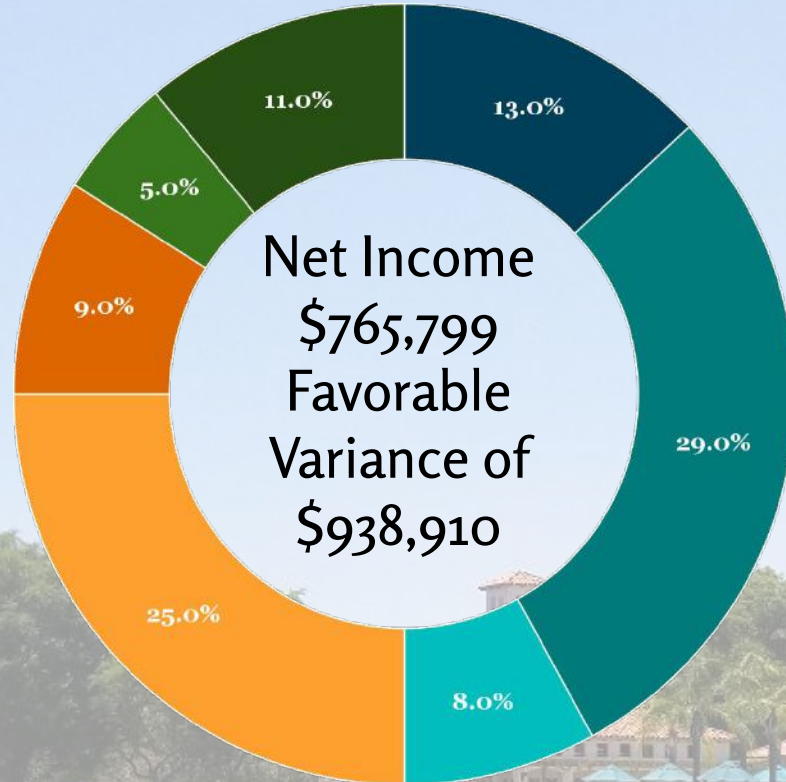


Financial Highlights

- No assessment increase despite national inflation
- Reserve contributions fully funded at 99.98%
- Operating expenses efficiently managed at 93% ~ \$837,000 under budget
- Water savings 40% ~ \$686,000 in favorable variance
- Operating cash balance
 - Beginning of 2023: \$1,790,245
 - End of 2023: \$2,559,299



