

# RESIDENTS' HANDBOOK

## Baytree Villas Homeowners' Association, Inc.

The Baytree Legal Documents and this Residents' Handbook should be kept with your important papers.

If you sell your home, the Baytree Legal Documents, the Residents' Handbook and any new handbook supplements should be given to (left for) the new owner.

# DRAFT

The Residents' Handbook was adopted by the Baytree Board of Directors on April 20, 2009, completely updated on January 25, 2021, and further **updated May 2025** to comply with the Re-stated Baytree Legal Documents which were approved 2/2/2024

## Table of Contents

	Page
WELCOME TO OUR SPECIAL COMMUNITY	1
THE BAYTREE VILLAS HOMEOWNERS' ASSOCIATION (HOA)	2
Board of Directors	2
HOA Legal Documents	3
Standards, Rules and Restrictions	3
Board Policies and Procedures	4
About Neighbors and Rules Violations	4
Residents' Handbook Supplements and Updates	5
Committees and Committee Charters	5
COMMON AREAS	5
The Clubhouse	6
Clubhouse Main Room, Pool and Spa, Library, and Fitness Center	
Clubhouse Facility Management	
Landscape	8
Greenspace	9
GENERAL INFORMATION	9
Contacts	9
Fees and Payments	9
Crime Prevention and Safety	10
Community Emergencies and the Baytree CERT Team	11
Baytree Fundraisers	11
COMMUNITY COMMUNICATIONS	11
Baytree Clubhouse Bulletin Board, Baytree Telephone Directory,	
Baytree Picture Directory, Baytree Scene Newsletter,	
Baytree Reminders, Baytree HOA Website, Baytree Bulletins, and	
Baytree Facebook Group	
YOUR HOME	12
Renting Your Home	12
Selling Your Home	13
Insurance	14
House and Villa Washing	14
ARCHITECTURAL STANDARDS AND RULES	15
Authority and Creation of Standards	
The Architectural Review Committee (ARC) Process	
The Architectural Review Committee and You	
Applying for Approval	

**See following page for Addenda Contents**

**ADDENDA  
RULES and POLICIES (Recorded)**

List of Addenda		Page 18
Age Restriction Policy	Addendum #1	19
Baytree HOA Sales and Lease Policy	Addendum #2	20
Architectural Rules and Restrictions	Addendum #3	21
Pool and Spa Rules	Addendum #4	25
Baytree Fitness Center Rules	Addendum #4A	26
General Restrictions Summary	Addendum #5	27
Landscape Policy on Maintenance of Grounds	Addendum #6	30

**PROCEDURES and GUIDELINES**

Resident Participation at HOA Board Meetings	Addendum #7	32
Villa Roof Process	Addendum #8	35
Committee Charters - Policies and Procedures	Addendum #9	37
Architectural Review Committee (ARC) Charter	Addendum #9A	
Clubhouse Facility Management Committee Charter	Addendum #9B	
Communications Committee Charter	Addendum #9C	
Greenspace Management Committee Charter	Addendum #9D	
Landscape Committee Charter	Addendum #9E	
Social Committee Charter	Addendum #9F	
Social Committee Procedures		
Villa Committee Charter	Addendum #9G	

## WELCOME TO OUR SPECIAL COMMUNITY

The quality living environment we enjoy at Baytree is the result of the direct involvement of its residents. Those who actively participate in managing its many administrative and social activities, from serving on the Board of Directors and various committees to becoming involved in planning social activities, help ensure a quality of life that contributes to the enjoyment and well-being of our neighbors and ourselves.

Our homes and the environment we have nurtured at Baytree have attracted residents with diverse and considerable talents who participate on various committees and on our HOA Board of Directors. Together, and through our careful selection and supervision of a professional Community Association Manager, we have created and maintained a community of which each of us can be proud.

This is a community in which you can make your contributions in the areas of finance, architectural review, grounds management, clubhouse management, social/recreation, newsletter/communications, and other areas. You can make your interest known in any of these areas by contacting our HOA President, any member of our Board of Directors, or members of any committee.

Our homeowners have obligations. If you have purchased one of two hundred and fifteen homes/villas, you have not only assumed 1/215<sup>th</sup> of the ownership of the common assets, but 1/215<sup>th</sup> of the responsibilities for managing them as well. Costs of maintaining our community are measured in more ways than money. Your maintenance fees cannot adequately substitute for contributions of your time. It is important that we each assume our share of responsibilities. Please volunteer for a working committee of your choice or accept appointments to committees. And when you're not active on a committee or the Board, please support those who are by completing a ballot or proxy when asked, and by attending our Annual Meeting each year in February. Your involvement in sustaining the quality of your community will help preserve that environment in which all of us have invested.

*The Residents' Handbook provides an explanation about what Baytree is and how we operate. The handbook covers some of the provisions of the Baytree legal documents, most of the rules and the architectural standards developed by the Baytree Board of Directors, and other general information.*

Please read this booklet, ask others in your household to read it, and keep it handy for reference. The Appendices contained in the back of this document provide an invaluable resource for residents.

# THE BAYTREE VILLAS HOMEOWNERS' ASSOCIATION (HOA)

The *Baytree Villas Homeowners' Association (HOA)* is a not-for-profit mutual benefit corporation. As such, it allows the HOA to:

- Enter into contracts
- Own and maintain property
- Levy and collect assessments
- Become an employer
- Buy insurance
- Pay taxes
- Borrow money
- Formally agree on rules and authority

As members of Baytree Villas Homeowners' Association, we each have the benefit of sharing common facilities that otherwise would be expensive to own. Sharing common facilities provides a better quality of life for everyone in our community.

## **BOARD OF DIRECTORS**

The Board of Directors is made up of five unpaid volunteers who direct our affairs. They meet frequently to review and make decisions about our finances, common area maintenance, home/villa lawn and landscaping, legal issues, committee proposals, and countless issues affecting all of us. They work with a professional community association manager who is hired by the HOA to manage our affairs. Each February at our Annual Meeting, we elect HOA Board members for two-year terms. If you are an owner, you help decide who our five Board members will be. Generally, Board members have gained experience and knowledge about our Association by having served on one or more committees. Committees are an excellent way to learn how we operate. Our Board of Directors welcomes those who attend its regular meetings and is receptive to ideas and requests. They value your input.

*Please note that our HOA Board elections can affect you much more directly and significantly than most other association or club elections. Our HOA Board is our business management body, managing a budget of many hundreds of thousands of dollars, dealing with serious legal issues, and making decisions affecting the value of our real estate. Our HOA Board of Directors is not a social club. Please, carefully consider who you elect to the Board, and if you decide to become an HOA Board member, serve on it conscientiously.*

Meetings of the Baytree Board of Directors meetings and committee meetings are open to members of the HOA. Please see Addendum #7 for details regarding resident participation at HOA Board Meetings. Board meeting minutes and financial statements are available in the library and through the Baytree HOA website. Changes or additions to our community rules must be approved by the Board.

You are a larger part of Baytree than just a property owner. Your investment in our community, and its continuing success, calls for you to share equally with your neighbors in its management. Though many of us have tremendous demands upon our time, none of us can afford to exempt ourselves from these responsibilities. There is little doubt that neglecting our obligations to the Association and its administration can result in serious consequences for our community.

## **HOA LEGAL DOCUMENTS**

Every Homeowners' Association (HOA) has legal documents. The legal documents are a comprehensive description of both the Homeowners' Association's and owners' rights and responsibilities.

Ultimately, almost every HOA activity is governed or affected by the legal documents. By reading them, you should gain insight into why the Board or a committee may act in a particular way, or why we have specific rules and obligations which must be enforced. If you are an owner, it will help prepare you for taking your turn on the Board of Directors or a committee.

The contents of the Baytree legal documents, rules, and standards set by the Board of Directors, and this Residents' Handbook are subordinate to the codes and ordinances of the City of Tavares, laws of the State of Florida, and Federal law. In the event of a conflict, the governmental codes, ordinances and laws take precedence. Similarly, the rules and standards set by the HOA Board must be consistent with the Baytree legal documents. If there is a conflict, the legal documents will prevail.

***The legal documents of Baytree Villas Homeowners' Association include:***

- ***the Third Amended and Restated Declaration of Covenants, Conditions, and Restrictions dated February 2, 2024 (which also contains the Baytree Articles of Incorporation and the Baytree Bylaws),***
- ***the Resale Capital Assessment Amendment dated February 4, 2025,***
- ***numerous references to Chapter 720 of the statutes which govern Florida Homeowners' Associations, and***
- ***any additional amendments which may be passed by the HOA and recorded in the public records of Lake County Florida.***

The above Baytree documents may be found in the Baytree library or viewed on the Baytree HOA website. The provisions of these documents can only be changed by an affirmative vote of a majority of the members either present or by proxy at a duly noticed meeting, and they must comply with Florida Statutes, Chapter 720.

