

lake association recipe book



Lake Association Stew:

A Better Recipe for Getting it Done

by John Baker

Preface

This is not a recipe book. It's a guide book based on the experiences of the Friends of Moose Lake in building their lake association during 2010 (<http://www.friendsofmooselake.org>). It is designed to help citizens who want to organize in some manner to represent their lake and speak on its behalf. The guide book is divided into **three levels**, each of which can be effective in creating a volunteer lake association.

The **“informal”** level is the minimum that could be done to establish a network of volunteers to help out at your lake and requires the least amount of work. It's more about getting to know your neighbors, the lake's history, and understanding any concerns there are about your lake.

The **“semi formal”** level is intended for lakes without serious issues but where the lake property owners feel the need for a more formal organization in order to be recognized by local and state government agencies as well as by organizations concerned with conservation.

The **semi formal** level also implies more active roles on the part of the volunteers. This work might include developing bylaws, electing officers and

directors, recruiting members, raising funds for projects, surveying residents, gathering lake history, monitoring and recording lake data, and developing a plan for the lake that everyone agrees on. It could also involve incorporation as a way to protect those elected.

Last is the **“formal”** level. At this level a lake association is very active. This level implies that there is something at your lake that needs attention. Whatever this is, it will likely need funding and at some point the association may need to be **qualified** in order to ask the state for grant money. Consultants will need to be hired to evaluate the lake and provide expert information about what needs to be done. Liability insurance may be needed. Large donations might also be made and the donors would expect those to be tax deductible so the association might apply for 501(c)3 status with the IRS.

At the end of this booklet is a short paragraph about **maintenance**. While it applies mainly to the semi formal and formal levels, it can help an informal lake association stay viable too.

Creating an organization and giving back some of your time for the betterment of the lake you have known and appreciated over the years will be a rewarding experience. No matter what level you choose, you will have to be a good listener, a good communicator, and a good negotiator. Above all else, don't put off getting started. The sooner you get started, the more time you'll have to shape your organization to provide the maximum benefit for your lake. Good luck!

(NOTE: With one exception, I intentionally did not include phone numbers, email addresses, names, postal addresses, websites, links, etc. All of these will change over time and all are different for different parts of the state. It will take a little Google'ing, but most can be found with minimal effort).



An Informal Lake Association

Use this recipe if you want to create an **informal** group to be the stewards for your lake. There is no need for bylaws, dues, or anything of the sort. It's just neighbors getting to know one another and talking on a regular basis about what they see going on at the lake and what their **vision** is for the future. There are **three key things** to do at this level: communicate, communicate, and communicate.

Communicate

1. Meet with or send a letter to those who own property on the lake explaining what you'd like to do and ask for their input. Include your phone number, address, and email address. To find everyone, use your county's property tax records. If they don't have a Geographic Information Web Server online, they will probably print out a list of all the lake property owners and the address where tax bills are mailed for you for free. Use this information as the first entry in your **contact list**. (Note: when creating your contact list, try to get as many **email addresses** as possible.)

2. Find out what **township** your lake is in and contact the township board secretary. Ask to speak to the board briefly at the next meeting. Attend the **township board** meeting, introduce yourself, and explain to them what you would like to accomplish. Leave your name, address, phone, and email address with them. Add their names and phone numbers to the **contact list**. (**Note:** the township hall is usually a free place to hold meetings.)

3. Contact **UW Extension Lakes, UWSP College of Natural Resources, 800 Reserve Street, Stevens Point, WI 54481 (715) 346-2116 uwexplakes@uwsp.edu** ...and ask for the director. Explain to them what you would like to do, and ask them to provide you with a copy of *The People of the Lakes* handbook (download the sections of interest from their website using this link <http://www.uwsp.edu/cnr/uwexplakes/districts/default.asp#Guide>)

They might also offer to have someone from their office meet with you to help you and your group get organized, explain the types of lake groups there are, and help you outline what steps are needed. Add their information to your **contact list**.

4. Contact your local **DNR** office, tell them what you are doing and ask for the phone number of the **lakes coordinator or lakes specialist** (this person may not work out of your local DNR office as many of them take care of multiple counties). Talk to the lakes coordinator or specialist and put their information on your **contact list**.

Give them your address, phone and email information. The DNR can be spread pretty thin, so you may not get a lot of help from them, but keeping them informed is very important.

5. Contact your **county board representative**. Tell them what you have in mind. Ask who the **county conservationist** is. Ask both to attend any meetings you have. Put their names, addresses, email addresses, and phone numbers on your **contact list**.