Financial Management

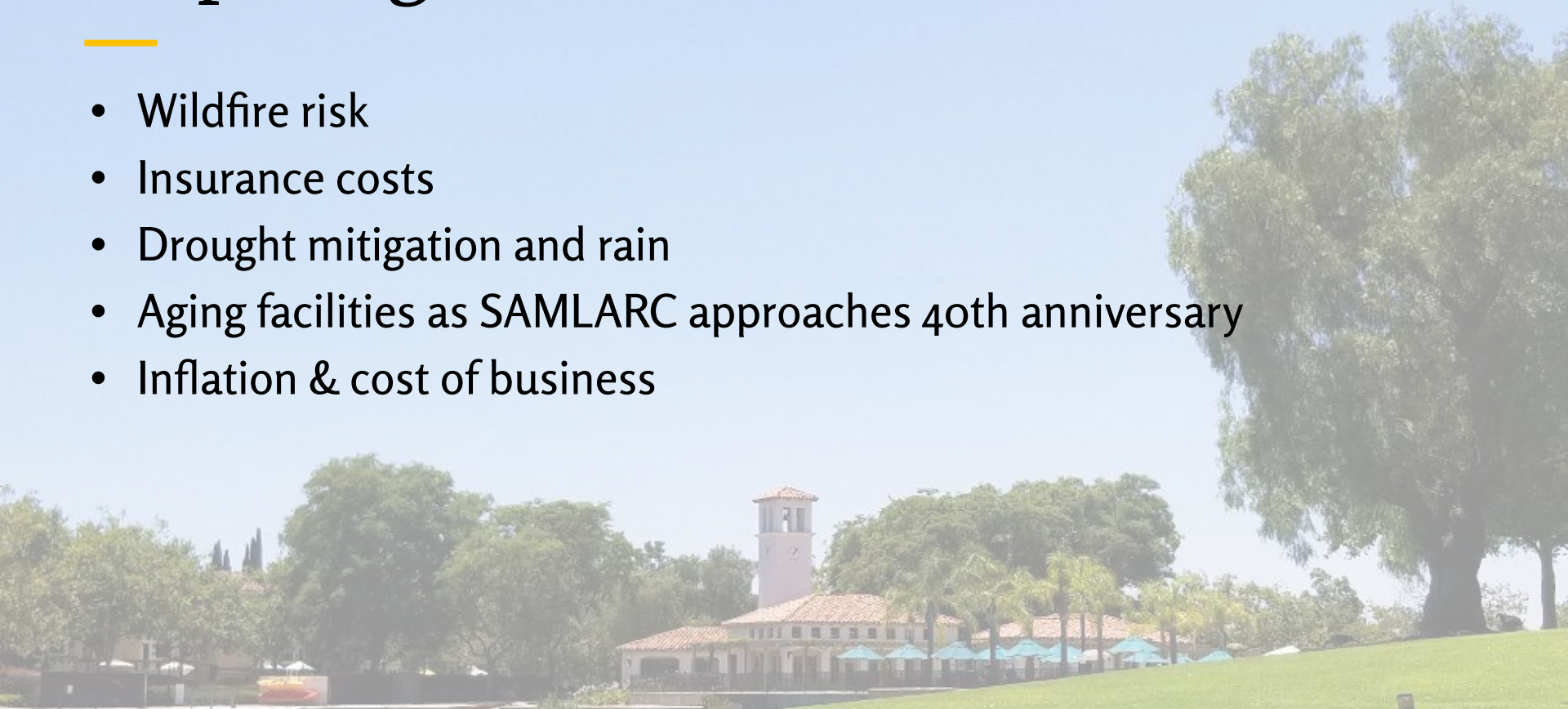


Net Income
\$765,799
Favorable
Variance of
\$938,910

- Reserve Contributions
- Landscape Operations
- Water Usage
- Common Area Operations
- Professional Services
- Lifestyle & Communications
- Community Services & Administration

Preparing for the Future

- Wildfire risk
- Insurance costs
- Drought mitigation and rain
- Aging facilities as SAMLARC approaches 40th anniversary
- Inflation & cost of business



Project Management Philosophies

- Prioritize community usage
 - School calendars & sports seasons
 - Collaboration with City project calendars
 - Seasonal planning
- Vendor management
 - Consistent evaluation
 - Expand services while keeping mindful of Member dollars
 - New vendors: pools, security, and janitorial



Community Stewardship in 2023

- 86 Reserve projects completed
- Parks & trails
 - Pickleball court expansion
 - 72 Lakeshore Victorian benches
 - Cañada Vista field conversion
- Beach Club
 - Deck Seal | Lifeguard Towers | Beach Club Pavers | Tarp Replacement
- Infrastructure projects
 - Stucco | Wrought Iron | Concrete | Painting



2024 Projects Ahead

- Turf conversion on Alicia & Santa Margarita Parkway
- Altisima Pool facility renovation
 - Pool plaster, tile, lights, coping
 - Deck coating
 - Restrooms
- Maintenance projects
 - Melinda Heights neighborhood stucco wall & wrought iron project
 - Bench refurbishment (12 parks, 6 trails)
- Eagle Scout project
 - Fishing lure disposal stations



Places to Connect

- Lago Santa Margarita
- Beach Club Lagoon & Pools
- Parks & Trails
- Clubhouses & Picnic Shelters
 - 296 Clubhouse reservations
 - 631 Picnic shelter reservations