## **STANDARDS, RULES AND RESTRICTIONS**

The legal documents provide authority to our HOA Board of Directors to establish and enforce rules and standards for Baytree members and their guests. The Board of Directors can modify, add to, or delete rules or standards that have been established by previous HOA Boards.

Rules and restrictions passed by our Board of Directors are to protect the common areas and Baytree as a whole, while allowing an orderly use of our assets. Architectural standards are set by the Board to preserve the appearance and character of Baytree. Rules and architectural standards may be changed by a majority vote of the Board of Directors, as long as they are in compliance with our legal documents.

See a partial list of our general restrictions in Addendum #5 of this handbook. Consult our legal documents for more specific information and additional restrictions. Architectural standards and rules may be found in Addendum #3 of this handbook.

## **BOARD POLICIES AND PROCEDURES**

The Board of Directors may find it necessary to clarify or supplement existing rules. If necessary, the Board may issue Rules, Policies, Procedures and Guidelines in addition to our existing governing documents. See the Addenda in this handbook for current Rules, Policies, Procedures, and Guidelines or check them on our Baytree HOA website.

### **NOTE 1: For changes in Rules (restrictions) or Policies:**

- 1) Notice will be sent to community of proposed change,
- 2) Vote by Board will be held,
- 3) Board Approved Rule Change notice will be sent to community
- 4) Rules and Policies will be recorded in Lake County

### **NOTE 2: For new Procedures and Guidelines:**

- 1) Notice of new procedures, guidelines, and date adopted will be sent to residents,
- 2) Operational requirements will be documented.

## **ABOUT NEIGHBORS AND RULES VIOLATIONS**

In spite of the benefits of our living environment, some of our habits and behavior may affect others. By agreeing to a body of rules, we can minimize problems. But more importantly, we all must exercise tolerance and consideration for our neighbors. If you ever feel you need relief from something your neighbor does, please approach and discuss it with him or her. Usually, you will find your neighbor very understanding and cooperative. And if you are the one approached, please be as cooperative as you can. A homeowners' association has obligations and considerable powers to enforce rules compliance. Exercising those powers can be much more unpleasant than cooperating to resolve your problem. Only as a last resort should you contact our management company.

You probably have seen a neighborhood where one home was neglected, which affected the appearance (and property values) of nearby residences. Our legal documents protect our property values by requiring each of us to maintain the exterior of our homes in an attractive condition. Please keep the outside of your home clear of debris and do not store materials where they will be visible from the outside.

All villas and some stand-alone homes are accessed by a frontage drive. Parking on the frontage drive is not permitted, except temporarily for guests or service vehicles. Access to a homeowner's driveway must not be blocked. Driveways are reserved for use by the homeowner.

## **RESIDENTS' HANDBOOK SUPPLEMENTS AND UPDATES**

You may receive notices, from time to time, of changes or additions to our Residents' Handbook. Please save any such notices and supplements and place them in your handbook. Should you move, please leave the legal documents, the Residents' Handbook and any supplements for the new resident.

## **COMMITTEES and COMMITTEE CHARTERS**

Committees are the means by which you can get involved and make things happen at Baytree. Some committees are permanent (standing) such as the Finance Committee and the Landscape Committee. Others are more transient (ad hoc). For example, the Nominating Committee (appointed to nominate qualified candidates for election to the Board of Directors) serves only once a year. Committees may be added as necessary. A nice thing about living in Baytree is that we really do govern ourselves. You are part of us. If you have an idea for a new club or group, you can start it, or you can join others in existing committees. To explore existing committees and learn more, check out the Baytree HOA website ([baytreetavares.org](http://baytreetavares.org)). Committee charters have been developed for most of our committees, and the charters provide details about how committee members interface with the community and the HOA Board. Committees need charters. Committee Charters:

- 1) help volunteers understand what they are expected to accomplish,
- 2) avoid misunderstandings and to avoid committee activity not intended by our Board, and
- 3) ensure consistency and continuity as the makeup of a committee changes year-to-year.

*(See Addendum #9 at the end of this handbook for existing approved Committee Charters).*

## **COMMON AREAS**

When you purchased your villa/home, you also purchased a proportionate interest in the common areas such as the clubhouse, pool, spa, ponds, trees, greenspace, exterior lighting and landscaping, and other physical assets. Part of the maintenance fee you pay each month goes toward maintenance of facilities and replacement of reserve funds for some of these assets, as well as lawn and irrigation care. Common areas are protected by the legal documents and the Board of Directors. These rules for use of common areas are for both residents and their guests. Residents are not allowed to make any changes to common areas without the approval of the Board of Directors.



## **THE CLUBHOUSE**

The Baytree Clubhouse is for the exclusive use of Baytree overnight or out-of-town residents and their guests. The previous owner of your home should have given you a key and a key fob to the clubhouse when you purchased your home. The facility consists of a main room/dining room, fitness/exercise room, pool and spa, and the Baytree library. If you use these areas, please remember to turn off any lights, fans, air/heat before you leave, and lock the door behind you.

### **Reservations:**

The *main room* may be reserved by Baytree residents on a first come basis for both Baytree Social Functions (open to all Baytree residents and their guests) and for Private Functions (open to the resident reserving the facility and his/her guests only).

Reservations will be taken up to sixty days in advance for Private Functions. There is no time restriction for making reservations for a Baytree Social Function or committee meeting. The Clubhouse Reservation Chairman will keep a calendar listing all functions to be held in the clubhouse and the Baytree Library, including both recurring events and special events. The *Exercise/Fitness Center* may not be reserved. The *pool* may not be reserved, and no private pool parties will be permitted.

Reservations can be made only for normal clubhouse hours. The use of the clubhouse must be for social activities only. No non-Baytree business meetings, club meetings, sales meetings, or meetings intended for money-making purposes will be allowed. However, with prior Board approval, fund-raisers which benefit the Baytree community may be allowed. See the Social Committee Charter in Addendum #9F at the end of this handbook for additional information.

All tables and chairs, as well as other equipment and utensils, must remain in the building at all times. There will be **no** policy for renting or borrowing any equipment or utensils. At **no** time is any clubhouse equipment to be removed from the Baytree clubhouse.

Your key to this facility must NOT be given to non-residents for their use while you are away, unless they are living in your home while you are gone.

## **CLUBHOUSE MAIN ROOM**

Our clubhouse is here for all of us to enjoy. Thank you for helping to keep it clean, pleasant and in good repair. You must sign-up with the Clubhouse Reservation Chairman to reserve the main room or library for use. An individual making a reservation shall be responsible for rules compliance by any and all persons using the clubhouse during the time of the reservation. Please see Clubhouse Rules for Use of Main Room in the Social Committee Charter under Addendum #9F. This information may also be found on our Baytree HOA website.

## **POOL AND SPA**

The pool and spa, and all related equipment, are operated for the benefit of residents and their guests in accordance with appropriate Florida codes mandated both by Florida law and our insurance carrier.

During the winter months, approximately December through March, the pool is heated with pool water temperature set to maintain 86 degrees. During cold spells, the heaters may not be able to maintain the desired heat and may be turned adjusted until it is warm enough to operate as desired. During such periods, the pool water temperature often drops and remains in the 60's for a week or more before recovery. During the warmer and sunnier months of the year, the pool water temperature often exceeds 86 degrees F.

In accordance with Baytree policy, spa water temperature is set year-round not to exceed 102 degrees F. (104 degrees F is maximum water temperature allowed by code.)

**WARNING:** No lifeguard is on duty. Swim at your own risk. Prolonged spa use may be hazardous for children under 12, people with heart or high blood pressure problems or when consuming alcohol. Use these facilities at your own risk. No alcohol is allowed in the pool or spa area.

*You must obey the pool and spa rules. See Addendum #4 for a list of Pool and Spa Rules.*

The Clubhouse Facilities Manager, in conjunction with the Pool and Spa technician, oversees the pool and spa, the pump house, and the pool deck, furniture, and fence. Questions, suggestions, complaints and appreciation should be directed to these people. The Clubhouse Facility Manager and Board Liaison are listed on the clubhouse bulletin board and posted on our Baytree HOA website.

## **THE BAYTREE LIBRARY**

The Baytree Library is run on the honor system; no check-out is necessary. Take note of any rules/guidelines posted in the library. When you return books, leave them in the designated area just inside the door. Many of our books have been donated by our residents. If you would like to donate books, leave them just inside the door, and they will be stamped and shelved. Any duplicates that you donate will be re-donated locally or sold during fund-raising activities. When you leave the library, please turn off lights, make sure thermostat is set to 78 degrees, and lock the door. If you need additional information about our Baytree Library, contact our volunteer Baytree Librarian.

