

## Brookshire Breeze

July—August 2008

### Update from your President

### Inside this issue:

Dear Brookshire Owners and Residents,

A lot has happened over the past several months and I wanted to give an update to help inform the community of recent happenings and future initiatives. In February, the new Board of Directors held an organizational meeting and elected a slate of Board Officers for the coming year. The immediate focus of the Board was to evaluate the Association's current physical condition of our facilities, employees and management services contractor financial cost and operational performance, status of past negotiations with Land Solutions, and the very critical position of the Association's finances.

Like any situation in business, and life in

general, it is necessary to identify and prioritize problems in order to plan where efforts should be made to develop solutions. What were the Associations problems that had been evolving over the past several years? There were a lot of little things and some not so little things that over time contributed to the major problem of **NOT ENOUGH MONEY**. The #1 problem of not having enough money goes back several years and involves the ongoing problem of unpaid annual assessments by some unit owners, unbudgeted payroll associated costs, and inflationary pressures on utilities and services. 2006 was supposed to end with an operating surplus according to the budget, but instead ended with a **deficit of \$28,000** (\$20k unpaid assessments and \$8k of overspending). Dues

were raised \$40 per owner for the 2007 budget which gave the board and additional \$22,760 for the 2007 budget. This was still not enough to prevent **another deficit of \$30,864** at the end of the 2007. The 2007 deficit was driven by \$26,534 in unpaid assessments and \$4,330 in associated legal fees. Additionally, the legal expenses Brookshire incurred related to the rezoning negotiations exceeded \$20,000 in 2007 with another \$4,000 carried over into 2008. Although this was a budgeted item, the budget should have been reviewed and adjusted as needed given our continual short-fall of cash in 2006 and 2007.

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### Brookshire Management Association

#### Alliant Property Management LLC

6719 Winkler Road Suite 206  
Fort Myers FL 33919

### CLUB HOUSE HOURS

6 AM—10:00 PM M-F  
8AM-10PM Sat—Sun  
Office PHONE 768-0332

# Community Activities

## Block Party



We are currently organizing for a community block party on August 16th coinciding with back to school for the kids. We are hoping to start meeting immediately for ideas and job assignments to make the day possible. We have discussed bounce houses, a pool party, food, entertainment, games, bingo, raffles, etc. Contact Jeff Key to get involved: 239-822-6087 or [jeffgkey@comcast.net](mailto:jeffgkey@comcast.net)

You may also contact Wilma Tarencz as she is the coordinator....you can call/email her 239 768 3224 or [presath99@yahoo.com](mailto:presath99@yahoo.com)

## Osprey Platform

Brookshire will soon be getting an osprey platform on the clubhouse pond adjacent to our cypress preserve. Community Environmental Services, our pond maintenance company, is donating the equipment and installation. Ospreys are a predator of fish and can be seen in our ponds diving into the water to take bass, gar, exotic tilapia and others for their meals. They can eat several fish in a day so they are often on the wing looking for their next meal. Hopefully, we will get to see them nest and raise their young from

the picnic area, dock or benches behind the clubhouse. Florida is abundant with splendid wildlife, some of which can be appropriate to integrate into the human community. Birding, in particular, is a fantastic activity to share with family and friends. Other wildlife management tools are in the works including bluebird boxes, bat boxes (by the preserve - not by the houses), and purple martin colonies. For more information, call Jeff Key 239-822-6087 or email [jeffgkey@comcast.net](mailto:jeffgkey@comcast.net)



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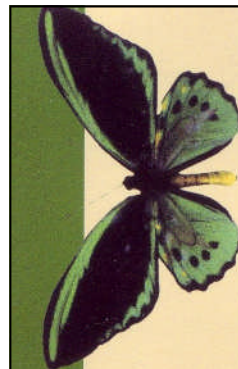


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# Delinquent Fees Impact All of Us



Each year, the Board of Directors gather data and hold workshops to determine the budget required to operate and maintain the services, common facilities and property in our community. The budget must include funds for contracting with landscape, pest control companies, employee labor and benefits, insurance, management services, utilities, general facility upkeep and more. Perhaps most importantly, we must ensure the community has an adequate reserve of funds to replace depleted assets and respond to any emergency. When the amount of the budget required

is determined, it is then divided among each unit owner (569 owners) to pay in the form of our annual master association fee that is due January 1 of every year or for a small fee, a quarterly payment is permitted and due on or before the first of each quarter – Jan 1, Apr 1, July 1 and Oct 1.