6. Contact local hunting and fishing clubs or conservation organizations such as Trout Unlimited, Musky Hunters, Ducks Unlimited, Sierra Club, etc....anyone that uses the lakes or is concerned about soil and water conservation. Let them know what you are doing and ask if you can put them on your **contact list**.

7. **Read** the *People of the Lakes* handbook. It has a lot of valuable information in it. It also has information that you aren't interested in, so skip those sections. It does contain important contact information.

*When you get through these first 7 points, you'll realize that **EVERYONE** you contacted has an interest in your lake, knows an event that took place there, or would like to help. Some people will suggest changes they'd like to see like a curfew at the public landing, horsepower limits, elimination of all weeds, having a neighbor paint their cabin a more neutral color than Luscious Lavender, etc.*



Communicate

8. Once each year hold a meeting. Invite **EVERYONE** on your **contact list** (not just the property owners). A potluck picnic would be very appropriate for an informal group. Send something out well in advance so people can reserve the date. Find a location on or near the lake. Get businesses to donate door prizes. At the picnic share the information you have found about the lake and what people you've contacted have said they would like to see done in the future. Collect money if you need some and tell people what it's for. Use the picnic to plan changes or activities (ie meet on a Saturday to clean brush from the park; or pick up litter around the public landing; or put up a sign helping with traffic flow, etc)

...and Communicate some more

9. In addition to a meeting, if you can find someone with the skills, it wouldn't hurt a couple times each year (January and July) to send out a newsletter with news gathered from people around the lake, events planned, etc.

Forms

There aren't any forms needed at this point. You could contact the UWSP Lakes Extension department and let them know that you have formed a lake association and what you've named it. There is no fee or obligation to do so.

A Semi Formal Lake Association

Forming a "**semi formal**" lake association requires a core group of people who are **committed** to the association and accountable for its success, however, you will need members who are less involved as well.

In this recipe you create more formal leadership in order to do work or activities at the lake. It involves having someone work as a liaison with the lake property owners, government agencies, and people that use the lake. It

involves completing forms, developing a set of bylaws, finding someone to collect money and do accounting, someone to recruit and track members and charge membership dues, and volunteers to do work at the lake. It involves **TIME**. So if you don't have a lot of **TIME**, you'll need to recruit help with these tasks. This is where the officers, directors, and committee leaders come in.

To get started, follow all the parts of forming an **informal** lake association and then do the following.

More Communication

1. Whether you've established an informal association or not, if the group feels there is a need to have a more formal association, **schedule a meeting** with them and have someone from the UWSP Lakes Extension attend to explain to the group what the options are and give them an idea of the roles and duties might include. They also can help estimate how much **TIME** each role will take.

Organize!

2. If the group agrees that a somewhat more formal structure is needed, you will need volunteers to help get your association **organized**. Some of the activities at this stage include: creation of bylaws, establishing dues, election of officers and directors, establishment of committees, holding board meetings, and holding your first annual membership meeting. Note that completing these are also steps toward becoming a **qualified** lake association should you decide to do that. A **qualified** lake association is explained later in the "**formal**" section.

In order to create a membership roster, collect membership dues, and work with lake planners, you will need to create a board of directors to guide the work and committees with someone acting as the committee chair to do the work.

Here is a sample organization:

Board of directors

Officers: President, Vice President, Secretary, Treasurer, plus three at large Directors (If your lake only has a small number of people, a minimal board of directors would include a president, secretary/treasurer, and one at large director).

Committee Chairs: Lake management, membership, fundraising, bylaws
More communication (part 2)

3. It's time to make the general public aware of your organization. However, it's important to first know what you are trying to accomplish at your lake **so setting the vision and goals** should be an agenda item at your first annual meeting.

At a minimum you should:

- Write an article or letter to the editor of the local newspaper (cost = \$0) to explain your association and your goals
- Find a member to donate time and materials to put a display case at the

lake (cost = \$0 if you can find a member to build or donate one)

- Create regular mailings to the property owners and contacts on your list to update them on what's going on at the lake...this can be a newsletter, but might also be a set of notes from the association's president
- Hold an annual picnic and invite the general public (cost can vary depending on donations).

4. After the meetings, it's important to **monitor and report** on the accomplishments of your association. Members will be interested in hearing from those that were elected or appointed about what's been planned and accomplished. This might include how many members there are, how much money the association has, important events and dates that are coming up, activities at the lake where help is needed, and even fishing reports.

Paperwork

5. **Incorporation** of your lake association will cost \$35 (2010) and protect those elected from being the target of a lawsuit. The association secretary will fill out a form and send it in on behalf of the association.

6. **Bylaws** can be a challenge. If you have formed a bylaws committee, they should be able to find sample bylaws in the *People of the Lakes* book or on the UWSP Lakes site. A good rule of thumb...keep them as simple as possible.