## **THE BAYTREE FITNESS CENTER**

*Please review the Fitness Center Rules, Addendum #4A, prior to using this facility.*

The fitness center is strictly for the use of Baytree residents and guests. Guests under the age of eighteen must be accompanied by an adult when using the fitness center.

In the interest of economy, please utilize only the level of utilities required for comfort. All lights, and fans must be turned off and the air conditioners must be set to 80 degrees when you leave. Don't forget to lock the door if the room is not occupied. Any questions about the fitness room or equipment should be directed to the person indicated on the notice in the fitness room or to the Baytree Clubhouse Board Liaison.

### **CLUBHOUSE FACILITY MANAGEMENT**

Our clubhouse is here for all of us to enjoy. Thank you for helping to keep it clean, pleasant, and in good repair.

In the clubhouse *Main Room*, there are two air conditioning units, each with its own thermostat. Air conditioners are to be left at 80 degrees when the facility is not being used. Also, the *Main Room* has four rows of ceiling fans (two per row), with each row controlled by a separate switch. The electric lights for the *Main Room* are on separate switches. In the interest of economy, please utilize only the level of utilities required for comfort. Air conditioning and fans should not be turned on more than one hour prior to the scheduled function. All lights and fans must be turned off and air conditioners re-set when you leave.

Our Clubhouse Facility is kept in good working order by volunteer residents. We have a Clubhouse Facility Management Charter under Addendum #9B and a volunteer Clubhouse Facility Manager. Clubhouse facility concerns should be referred to the Clubhouse Facility Manager or the Clubhouse Facility Management Board Liaison.

### **COMMUNITY LANDSCAPING (excluding Greenspace)**

The Landscape Committee monitors Baytree common properties and residential exterior landscaping maintenance, as well as the performance of our association's landscaping contractors in maintaining our high standards. Items included in the Landscape Committee purview include lawns, our Memorial Pond, sprinkler systems, exterior lighting, trees and shrubs, entrance landscaping, clubhouse landscaping, and other physical assets.

If you own your home/villa, first determine whether maintenance of any item needing repair belongs to you or to the HOA. Contact your Landscape Committee regarding needed repairs that are located on common property.

The HOA contracts with a Landscape company to maintain basic exterior landscaping maintenance. The contract specifies what services will be performed, based on a negotiated cost. Residents must understand that our landscape company cannot meet each individual resident's request for personalized landscape maintenance. The landscape company must comply with their contract with our Baytree HOA. Remember, our Landscape contractor is NOT your personal gardener. The workers are given specific tasks and dates for their work in our community, per our contract with them. The Landscape Committee oversees the contracted work and contract compliance. See a list of HOA and Resident responsibilities in Addendum #6, Maintenance of Grounds Policy.

Per the Baytree contract with our landscape company, to expedite potential landscape and irrigation problems on your property, an on-line portal has been established which can be used by residents to directly contact our landscape company with their landscape and irrigation concerns. Our landscape company tries to complete emergency repairs quickly. However, our landscape company is not in the community every day, so small repairs of a non-emergency nature may take longer to repair. Resident concerns and questions should be brought to the Landscape Committee if they feel that the landscape company is not responsive or if the problem is an emergency.

This is our neighborhood. We own our common areas and are responsible for keeping them clean. If you see trash that someone has discarded, please help your neighbors by picking it up and putting it into your trash. Let's all help.

## **OUR COMMUNITY GREENSPACE**

The Greenspace Management Committee was appointed to oversee development and maintenance of our Baytree Greenspace common area. The Greenspace common area consists of approximately fifty-seven (57) acres that surrounds much of our Baytree community. This land was purchased by the Baytree Community on February 26, 2021, for the use of all Baytree residents.

The Greenspace Management Committee monitors and oversees the Baytree Greenspace area, including the ponds on the Greenspace, to properly maintain the property. The Greenspace Management Board Liaison will review applications for residents' use and/or development of the property, and will make recommendations to the Board, which the Board may approve or deny. Recommendations to the Board must include estimated cost and resident impacts.

For more detailed information about our Greenspace, see the Greenspace Management Committee Charter, Addendum #9D, near the end of this document.

## **GENERAL INFORMATION**

### **CONTACTS**

Occasionally, you may have a question or problem with which you need assistance. The Baytree Residents' telephone directory contains not only residents' phone numbers but also numbers for our Management Company and members of our Board of Directors and Committee leaders. Phone numbers and email addresses may also be found in the monthly Baytree Scene newsletter, our Baytree Reminders, and on our HOA website.

### **FEES and PAYMENTS**

Please make your maintenance fee payments promptly. Our property management company processes these fees for our HOA. Payment can be made by coupon or by an automatic draft withdrawal from your checking account. Please contact our management

company if you have not made arrangements to initiate your maintenance fee payments. The following summarizes our Baytree Delinquency and Collection Policies for homeowners:

- Your monthly assessment is due on the first day of the month and is delinquent if not received by the 15th.
- In case of delinquencies, payments received are applied to the earliest accrued assessments first.
- Any delinquent assessment shall bear interest from the delinquency date at the maximum rate allowable by law, plus fees, and the HOA may bring an action at law against the owner or foreclose a lien against the property.

For more detail, please see our Baytree HOA legal documents.

## **CRIME PREVENTION**

It is helpful to know the people who live around us, so we can keep an eye out for each other. So, try to meet neighbors you don't already know. You may wish to have an arrangement with a couple of neighbors you know and trust to exchange house keys for emergencies, to call the police should an alarm sound, or should a suspicious person appear to loiter around your or your neighbor's home. There is no soliciting allowed in Baytree. If you see a stranger, you might ask if they need directions. Someone who has ill intentions will know they have been noticed and are subject to being recognized. Your awareness and healthy suspicion are essential to our keeping our neighborhood safe. Report burglaries, thefts, break-ins, vandalism, violence, abuse to facilities, etc., directly to the police. When life or property is in immediate peril, dial 911. For less urgent matters, call the Tavares police department at its non-emergency number listed in our Baytree Residential Telephone Directory.

Unless you can contain a fire quickly, dial 911. Accidents happen, but if you delay out of fear or embarrassment, damage can be swift and extensive, and we may all be affected. We have fire risk at Baytree. Therefore, we have special responsibilities to each other to minimize that risk. Test your smoke alarms periodically. Many of us have smoke alarms that are not connected to any centralized monitoring station. So, if you hear a neighbor's alarm sound for more than a few seconds, please investigate. Keep at least two fire extinguishers in your home with one in the kitchen and at least one more in another strategic location. They should be suitable for extinguishing all types of fires, including oil and grease fires. If you see any fire hazard, please call any Board member or our Property Manager.

Other safety measures are also in place to protect our common property. There are security cameras at our clubhouse that are monitored by our Clubhouse Facilities Management Manager. Residents are issued both keys and electronic key fobs to gain entrance to our clubhouse facilities. Please keep your keys and fobs in a secure place. If you lose your keys or fobs, please notify a Board member immediately. Key fobs are numbered and can be removed from our security system. If your fob doesn't work, please contact a Board member to receive a new fob and to remove your old one from our security system. Do NOT give your keys or fobs to anyone else. You are responsible to keep them safe and secure.

## **COMMUNITY EMERGENCIES AND THE BAYTREE CERT TEAM**

In the event of a community emergency, such as a natural or man-made disaster, it is possible that Baytree residents could be without water and electricity for several days. Each resident should have a personal plan that takes this into account.

Baytree maintains a Community Emergency Response Team (CERT) with volunteers trained to prepare for the types of disasters that our community may face. CERT members learn how to safely respond to manmade and natural hazards, help organize basic disaster response, and promote preparedness by hosting and participating in community events. Please consider volunteering to serve on this important committee.

The Baytree CERT team is responsible for assisting the Baytree Community in an emergency situation (such as a tornado, hurricane, extended power outage, etc.) until city, county, and state emergency responders are able to render aid to the residents. Please be sure that your phone number is correct in the Baytree telephone directory.

When there is an emergency, the CERT volunteers will:

- Coordinate with city, county, and state emergency responders
- Keep residents informed
- Help affected residents contact family or other emergency contacts
- Provide community damage assessment
- Render aid to those injured
- Locate and turn off utilities if safe to do so
- Extinguish small fires
- Conduct light search and rescue operations
- Help disaster survivors cope with their emotional stressors

## **BAYTREE FUNDRAISERS**

Fundraisers may be organized for a specific project that directly benefits the Baytree community. This could include initiatives such as improving common areas, enhancing security measures, or other projects that contribute to the residents' well-being or the development of Baytree.

Before any fundraising activity can commence, it must receive formal approval from the HOA Board. This step is crucial to ensure that the fundraiser aligns with the community's values and regulations. The Board will review the proposed project, goals, and resource requirements, and will provide feedback or approval accordingly.