The economy is definitely suffering this year and we are all feeling it. People are struggling all over the US and especially in SW Florida. However, if one or more owners do not pay, or is late in paying, the Board faces a difficult budgeting issue in how to ensure continued services and timely repairs, without the money to pay vendors and service providers. In addition, attorney assistance must be obtained to help acquire the overdue funds. The hiring of attorneys takes more money from

our savings and budget.

The end result is a burden for all owners, whether it is in the form of an amenity being curtailed, a repair that must be delayed or put off due to a lack of funds, a higher annual fee or a special assessment to make up for funds not received. **Putting off paying annual fees, costs us all.** Owners have the option to pay ahead by paying annually so you do not have to worry about mailing checks every quarter. Automatic deduction is also available. Please remember that paying your annual master fee, on time and in full is important to ensure our maintenance fee budget remains reasonable for everyone and that we can continue to keep our community safe and well maintained.

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## Brookshire Breeze Editor

As the current editor I would like to take this opportunity to introduce myself . My name is Jeanne Biery and I live at 6900 ST. Edmunds Loop. My telephone number is 849-1949 and my email is [jeannebiery@comcast.net](mailto:jeannebiery@comcast.net). Please feel free to email, call or drop off any information about activities here in our community. You may also email to: [emailbrookshire@gmail.com](mailto:emailbrookshire@gmail.com)

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## Finally !!! Breeze via Email ...Yeaaaa!

Finally we will be able to send the Brookshire Breeze via email.

There are several ways that you can get on our email list for the Breeze.

1. Send me your email address [jeannebiery@comcast.net](mailto:jeannebiery@comcast.net)
2. Send your email address to: [emailbrookshire@gmail.com](mailto:emailbrookshire@gmail.com)
3. Put your email address on a list at the clubhouse.

Sending the Breeze to everyone via email will save our association a tremendous amount of

money. The cost of printing and distributing this paper even on a bi-monthly basis has become prohibitive.

During these difficult economic times we all have to make every effort to keep costs to a minimum. We feel that this is a cost saving measure that makes sense and will be more convenient for most in our community to get their news in the most efficient manner possible.

We also are currently working on a new Website. When this is complete the Breeze will be posted there.

In addition we will have a few hard copies at the clubhouse for those of you who don't have access to a computer.

Please make every effort to forward your email address to us in one of the ways previously described. It will help us keep costs at bay and consequently help all of you.

Thank you,  
Jeanne Biery, Editor

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## Brookshire Bits and Pieces

### Happy Anniversary !!

**Anna and Jack Messina** celebrated their 60th Wedding anniversary on April 17, 2008. Their celebration included a Caribbean Cruise.

**Monthly Lunch Bunch** has a sign up sheet in the clubhouse. Join your friends for fun and food !!

**Do you have a "club"** you want to start ? -- contact your editor or the clubhouse to put up a flyer

If anyone is interested in going to see **The Wizard of Oz at the Broadway Palm Dinner Theatre** -- we can get a Brookshire Group together. Wed, July 23 at 130pm for Matinee and Lunch. Lunch starts at 1:15pm and tickets are \$45 each for Lunch and the Performance or Sun Jul 20 2008 - 7:00 PM Price is \$49 for Dinner and the Show. Sign up at the clubhouse.



There is a "**suggestion box**" in the clubhouse that has a lock and index cards also in case a resident wants to drop a note after hours or in private

### Drop me a line.....

I will have to depend on you my friends and neighbors to keep me informed of events in our community. Please send me articles so that we can all keep informed and keep in touch with all our friends .

Thanks.

Jeanne Biery, Editor

[jeannebiery@comcast.net](mailto:jeannebiery@comcast.net)

Anniversaries  
etc.

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## Volunteer Wanted for



## Seminole Casino

We need a volunteer to be the co-ordinator for a trip to The **Seminole Casino Immokalee**. The casino is about 45 minutes away and it features over 950 Slot Machines. Games include classic favorites like: Blazing 7's, Wild Cherry, Double Diamond, Wheel of Fortune and more. *New* Machines start at just 2¢. Let's try and organize a group of people to sign up. If we get 30 people to sign up, they will provide free transportation for us.