7. Join **Wisconsin Lakes** (formerly Wisconsin Association of Lakes) and fill out their application so that you are in their database and can access information they have about lake associations. Also join **your county's lake association** and have someone attend their meetings if possible.

Network

8. **Networking** with other organizations is important. If at all possible, have someone from your association attend meetings of the county board, township board, county conversation committee, Wisconsin Lakes, Wisconsin Lakes Convention, Trout Unlimited chapter, Ducks Unlimited chapter, and local sports organizations or clubs (skiing, snowmobiling, fishing, etc). These groups can be a source of help with lake activities, a source of funding, and endorse your association to government agencies.

A Formal Lake Association

So just when you thought you had done everything you needed to, someone asks why you aren't a **qualified** lake association and eligible for state grant money. Or they ask why donations to your association aren't tax deductible at the Federal level **(501(c)3)**.

By definition, a **qualified** lake association has to meet the following criteria: it must have bylaws, a statement of purpose regarding its dedication to conservation, have membership open to all on the lake or within a mile, doesn't limit or deny membership, has been in existence for one year, has at least 25 members, requires payment of annual membership dues (within certain limits),

and the association has to be incorporated. Filing for **501(c)3** status means filling out a very long application and sending it along with hundreds of dollars to the federal government.

You would use the **formal** level to solve one or more difficult problems at your lake (large sediment build up, aquatic invasive species, etc) or if you need a very formal structure for people to work within, and if you are going to have a lot of contact with government agencies, contractors and will be managing a large budget to get the work done.

Even if you plan to start at the **formal** level, as the Friends of Moose Lake did, you should still complete the **informal** and **semi formal** steps. Because you are going to be doing more than might be done at the informal or semi formal levels, you will want to organize both your board of directors and committees accordingly to ensure they are the right size and have the right level of commitment for the tasks at hand.

Still More Communication

1. It's time to broaden your communication to help the general public understand your organization and what you are trying to accomplish. Consider all of the following: build a small website (cost of about \$100 per year), write a more detailed article for the local newspaper and include photos showing the issue or problem (cost = \$0), develop a color brochure (cost = \$30 for high quality paper and if you can find someone to print it for free) and distribute it to all your members and contacts, create regular emails/mailings to contacts and members (president's notes; email = \$0 postage = \$10-20). In addition, there are many more ways to communicate such as social media sites like *facebook*, fishing sites such as *Lake-Link* where entries can be made about fishing at your lake, and others that strengthen your network of supporters.

Note: Consider **explaining what lake associations can and can't do**. Contrast them with **lake districts**. Use the definition in the *People of the Lakes* book for this.

2. Hold a meeting with your local **Lake Coordinator** within the DNR. This person can be found by looking at the DNR website or calling the local DNR office. They are the person who will score your lake grant application and represent your application in the discussions at the state level about which lake should get lake grant money.

More Organizing

3. The leadership of your association should look very carefully at what it takes to become a **qualified lake association**. If there are any shortcomings, action should be taken immediately to ensure that all the criteria are met. Without it, the association will not qualify for lake grants.

4. A **lake management plan** should be important to your lake if you are organizing formally. If you want to be taken seriously by the state, you will need to select a consulting firm to develop a lake management planning grant application (these are usually done for free) so you can receive state funds. The

deadlines for the applications are February 1 and August 1. In order to apply however, your lake association must be in existence for a year and it must be a **qualified** lake association.

5. Many of the **committees** you've formed will need to be very active. Membership is extremely important. Fundraising is also very important. You will want to make sure there are detailed plans for both and sufficient volunteer help.

Paperwork

6. If you expect large donations (ie from an estate, from someone who signs up as a life member, etc), you will want to file with the IRS for **501(c)3** status. This allows anyone paying dues or making a donation to deduct that donation on their income taxes. Filing online costs \$250 (2011). Any donation in the 18 months prior to approval can be deducted.

7. You should file the Lake Association Organizational Application form either with your Lake Grant Application or whenever you meet the criteria with the DNR so that your association will be recognized as a **qualified** lake association. This is a simple one page form with no fee required.



The Future of Your Association

What to do after you've organized

Getting organized isn't enough. **Maintaining your lake association** is just as important. Here is a list of ongoing work:

- Ensure that **lake monitoring** continues
- Make sure that **projects are ongoing** at the lake
- Keep your **lake management plan up to date. Review it with the DNR**
- **Maintain your organization so that leadership continues**
- **Maintain your enthusiasm and that of your members**
- **Keep a good network of contacts; keep them and your members informed**
- And lastly, **keep an open mind**. There may be someone out there who thinks all cabins on the lake should be painted Luscious Lavender...