## **COMMUNITY COMMUNICATIONS**

Our Baytree community has several forms of communication to keep residents informed and up to date:

- The *Baytree Clubhouse Bulletin Board* is a central location for posted information available to all residents. The bulletin board contains organization information,

group and community activities, committee contact information, daily activity calendar for the month, and other useful information.

- The *Baytree Residents' Telephone Directory* is updated and distributed to residents once each year. Changes made during the year are published in the monthly Baytree Scene newsletter and are also available on our HOA website.
- The *Baytree Residents' Picture Directory* is available on our website. Any resident wishing to be included in the picture directory can have their photo taken or submit a photo for inclusion in the directory.
- The *Baytree Scene newsletter* is compiled and printed each month to keep residents abreast of current social events, residential activity, important community information, community reminders, important contact information, telephone directory updates, and a community calendar of events. The calendar of events is also printed in a large format and posted monthly on the bulletin board at the clubhouse. An electronic version of the newsletter is also available for residents who provide email addresses.
- The *Baytree Reminders (miscellaneous community information)* is updated as needed and the file is distributed with the electronic version of the newsletter each month. A copy is posted on the Clubhouse Bulletin Board and also on our Baytree HOA website.
- The *Baytree HOA website* ([baytreetavares.org](http://baytreetavares.org)) provides information about our community in an easily accessible format. All legal documents, the Residents' Handbook, HOA Board information, Committee information, Board meeting minutes, Baytree Bulletins, Baytree Scene newsletter for each month, flood zone maps, and more are available to all Baytree residents. Most information on the site is password protected. Residents must contact the Baytree webmaster to obtain the password.
- *Baytree Bulletins* are electronic messages sent to all residents who have email. The bulletins provide nearly immediate access to current information that may be important to residents.
- The *Baytree Facebook Group* is available only to current Baytree residents. Any resident who has a Facebook account can request to be added to the Baytree Facebook group. The group is for community information sharing. Pictures of current social activities and other community events are often posted. In order to keep the group safe and secure, no friends or relatives will be admitted to the group and no advertising is allowed. This group is for Baytree residents only.

## YOUR HOME

### **RENTING YOUR HOME**

See the Baytree HOA *Sales and Lease Policy, Addendum #2*, at the back of this handbook. Also, refer to *Addendum #1, Age Restriction Policy* prior to renting your home.

Per our legal documents, the number of units rented or leased except for seasonal rentals are limited to 5% of the total units in Baytree. No home may be leased more than two (2) times in a calendar year or for a period of less than two (2) months.

Prior to finalizing a lease of your home/villa, you **MUST** receive approval from the HOA. If you lease your villa/home to someone, you are obligated to deliver to your lessee or renter a copy of the HOA rules prior to their occupancy.

The tenant, as part of the lease agreement, is subject to all Baytree rules and regulations. Any lease or rental agreement should include the following notice: "The terms of this (lease or rental) agreement are subject to the provisions of the rules and legal documents of Baytree Homeowners' Association and any applicable agreements between the Association and any of the Federal Agencies. Any failure by the lessee or renter to comply with the rules or terms of those documents shall be a default under this (lease or rental) agreement."

You should understand that, should a renter violate rules or provisions of the legal documents, the HOA has no direct legal recourse against the renter, *but must pursue enforcement against you, the owner*. That is why preventing problems and close supervision of your property is so important.

The sale/lease questionnaire must be sent to our management company before the lease is finalized. A copy of the sale/lease questionnaire is available in the Baytree Library and on our Baytree HOA website.

Many homeowners' home insurance policies do not cover homes/villas when they are being rented. If you do not notify your insurance company that you have rented your home, you run the risk of losing coverage in case of a loss.

If you are a renter of a villa/home, you are obligated to follow the provisions of the Baytree legal documents and the provisions of this Residents' Handbook. Violation of these rules may be a default under your lease, so you should familiarize yourself with all the rules contained in the handbook.

## **SELLING YOUR HOME**

See the Baytree HOA Sales and Lease Procedures, Addendum #2, at the back of this handbook. Also, refer to Addendum #1, Age Restriction Policy, prior to selling your home.

When you have decided to sell or lease your home or villa, notify the Board of Directors before you put it on the market. A Board member can then help you with the proper notifications and rules associated with our 55+ community. Prior to finalizing the sale of your home/villa, the sale to the new owner must be approved by the Homeowners' Association. To secure approval, the sales/lease questionnaire must be sent to our management company. A copy of the questionnaire may be obtained from our management company and also is available on our Baytree HOA website.

Please ensure that your buyer receives the required copies of the legal documents and this Residents' Handbook. You may have other disclosure obligations as well. Consult with your real estate professional or attorney. Most of these documents should be



available from our management company for a copying and clerical charge. They are also available in the Baytree Library and on our Baytree HOA website.

After selling your villa/home, don't forget to leave the key and key fob to the clubhouse, the legal documents, and this Residents' Handbook for your buyer. The HOA is not a legal party to your sales transaction. However, the HOA is usually involved and tries to be helpful in providing requested information to all parties at reasonable fees.

## **INSURANCE**

### *Baytree HOA Insurance:*

The Association maintains a general liability insurance policy, casualty insurance for our common property and facilities, and directors' and officers' liability coverage. However, provisions of policies do change from time to time.

### *Your Personal Homeowner's Insurance:*

Of course, the HOA insurance policy does not cover homes, personal property or liabilities for either the villas or the single-family homes. Each owner shall be required to obtain and maintain adequate insurance of his or her home.

The villas are a Planned Unit Development (PUD). They are NOT condominiums. As such, owners are required in our legal documents to have insurance for the exterior of the unit as well as the interior. Please discuss this issue with your insurance agent when purchasing insurance.

Villa owners are asked to provide proof of insurance to the Villa Committee or the management company when requested.

*Please refer to our Covenants, Article VII, Section 7.2(b) for detail on insurance requirements.*

Many homeowners' home insurance policies do not cover homes/villas when they are being rented. If you do not notify your insurance company that you have rented your home, you run the risk of losing coverage in case of a loss.

## **HOUSE AND VILLA WASHING**

HOA fees include house and villa washing for each residence in Baytree once each year. Homeowners are responsible for scheduling the date for this service. The HOA will be billed for the cost, but you must be in residence to sign a ticket that the residence was indeed washed. All villas within a building must coordinate a date to have all units in the building washed on the same day. If, in addition to washing your house/villa, you want sidewalks, driveways, patios, birdcage screens, etc. washed, payment for those services is the responsibility of each homeowner. The HOA only pays only for the washing of your home or villa building.

# **ARCHITECTURAL STANDARDS AND RULES**

## **AUTHORITY AND CREATION OF STANDARDS**

As a Homeowner in Baytree you agreed to the terms of the HOA legal documents when you purchased your home. In addition, the Board has adopted additional architectural standards and rules. The Baytree *Declaration of Covenants, Conditions, and Restrictions* establishes a legal framework for Baytree architectural standards and provides authority to the Board of Directors to formulate or change rules and architectural standards.

Baytree's architectural standards have been developed with the following objectives:

- Preserving the uniformity and aesthetic appeal of the neighborhood
- Protecting and potentially increasing the property values within the community.
- Ensuring structural integrity and safety of proposed modifications, thus helping to prevent potentially hazardous constructions that could put homeowners and their neighbors at risk.
- Fostering open communication and consideration among neighbors regarding architectural changes and helping to promote a more harmonious living environment.
- Protecting the Owner and the HOA by providing a clear set of guidelines and expectations, and helping homeowners make informed decisions about their property modifications.
- Ensuring that all changes comply with the governing documents, reducing the risk of disputes and potential legal issues.

The Baytree Architectural Review Committee (ARC) uses these architectural standards when evaluating applications. Although normally proposed by members of the ARC, any HOA member may propose a new architectural standard to the ARC, consistent with our architectural standards objectives through the process described below.

## **THE ARCHITECTURAL REVIEW COMMITTEE (ARC) PROCESS**

To ensure that the ARC Review process and establishment of standards are applied openly, fairly, and uniformly:

- Standards are created within a public process. They are introduced, discussed, and voted upon at open Architectural Review Committee and Board meetings.
- A majority vote of the Board of Directors is required to change standards.
- The Board of Directors can vote to change a rule previously passed by the Board.
- Membership approval is required to change covenants and restrictions imposed by our homeowners' association legal documents.
- Decisions made by the ARC may be appealed to the Board in writing within 30 days following the final decision of the ARC.

## **THE ARCHITECTURAL REVIEW COMMITTEE AND YOU**

Our Board appoints volunteer members to our Architectural Review Committee. The ARC helps to develop and implement standards, procedures, and policies that govern changes that members may make to their property. ARC members review proposed plans, and approve or deny them, based on compliance with our architectural standards and rules. The ARC also assists homeowners and makes recommendations to help bring plans into compliance.