The transportation company that

would be responsible for the trips advertises as follows:

**Special discounted menus** are available for groups with advanced reservations. **We offer transportation** to any group for a trip to our casino (**30 minimum**) at little or no cost to your group, in the following counties: Charlotte, Collier, Glades, Hendry and Lee county. **Groups providing their own transportation** can receive gaming vouchers to use in the casino and food vouchers to use at the EE-TO-LEET-KE Grill.

Motorcoach driver and group leader will receive a meal voucher.

For more information regarding groups or transportation, please contact Chris Barkhurst at 800-218-0007 Ext.203

**To volunteer for this assignment send an email to: [emailbrookshire@gmail.com](mailto:emailbrookshire@gmail.com) or sign up at the clubhouse.**

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The Brookshire Breeze is published by resident volunteers under auspice of the Association's Master Board. Sincere effort is made to insure that information contained in this publication is accurate. Should you find significant errors of fact, please notify the Clubhouse Office ASAP or your editor so that we can publish a correction in the next edition.

Any opinions stated in this newsletter, are opinions of the Author(s) only and do not, unless otherwise stated, reflect the opinion of the Association.

## President's Update (con't from page 1)



We spent close to \$25,000 in legal fees in regards to rezoning/Land Solutions, but unfortunately, a positive return on investment did not occur.

Some major capital expenditures were made in 2007 to re-equip the exercise room for approximately \$12k and upgrade the playground at a final cost of around \$17k. These expenditures were paid for from the appropriate Reserve Accounts. The Reserve Accounts have been used at year-end in 2006 and 2007 as an informal line of credit to meet operational expenses until the next year's assessment started being paid. The Reserve Accounts were paid back at the beginning of the following years and appear satisfactory on the surface. This has been accomplished in part during the past several yearly budgets by extending the estimated remaining life of certain assets. Borrowing from the reserves is not only a bad habit, but it is also restricted equity and

borrowing from the reserves takes appropriate permissions from the general members.

At the Board Meeting on November 29, 2007, the annual assessment was again increased by \$50 per unit, and the Budget was approved by a split vote. The nay votes were concerned that the planned assessment would be inadequate to maintain the operational plan. Well, it now is evident that they were correct. If we were to continue our rate of spending for the remainder of this year, without change, we would be on track to exceed our budget again by approximately \$50,000 in 2008. Action was required to avoid this.

What does any practical person do when they do not have enough money? They must get more money and/**or they reduce spending.** In the Association's case, the option for more money is an increased assessment on those still paying their dues – which we want to avoid. The other option is to look at all the cash outflows and make decisions on what expenditures

are truly critical to the ongoing operations. The management services contractor has been replaced effective June 1<sup>st</sup>, along with the implementation of a new on-site employee organization. The reorganization has been the topic of many discussions and soul-searching sessions and was not an easy or hasty decision. The final decision was determined by the current economic conditions facing us all combined with the overall macro-economic outlook for the foreseeable future.

These two major items will be responsible for **annual savings of approximately \$40,000-\$50,000.** Along with these two items, there are efforts under study to reduce our utility and contractor costs, and bring a marked reduction to the rezoning costs. Due to the above items, it will be necessary to make a revised Budget for the balance of 2008. At the same time a comprehensive restructuring of the Reserve Accounts will be performed.

There are still a number of other matters of concern to Brookshire residents and as they are addressed by the Board, we will be reporting on our progress and asking for your co-operation and support as a volunteer board to improve our community and bring the Association back to financial health and community spirit.

Best regards,

Debbie Keller, President

## 2008 Initiatives

- Continue to rebuild reserves & save money by reorganizing – do more with less where possible
  - Keep fees down - analyze the budget for the remainder of year and reallocate the budget and reserves as necessary
  - Discuss Land Solutions development and try to pursue discussions to maximize monetary benefit for Brookshire
- Collecting arrears from delinquent accounts.