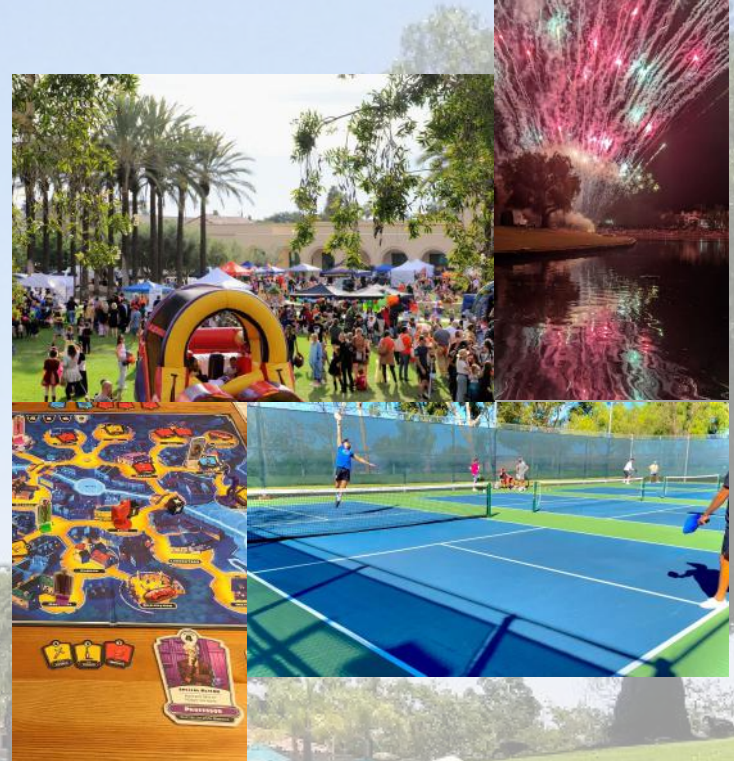
Valuable Neighborhoods

- Mediterranean influence
- 419 Approved projects
- Covenants & Resolutions
- Resources
 - Annual Architectural Standards and Policies & Guidelines
 - Online home improvement requests
- Coming Soon: Open House Events



Lifestyle Connections

- Clubs
 - Hobbies & skills
 - Games, books & more
- Programs
 - Community interest
 - Local expertise
- Events
 - Member-exclusive events
 - Large-scale celebrations



2023 Event Highlights

- Record attendance at signature events
- New Bacon, Bourbon & Blues event
- Event enhancements:
 - Carols 'Round the Lake: Gingerbread Lane Santa Meet & Greet & Craft Station
 - Fishing Derby: Bradley Rofer Prize for Tiniest Fish
 - Great Rancho Campout: stargazing & waterslide



2024 Events Preview

- Animals Everywhere
March 23 | Feathered & Furry Friends
- Gardening Workshops
 - Adults: April 6 | *Storybook Come to Life*
 - Children: April 13 | *All About Ladybugs*
- Wine & Cheese
May 4 | Flavors & Fun
- Beach Club Opening Day
May 11 | Summer Season Kickoff
- New Member Receptions
- Music at the Lake Summer Series



Community Lifestyle Partners



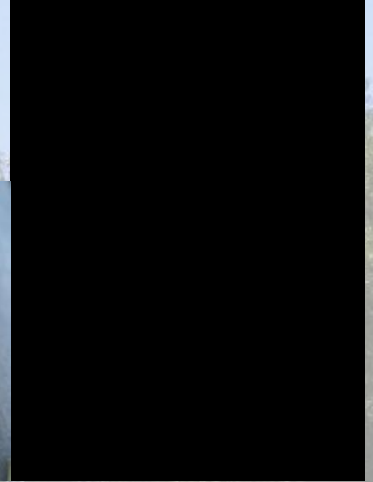
Volunteer Opportunities

- Local organizations
 - Sports & Scouts
 - RSM Cares: Food Pantry & Zero Trash Days
 - Rotary: Military Family Support
 - Chamber: Rancho Family Fest
- SAMLARC Volunteering
 - Events
 - Committees
 - Board



Resident Resources

- Welcome Guide
- Website
- Monthly e-Newsletter
- Social media
- Resident Portal
- Coming Soon: SMS notifications
- Beach Club & Business Offices



Thank You