State law requires that meetings of the Architectural Review Committee must be open to *all* members of the homeowners' association. The dates and times of these meetings must be posted at least 48 hours in advance.

Before contemplating any exterior property modification, residents are encouraged to familiarize themselves with the *Architectural Rules Addendum #3* to this Residents' Handbook.

If you are a *villa owner* in Baytree, you have a shared responsibility with the other owners in your building for maintaining and, when required, replacing your roof. Addendum #8 provides guidelines for coordinating with your neighbors when replacing your roof.

## **APPLYING FOR APPROVAL**

Approval from the Architectural Review Committee is required for any exterior addition or modification, including reconstruction of an improvement that had been removed, dismantled or destroyed. Please refer to the Architectural Rules Addendum #3 to this Handbook for specific requirements.

1. Obtain a copy of the **Architectural Review Application**. Copies of this form are on file in the Baytree library or can be downloaded from our website [baytreetavares.org](http://baytreetavares.org).
2. For patios and sidewalks or structural changes make a scale drawing(s) of your proposed project. Include top (plan) and side (elevation) views as necessary to clearly establish 'proposed' location, elevation and construction detail of your modification. Your drawing should also include existing structures and boundaries where necessary to indicate relative location. The type of construction materials to be used must also be included.
3. Submit copies of your completed application and drawings to the Architectural Review Committee.
4. You will receive a copy of your application with the bottom portion completed by a member of the Architectural Review Committee. This copy serves as your receipt and documents the date your application was received.
5. Every effort will be made by the ARC to approve or deny your plans within 30 days of the receipt of a completed application. Upon review of the application, you will be notified of the disposition of the application.
6. If denied you may modify your plans to conform to the Baytree architectural standards and resubmit it. Or you may appeal the ARC decision in writing to the

Board of Directors within 30 days of the decision. If you feel that special circumstances exist that provide a compelling reason why a standard should not apply in a specific case, or if a standard does not exist, you may request that a variance be granted by the Board, or that the Board approve a new standard. The Board's decision on the application is final.

7. After final approval, you have one year in which to complete construction of your improvements, conforming to any conditions the ARC, Board and/or City may have imposed.
8. The Architectural Review Committee may review the finished project to confirm that your improvement complies with your approved plan. You must correct any deficiencies as determined by the ARC. You are responsible for upkeep and maintenance of the improvement within acceptable standards as determined by the ARC and Board.

It is perfectly acceptable for a member who wishes to make a non-standard improvement or change to propose a new standard for consideration via an ARC application. A well-considered, thoughtful, written proposal, consistent with our Baytree Architectural Standards may shorten the time needed for the ARC to refine, and the Board to approve, a new standard that applies to your project.

**Approval is important.** Making a modification without ARC approval may result in changes having to be undone at the HOA member's expense. Other HOA actions for non-compliance include, but are not limited to, filing a notice of non-conformance that may affect the salability of the property, with filing/clerical fees assessed to the homeowner, and injunctive relief, with the homeowners paying attorney's fees and court costs.

## **Baytree Homeowners Association**

### **ADDENDA TO THE BAYTREE RESIDENTS' HANDBOOK**

#### **RULES and POLICIES (Recorded)**

		Page
Age Restriction Policy	Addendum #1	19
Baytree HOA Sales and Lease Policy	Addendum #2	20
Architectural Rules and Restrictions	Addendum #3	21
Pool and Spa Rules	Addendum #4	25
Baytree Fitness Center Rules	Addendum #4A	26
General Restrictions Summary	Addendum #5	27
Landscape Policy on Maintenance of Grounds	Addendum #6	30

#### **PROCEDURES and GUIDELINES**

Resident Participation at HOA Board Meetings	Addendum #7	32
Villa Roof Process	Addendum #8	35
Committee Charters - Policies and Procedures	Addendum #9	37
Architectural Review Committee (ARC) Charter	Addendum #9A	
Clubhouse Facility Management Committee Charter	Addendum #9B	
Communications Committee Charter	Addendum #9C	
Greenspace Management Committee Charter	Addendum #9D	
Landscape Committee Charter	Addendum #9E	
Social Committee Charter	Addendum #9F	
Social Committee Procedures		
Villa Committee Charter	Addendum #9G	

**NOTE: All addenda included in this document have been approved by the Baytree HOA Board. Additional addenda may be added as required.**

## **Baytree Homeowners Association**

### **Addendum #1: Baytree Villas HOA Age Restriction Policy**

HOPA, the Housing for Older Persons Act, provided rules for 55 plus communities. Eighty percent (80%) of the units must be occupied by at least one person 55 years of age or older. The community must demonstrate an intent to provide housing for persons 55 years of age or older. The community may also impose more stringent age restrictions.

Baytree's occupancy rules are found in our Covenants, Article VII General Restrictions, Section 10 Occupancy.

Under our current legal documents, the minimum age for Baytree is 40 years old if cohabiting with someone 55 years of age or older. Minors are prohibited from living in Baytree.

Baytree has legally and historically denied new resident applications (sale or lease) based on age being less than 55. The Board of Directors has the authority to grant waivers and publish guidelines for granting of waivers. However, no exception may be granted that allows minors or that jeopardizes compliance with the 80% occupancy requirement for 55 plus communities. Following are the situations for which waivers **MAY** be granted.

- A buyer will be 55 within a year of the property purchase. This exception does not apply to the lessee of a rental property.
- Property has been transferred to an immediate family member due to health or death of current resident.
- The purchaser is 55 or over with a spouse or companion who is at least 40, or with a dependent adult child.
- A caregiver that must live with a homeowner who is 55 or older for the homeowner to receive proper care.

Approved by Baytree Villas HOA Board of Directors 02/27/2023

## Baytree Homeowners' Association

### Addendum #2: Baytree HOA Sales and Lease Policy

**NOTE:** *Any owner who plans to sell or lease their property must contact the HOA prior to any sale or lease.*

1. All sales and leases are screened for age so that we can maintain our 55+ community status per HOPA. Homeowners and lessees must have at least one resident who is 55+. Additional residents in the household must be at least 40. The Board may consider a waiver for occupants between ages 18 and 40 as long as at least one occupant is 55 or older. No residents are allowed to live in Baytree who are younger than 18 years of age.
  - Following are the situations for which waivers **MAY** be granted.
    - A buyer will be 55 within a year of the property purchase. This exception does not apply to the lessee of a rental property.
    - Property has been transferred to an immediate family member due to health or death of current resident.
    - The purchaser is 55 or over with a spouse or companion who is at least 40, or with a dependent adult child.
    - A caregiver that must live with a homeowner who is 55 or older for the homeowner to receive proper care.
2. All sales and leases are screened to assure compliance with our covenants including, but not limited to, resident's age, number of pets and weight of pets, number of vehicles, contact information, and fees.
3. Lessees and lessors must comply with all lease dates and restrictions as stated in our governing documents.
4. All applicants must acknowledge receipt of a list of governing documents and agree to comply with said documents.
5. A copy of each lease should be provided to the HOA.

# **Baytree Homeowners' Association**

## **Addendum #3: ARC Rules**

### **ARCHITECTURAL RULES and RESTRICTIONS**

**Approved 3/26/2025**

To preserve the appearance and character of Baytree, any additions or changes to the exterior of homes and lots must comply with these guidelines and be approved by the ARC BEFORE work begins. The property owner must ensure that all projects conform to applicable zoning and building regulations and codes, and are properly permitted in accordance with state, county, and municipal requirements.

#### **Additions or Changes Requiring Approval:**

- Painting the exterior of your home or exterior doors and windows
- Driveway and sidewalk painting or stenciling
- Roof replacement or repair
- Installation of screen door, storm door, or screen garage doors
- Addition or replacement of exterior doors, windows, awnings, or shutters
- Any structural addition to a detached home, including sunrooms and screen rooms
- Addition or modification of cement or paver patios and sidewalks
- Installation of hurricane shutters or screens
- Cement landscape curbing
- Solar panels
- Flagpoles
- Plantings by residents on common property

#### **Additions or Changes Not Permitted:**

- Structural additions or changes to a Villa
- Window air conditioners
- Unattached structures on property, except for docks and boat hoists on canal front properties
- Storage sheds, pet houses, greenhouses
- Signs (except for customary For Sale / Rent signs), artwork, name plates or letters (other than the original house numbers) on the outside of the structure, except for one wreath and one artwork placed near the front entrance and not permanently attached.
- Security bars on windows and doors
- Visible wiring (other than for utility entrance)
- Fences
- Lawn and garden ornaments, figurines, statues, flags, fountains, etc., except for limited temporary holiday decorations as described below.