## Announcements

- Glenn Barger resigned as President due to other commitments, but remains a director.
- Debbie Keller was elected President and Lee Redmond Vice President by the board members at the May 24<sup>th</sup> meeting
- At the same meeting, Michael Chase, from Brookshire IV, was elected to fill the open Board of Directors position
- Alliant Property Management takes over June 1 from Sentry Management Company
- Joe Murto, previously our morning and evening Clubhouse Supervisor will take over as Office Coordinator Mon-Fri effective June 1

There is a "**suggestion box**" in the clubhouse that has a lock and index cards also in case a resident wants to drop a note after hours or in private

## MEMBERS OF THE MASTER BOARD

Name	Title
Debbie Keller	President
Lee Redmond	Vice President
	Treasurer
Jayne Grant	Secretary
Glenn Barger	
Roxanne Connaughton	
Michael Chase	
Jack Foley	
Jeff Key	

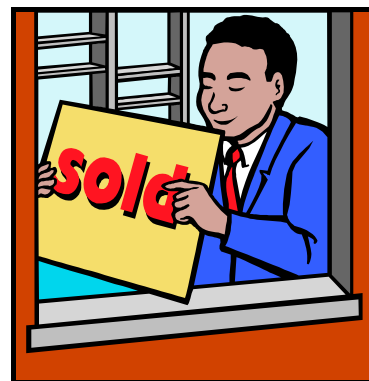
### RESIDENTS MAY CONTACT

#### MEMBERS OF THE MASTER BOARD

Residents can email if they have a concern, issue, praise, complaint, etc. to :

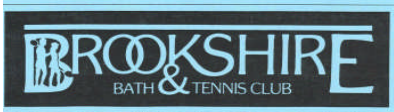
[emailbrookshire@gmail.com](mailto:emailbrookshire@gmail.com)

There is also a mailbox for each director in the clubhouse office. Residents may leave signed notes for a particular director in his/her box. These boxes are checked regularly.



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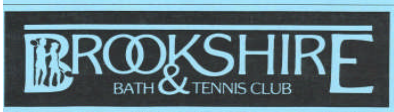
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# July 2008



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		<b>1</b> 9:00 AM Water Aerobics 1:00 PM Bridge	<b>2</b> 9:00 AM Water Aerobics 11:30 AM Lunch Bunch	<b>3</b> 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	<b>4</b> 9:00 AM Water Aerobics	<b>5</b>
<b>6</b>	<b>7</b> 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	<b>8</b> 9:00 AM Water Aerobics 1:00 PM Bridge 7:00 PM Bingo	<b>9</b> 9:00 AM Water Aerobics	<b>10</b> 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	<b>11</b> 9:00 AM Water Aerobics	<b>12</b>
<b>13</b>	<b>14</b> 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	<b>15</b> 9:00 AM Water Aerobics 1:00 PM Bridge 7:00 PM Bingo	<b>16</b> 9:00 AM Water Aerobics	<b>17</b> 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	<b>18</b> 9:00 AM Water Aerobics	<b>19</b>
<b>20</b>	<b>21</b> 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	<b>22</b> 9:00 AM Water Aerobics 1:00 PM Bridge	<b>23</b> 9:00 AM Water Aerobics	<b>24</b> 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	<b>25</b> 9:00 AM Water Aerobics	<b>26</b>
<b>27</b>	<b>28</b> 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	<b>29</b> 9:00 AM Water Aerobics 1:00 PM Bridge	<b>30</b> 9:00 AM Water Aerobics	<b>31</b> 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker		



# August 2008



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 9:00 AM Water Aerobics	2
3	4 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	5 9:00 AM Water Aerobics 1:00 PM Bridge	6 9:00 AM Water Aerobics 11:30 AM Lunch Bunch	7 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	8 9:00 AM Water Aerobics	9
10 8:30 AM Racquetball Doubles League	11 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	12 9:00 AM Water Aerobics 1:00 PM Bridge 7:00 PM Bingo	13 9:00 AM Water Aerobics	14 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	15 9:00 AM Water Aerobics	16 Block Party
17 8:30 AM Racquetball Doubles League	18 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	19 9:00 AM Water Aerobics 1:00 PM Bridge 7:00 PM Bingo	20 9:00 AM Water Aerobics	21 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	22 9:00 AM Water Aerobics	23
24 8:30 AM Racquetball Doubles League	25 9:00 AM Water Aerobics 6:30 PM -8:00 PM Pickleball	26 9:00 AM Water Aerobics 1:00 PM Bridge	27 9:00 AM Water Aerobics	28 9:00 AM Water Aerobics 4:30 PM Racquetball Doubles League 6:00 PM Poker	29 9:00 AM Water Aerobics	30
31 8:30 AM Racquetball Doubles League						