**Additions or Changes Permitted Without Approval:**

- Flowerpots on a porch, patio, or landscaped area.
- Temporary holiday decorations displayed between Thanksgiving and January 5<sup>th</sup>, and for 10 days before and 5 days after holidays falling at other times of the year. Holiday decorations may not be placed on the roof or in lawn areas where they could obstruct irrigation or lawn maintenance.
- One American flag or other approved flag attached to the home and not exceeding 4.5 ft. x 6 ft. in size.
- One small satellite dish (e.g. DirecTV or Dish), mounted on the roof. If satisfactory reception is not available from a roof location the homeowner may apply to the ARC for approval of an alternate location.

**Architectural Rules for Detached Homes**

Room additions apart from sunrooms and screened porches

- The exterior must be of the same color and material as the existing home.
- Windows must all be of the same color and material.
- The roof of any addition shall maintain the present pitch of the roof, a drop of six inches for every twelve inches of roof.
- The roof of any addition must be shingled and match the color and type of the existing roof shingles.
- There shall be no extra roof ornamentation except for functional fireplace chimneys, air vents, or standard skylight windows or domes.

Sunrooms and screened porches which are added to the rear of the house

- May be constructed of a different material (e.g. aluminum).
- Should maintain the existing color scheme of the house. Aluminum additions may be white or dark bronze.
- The ARC may require some additions to be the same color as the house in order to assure the new construction does not look "tacked on".
- The roof must be shingled in the same color and material as the house and must have a minimum drop of 2" for every 12" of roof.
- There shall be no extra roof ornamentation except for functional fireplace chimneys, air vents, or standard skylight windows or domes.
- Screen houses are designed for screens only. Any modifications must be approved by the ARC and permitted by the City of Tavares to withstand 120 mph winds. Added roofing material must be shingled in the same color and material as the house.

Exterior:

- Exterior walls and garage doors must maintain the color palette presently used in Baytree. The ARC maintains a palette of approved colors, available to any homeowner upon request. The ARC may consider approval of colors different, but similar to, those in the approved palette.
- Sliding garage screens may be made of white or beige aluminum sections with white, beige, or black screening; dark bronze aluminum sections are also

permitted and must have black screening. Rollup garage screens, white or beige, are also permitted.

- Colors of trim and shutters should be in keeping with the existing decor of Baytree and must be approved by the ARC.
- Roofing shingles must be consistent throughout Baytree. The list of approved shingles is available from the ARC.
- Awnings must be a plain canvas cloth material, solid colors or stripes, maintained in good condition and are only allowed on the rear of the home. When the awnings become worn, they must be replaced or removed. Worn awnings may be removed at the owner's expense after due notice is given.
- Whole house water treatment systems must be placed in the interior of the house.

#### Driveways and Sidewalks

- Stenciled, painted, or sealed driveway and sidewalk surfaces must have a non-skid ingredient. All stenciling and painting must conform to colors and designs typical throughout Baytree. Driveways and sidewalks, including stenciling, must be kept in good condition. Clear sealer is permitted on bare concrete driveways.
- Any added or redesigned sidewalk, path, or landscaping, regardless of composition, must follow the contour of the adjacent ground. Drawings showing location and elevations must be submitted to the ARC for approval.

#### Architectural Rules for Villas

##### Villa Exterior:

- Structural modifications to the exterior of villas are not permitted.
- Exterior stucco walls may be painted and must maintain the color approved for villas. The approved villa color is available from the ARC. All villas in a building must be painted at the same time.
- Replacement windows may have frames of white or dark bronze, and mullions (grids) are optional. However, windows in a single unit that can be seen from a single vantage point near the unit must all be the same color and all with mullions or all without mullions (for example, all windows seen from the front may be dark bronze with mullions while all windows seen from the rear may be white with no mullions). Windows and doors replaced in an aluminum walled lanai must match the color of the lanai structure.
- Overhead garage doors in vinyl sided villas must be painted the approved white or-almond color. Garage doors in stucco villas may also be painted almond, white, or the approved stucco exterior paint color. The approved colors are available from the ARC.
- Sliding garage screens must be made of white or beige aluminum sections with white, beige, or black screening. Roll-up garage screens, white or beige, are also permitted.
- Coach lights may be installed adjacent to the garage door, but all coach lights in a building must be of similar design, color, and size. ARC approval is required.
- Rear patios are limited to 16 ft. wide x 12 ft. deep but may be further limited by easements and property lines.

- No shutters are permitted.
- Awnings MUST be a plain canvas cloth material, solid colors or stripes, maintained in good condition, and are only allowed on the rear of the home. When the awnings become worn, they must be replaced or removed. Worn awnings may be removed at the owner's expense after due notice is given.
- Windows and doors in the rear of the lanai may be replaced with sliding doors if the ARC determines that the adjacent walls support the construction.
- No cement landscape curbing is permitted.
- Stenciled, painted, or sealed driveway and sidewalk surfaces must have a non-skid ingredient. All stenciling and painting must conform to the color scheme approved for villas, which is available from the ARC, and to designs typical throughout Baytree. Driveways and sidewalks, including stenciling, must be kept in good condition. Clear sealer is permitted on bare concrete driveways.
- Driveways cannot be widened.

## **Baytree Homeowners' Association**

### **Addendum #4: Pool and Spa Rules**

#### **Pool and Spa Rules:**

- Use is limited to Baytree residents and their guests.
- Residents are responsible for the behavior of their guests.
- Guests under 16 years of age must be accompanied by an adult.
- No animals in pool, spa or on pool deck
- No food or drink in pool or spa area except water in unbreakable bottles
- Absolutely no alcohol in pool or spa area
- Absolutely NO smoking or vaping.
- Shower before entering pool or spa.
- Children in diapers must wear a swim diaper in the pool.
- Do not allow children who cannot swim to be more than an arm's reach from the supervising adult.
- Pool load: 54 persons
- Spa load: 7 persons
- Pool and Spa hours: 7am to 10pm
- Use of spa is for persons 12 and over. Use by persons under 12 can result in heat shock or drowning.
- Voices, radio, etc. should be kept to a courteous level.
- No running, horseplay, or dangerous behavior is allowed.
- Return pool furniture to its original location.
- Place towels over furniture before using suntan lotions, etc.
- NEVER add soap, bubbles, or other solutions to pool/spa.
- ABSOLUTELY NO DIVING
- Baytree is not responsible for articles left at the pool/spa.

Note: If you notice someone not complying to our Pool and Spa rules, it is the responsibility of Baytree residents to courteously request compliance with the rules. Continued non-compliance should be reported to a Baytree HOA Board member.

Baytree residents are expected to comply with any relevant state or federal policies that may or may not be listed in this document.

**WARNING:** No lifeguard in on duty.

**NOTE:** There is no phone in the clubhouse/ pool area. Please take your cell phone with you in order to contact emergency services should the need arise.

## **Baytree Homeowners' Association**

## **Addendum #4A Baytree Fitness Center Rules**

### **The Baytree Fitness Center**

The Baytree Fitness Center is strictly for use by Baytree residents and their guests. Guests under the age of 18 are not allowed to use this facility. In the interest of economy, please utilize only the level of utilities required for comfort. All lights and fans must be turned off when you leave and the air-conditioner re-set to 80 degrees. Don't forget to lock the door.

### **Baytree Fitness Center Rules**

- Consult your physician before starting any exercise program.
- The Fitness Center is only for use by residents and their guests.
- In the interest of safety, no one under the age of 18 is permitted in the Fitness Center.
- Do not use any equipment unless you are sure how the equipment operates.
- All persons must wear shoes and proper clothing when using the facility.
- All persons using the equipment must provide their own towel to wipe off the equipment after its use.
- No food will be permitted in the Fitness Center - plastic water bottles are permitted.
- If someone else is waiting, please do not use any piece of equipment for more than 30 minutes.
- After use, please turn off equipment.
- Any problems with or damage to any equipment should be reported to the Clubhouse Facilities Manager or Board Liaison in writing immediately.
- Please turn off all lights and set the thermostat back to 80 degrees when leaving if no one else is in the room.
- Removal of any equipment from the Fitness Center is prohibited.

### **NOTE:**

The use of this facility and equipment requires training and proper physical conditioning. This is not a supervised activity. Any resident or guest making use of this facility and equipment shall do so solely at his or her own risk. The Homeowners' Association, its Board, and agents disclaim any and all liability for any injury, disease, or disability of any nature whatsoever arising out of the use, maintenance, manufacture, and construction of this facility and equipment.

## **Baytree Homeowners' Association**

Baytree Villas Homeowners' Association  
Approved as Updated May 2025

## **Addendum #5: General Restrictions**

### **(Partial List)**

***The following restrictions are drawn from our legal documents. This list is not all inclusive of Baytree restrictions. Please review our Covenants and By-laws for additional, more detailed information.***

- **Garage:**

The primary function of a garage is to house automotive vehicles, scooters, and golf carts. The garage cannot be converted to any other use or purpose.

- **Garbage or Recycle Cans:**

No garbage or recycle cans shall be visible from the paved road except on days of pickup. Garbage and recycle cans for each unit are to be kept in the unit's garage except on those days when the garbage is collected.

- **Guests:**

No owner may have guests reside in his or her unit for more than thirty (30) consecutive days without the prior written approval of the Homeowners' Association. All guests must obey the rules and regulations of the HOA, and owners are responsible for the actions of their guests. Please take the time to educate guests before they use our facilities.

- **Maintenance of Lot:**

Each owner is to maintain his/her property so that no trash, rubbish, unlicensed or inoperative vehicles or other items not normally found outside are allowed to accumulate for longer than three (3) days. If any violation continues to exist after five (5) days, a written notice will be sent to the owner. The Board may remove the articles in violation and add all expenses incurred in the removal of the violation to the owner's monthly maintenance fees. See Article VII of our Covenants for more detail.

- **Occupancy:**

Baytree is designed, operated, and maintained for the use and benefit of, and to meet the social and physical needs of persons fifty-five (55) years of age and older. As such, every person who lives on any Lot or in a Unit must be an "Adult" as defined hereafter. For purposes of this paragraph, "Adult" shall mean fifty-five (55) years of age or older, or other person at least forty (40) years of age sharing a residence with a resident fifty-five (55) years of age or older. The Board may adopt and publish guidelines or criteria specifying conditions or requirement for granting waivers, and the decision of the Board respecting requests for waivers shall be binding and final. Health care providers are exempt from age restrictions. Day care for pre-school or school age children either for profit or non-profit is prohibited. Owners are responsible for all acts of their visitors and guests at all times. The Board has the authority to adopt additional rules and regulations governing residents and occupants, including the grant of exceptions and waivers, in compliance with HOPA. See Addendum #1: Age Restriction Policy, as well as Section 8.8 of our Covenants for additional information.

- **Persons Residing in the Unit:**

Each Lot or Unit may be occupied by two (2) two Adults, who reside in the dwelling as permanent residents with not more than one additional person living “as a single household unit.” No owner or organization may use the house as a group home or guest house for more than 2 adults. Baytree is governed by the federal law Housing for Older Persons Act (“HOPA”), and the Association through its Board has the authority to adopt additional rules and regulations governing residents and occupants in compliance with HOPA.

- **Pets and Animals:**

No animals, livestock or poultry of any kind shall be raised, bred or kept on any lot, except a dog, cat or other domestic household pet may be kept, provided it is not kept for commercial purposes. A maximum of two household pets may be kept and any one dog or cat shall not exceed thirty-five (35) pounds in weight. Animals must be confined to the Owner's lot except when being walked, when they must be kept on a leash. It shall be the responsibility of the Owner of a pet to remove animal excrements, attributable to the Owner's pet, from the Owner's Lot, any other Owner's Lot and/or Common Areas. Household pets will not be allowed to annoy other Lot Owners or trespass on their Lots and if a pet becomes a nuisance, the Owner, upon request by the Association, must abate the nuisance. All pets must have every immunization required by law, and specifically must have annual rabies immunizations.

- **Signs:**

No sign of any kind shall be placed upon any Lot or Unit which is visible from the exterior of the Unit, except for one customary and usual “For Sale” sign advertising the Unit for sale or rent.

- **Temporary Structures:**

No structures (temporary or permanent) trailer, tent, shack or other out-buildings are allowed, except as required to facilitate renovations or repairs, which shall not exceed 90 days without prior Board approval.

- **User Restrictions:**

All homes/villas are considered residential property. No commercial or professional enterprise may be conducted.

- **Vehicles:**

A maximum of two (2) vehicles may be kept on any driveway and must be kept within the paved driveway. No machinery, commercial trailer, semi-trailer, nor any truck having a load rating in excess of  $\frac{3}{4}$  ton, shall be parked on any lot or street except for service vehicles located there on a temporary basis while performing a service for the owner. No automobile repairs shall be allowed on a lot except an owner may perform a minor tune up, oil change, or tire change on his personal vehicles. No vehicle shall be parked or kept in any yard. No boats, boat trailers, travel trailers, recreational vehicles, motor homes or similar vehicles shall be kept on any lot except for loading or unloading before or after a trip, not to exceed 12 hours. No vehicles commonly known as three-wheelers,

all-terrain vehicles or off-road motor bikes or dirt bikes shall be operated within the subdivision.

- **Parking:**

The rules for the City of Tavares for the parking of boats, RV's, trailers, etc. on city streets are as follows: You are allowed eight hours to park on the street. After eight hours, you can be fined by the Tavares Code Enforcement Officer. After forty-eight hours, you could be subject to towing by the Tavares Police Department. Property owners may park their recreational vehicles, boats and trailers, etc. in the front driveway, provided it does not extend beyond the confines of the driveway. Such vehicles must be less than ten feet in height. Such parking will be allowed for twelve hours.

- **Parking on Frontage Drives**

All villas and some stand-alone homes are accessed by a frontage drive. Parking on the frontage drive is not permitted, except temporarily for guests or service vehicles. Access to a homeowner's driveway must not be blocked. Driveways are reserved for use by the homeowner.

See our legal documents for additional or more specific information.

## **Baytree Homeowners' Association**



## **Addendum #6: Baytree Landscape Policy on Maintenance of Grounds April 2025**

The following guidelines, drawn from the Covenants, landscape maintenance contracts, and past practice are intended to clarify the Baytree Villas HOA policy for landscape, irrigation, and grounds maintenance. The following applies to Baytree Common Ground, excluding Greenspace. Greenspace requirements are currently handled separately from other common grounds maintenance.

Our Baytree HOA Covenants provide language to assure that our premises, lots, and grounds are maintained in a manner that will sustain our property values and provide a safe environment for our residents. The responsibility for the maintenance of our properties is shared between the HOA and individual property owners.

The HOA contracts with a Landscape company to maintain basic exterior landscaping maintenance. The contract specifies what services will be performed, based on a negotiated cost. Residents must understand that our landscape company cannot meet each individual resident's request for personalized landscape maintenance. The landscape company must comply with their contract with our Baytree HOA. Remember, our Landscape contractor is NOT your personal gardener.

### **Lawn, Shrubbery, and Ornamentals**

#### HOA Responsibilities

- Mowing grass at a frequency to maintain an appropriate height and healthy turf.
- Treating turf for harmful pests when necessary.
- Trimming shrubs and bushes
- Fertilizing turf, shrubs, palms, and ornamentals.
- Spraying with an herbicide for weeds in both turf and ornamental beds.

#### Resident Responsibilities

- New plantings, mulching, removal of dead shrubs, etc., on their lot.
- Assuring that plantings do not obstruct sprinkler heads that irrigate an adjacent area. Such obstructions or plantings may either be removed, trimmed to an acceptable height, or, at the resident's expense, sprinkler heads may be replaced or modified.
- Picking up resident generated yard waste such as clippings, raked leaves, tree and shrub trimmings, etc. Residents shall put resident generated yard waste into their own trash containers for pick up or place waste in front of their homes for routine city pick-up.

### **Irrigation**

#### HOA Responsibilities

- Providing irrigation water and the maintenance of a properly operating irrigation system to support turf.
- Additions or changes to the irrigation system on common ground and contractor-damaged irrigation equipment.

#### Resident Responsibilities

- Additions or changes to the irrigation system on their lots.

- Needed repairs caused by resident-damaged irrigation system.
- Shrubs, bushes, ornamentals, and potted plants requiring frequent watering.

### **Trees**

#### **HOA Responsibilities**

- Trimming of palm trees periodically.
- Trimming hardwood tree branches to a height of 10 feet over all areas subject to mowing or public pedestrian traffic.
- Periodic thinning of hardwood trees on common property to mitigate wind damage.
- Removal of dead, diseased, and fallen trees from common areas.

#### **Resident Responsibilities**

- Removal of dead, diseased, and fallen trees from resident's lot.
- Trimming of hardwood trees on their property

### **Common Ground Plantings and Improvements**

- Alterations, additions, and betterments on common ground must be reviewed by the ARC and approved by the HOA.
- Plantings on common ground must be approved by the Board of Directors.

## **Baytree Homeowners' Association**

## **Addendum #7: Guidelines for Resident Participation at Baytree HOA Board Meetings**

Based on a resident's comments at the September 2023 Baytree HOA Board Meeting, it may be helpful to provide some guidelines for resident participation at our HOA Board Meetings. To assure that we follow the FL Statutes - Chapter 720 for Homeowners' Associations and to assure that our Baytree residents have ample opportunity to share their comments and concerns at our monthly HOA Board meetings, the following Guidelines are established. *This guideline has been updated with more detail based on additional questions and comments at the March 2024 Board Meeting.*

### **Guidelines for Resident Participation at Baytree HOA Board Meetings**

- We believe that maintaining a regular portion of the agenda for membership comment helps to diffuse controversy and problems and permits the Board of Directors to have regular and orderly communications from members of the association. However, the Board meetings are just that – Board Meetings - which are to cover Board business.
- When considering the rules for member participation, the Board must also consider how participation can best be handled in an orderly fashion. Members are free to ask questions or make comments following each Committee report or other Board agenda items, if clarification is needed. Questions and comments should always be limited during the meeting, in consideration of all members present.
- FL 720 allows for members to have 3 minutes of time during a meeting when they request, by petition, to speak during a Board meeting. This Baytree Board does not require members to submit a petition to speak. However, to be included on the agenda, the request must be submitted to the Board Secretary in writing at least 5 days prior to the meeting, so that the item, at the discretion of the Board, may be included on the posted meeting agenda. This is for the benefit of the Board and also for awareness of all residents.
- Following the adjournment of the meeting, all residents are free to participate in open discussion, as has been the practice of this Board.

***The Legal documents from which these guidelines are formed are listed as follows:***

**FL 720.303 – Board Meetings**

## (2) BOARD MEETINGS

(b) Members have the right to attend all meetings of the board. The right to attend such meetings includes the right to speak at such meetings with reference to all **designated** items. **The association may adopt written reasonable rules expanding the right of members to speak and governing the frequency, duration, and other manner of member statements, which rules must be consistent with this paragraph and may include a sign-up sheet for members wishing to speak.** Notwithstanding any other law, meetings between the board or a committee and the association's attorney to discuss proposed or pending litigation or meetings of the board held for the purpose of discussing personnel matters are not required to be open to the members other than directors.

(c) The bylaws shall provide for giving notice to parcel owners and members of all board meetings and, if they do not do so, shall be deemed to provide the following:

1. Notices of all board meetings must be **posted in a conspicuous place** in the community at least 48 hours in advance of a meeting, except in an emergency. In the alternative, if notice is not posted in a conspicuous place in the community, notice of each board meeting must be mailed or delivered to each member at least 7 days before the meeting, except in an emergency. Notwithstanding this general notice requirement, for communities with more than 100 members, **the bylaws may provide for a reasonable alternative to posting or mailing of notice for each board meeting, including publication of notice, provision of a schedule of board meetings, or the conspicuous posting** and repeated broadcasting of the notice on a closed-circuit cable television system serving the homeowners' association.

3. (d) If 20 percent of the total voting interests petition the board to address an item of business, the board shall at its next regular board meeting or at a special meeting of the board, but not later than 60 days after the receipt of the petition, take the petitioned item up on an agenda. The board shall give all members notice of the meeting at which the petitioned item shall be addressed in accordance with the 14-day notice requirement pursuant to subparagraph (c)2. Each member shall have the right to speak for at least 3 minutes on each matter placed on the agenda by petition, provided that the member signs the sign-up sheet, if one is provided, or submits a written request to speak prior to the meeting. Other than addressing the petitioned item at the meeting, the board is not obligated to take any other action requested by the petition.

## 720.306 – Meetings of **Members** (NOT BOARD Meetings)

(6) **RIGHT TO SPEAK**—Members and parcel owners have the right to attend all **membership meetings** and to speak at any meeting with reference to all items opened for discussion or included on the agenda. Notwithstanding any provision to the contrary in the governing documents or any rules adopted by the board or by the membership, a member and a parcel owner have the right to speak for at least 3 minutes on any item. The association may adopt written reasonable rules governing the frequency, duration, and other manner of member and parcel owner statements, which rules must be consistent with this subsection.

## Baytree HOA By-Laws

### Article 5 Meetings of Directors

**5.11 Members Right to Speak.** In accordance with Chapter 720, Florida

Statutes, if 20% of the voting interests petition the Board to address an item of business, the Board shall at its next regular board meeting or at its next special meeting, but not later than 60 days after receipt of the petition, take the petitioned item up on the agenda. Any member shall have the right to speak on a matter placed on the agenda by petition for at least 3 minutes, in accordance with the requirements of Chapter 720.

## **Baytree Homeowners' Association**

## **Addendum #8: Villa Roof Replacement and Repair**

### **August 26, 2024**

The timing and coordination of villa roof replacements has been an issue in our Baytree community for many years. In the past, villa owners sharing a building have coordinated with all other units in their building to replace their roofs at the same time. Concurrent unit roof replacement is ideal for aesthetic consistency and installation efficiencies, but negotiations among the owners in the same building have at times been difficult.

The HOA's previous policy requiring villa roof replacement when the roof reached a certain age was recently determined by our Baytree HOA attorney to be unenforceable, because at this time the HOA has no legal standing to enforce. Legally, the villa roofs are owned by the individual villa owners. However, under our Baytree Architectural Rules, we can require that certain types and color of shingles be used for roof replacement or repair. All Baytree homeowners must submit an ARC form to the Architectural Review Committee in order to have their roof shingle selection approved prior to having their roof replaced.

Increasing homeowner's insurance rates in Florida have exacerbated the problem. According to Florida law, insurance companies may cancel homeowner's insurance coverage if a roof is over 15 years old and an inspection fails to show more than 5 years of remaining life in the roof. Even if the roof inspection determines that the remaining life is over five years, companies can and do raise rates. Many homeowners' premiums have more than doubled over the course of one or two years. Additionally, a potential buyer may not be able to obtain a loan for a home with a 15 or 20-year-old roof. So, there is incentive for the homeowner to replace the roof when it ages to 15 years or older.

Homeowners are faced with a dilemma. Baytree's covenants require homes to carry homeowners' insurance. Insurance rates continue to climb, and insurance companies continue to focus on reducing the age at which roofs must be replaced.

### **What to do when you intend to replace your villa roof**

- 1) Ideally, all villa owners in a building would replace their roofs at the same time. If a villa owner wishes to replace their roof, they are encouraged to contact other villa owners in their building to alert them to the roof replacement. The other homeowners may then decide to coordinate their roof replacement. Working together for a potential group discount provides a cost saving opportunity for each owner, while maintaining the building's structural integrity, aesthetics, and market value for each individual owner's unit.

- 2) When the ARC receives an application from a villa homeowner that they intend to replace their roof, the ARC will also notify the remaining homeowners in the building and further encourage coordination among the villa owners.
- 3) Baytree ARC approval and a city permit are required before work may begin. All roof replacements and repair must be made with shingles that have been approved by the Baytree ARC.

The following recommended process has been successfully used to evaluate roof conditions and to help villa owners coordinate roof replacements.

- 1) If, after a thorough search for an insurer, reasonable insurance cannot be obtained due to the age of a roof, its replacement is strongly recommended.
- 2) When a villa roof reaches the age of fifteen years (or earlier when the villa owners in a villa building agree that an inspection is warranted) the roof should be inspected by a certified roof inspector.
  - a. If the inspector determines that the roof should be replaced at that time, replacement is strongly recommended.
  - b. If there is no insurance trigger and if the inspector determines that the roof will last five years or less, the owners may decide to replace the roof or make any needed minor repairs and postpone replacement. If the roof is not replaced at this time, a follow-up inspection should be scheduled within one year.
  - c. If there is no insurance trigger and if the roof has been determined to have more than five years remaining, a follow up inspection should be scheduled within three years.
- 3) Prior to the replacement of the roof, a villa owner in the affected building should be selected to coordinate the process. It is recommended that a minimum of three bids be obtained from licensed roofers who can furnish proof of liability, property damage, and workmen's compensation insurance. The roofer should also be bonded if any payment is to be made prior to completion of the work. Owners will decide by majority vote which bid to accept.
- 4) All costs incurred in this process, including the cost of inspections, will be borne by the owners of the affected villa units, and will be divided among the units based on the square footage of each unit as shown on the Lake County tax records. Any replacement of plywood, vents, etc., will not be shared but will be the sole responsibility of the owner of the affected unit. Roofing contractors will bill each owner separately, based on these requirements.

## **Baytree Homeowners' Association**

### **Addendum #9: Committee Charters**

Committee Charters for the following committees are included in this addendum:

Addendum #9A	Architectural Review Committee (ARC)
Addendum #9B	Clubhouse Facility Management Committee
Addendum #9C	Communications Committee
Addendum #9D	Greenspace Management Committee, including Greenspace Maintenance
Addendum #9E	Landscape Committee Charter
Addendum #9F	Social Committee Charter, including Social Committee Procedures
Addendum #9G	Villa Committee



## **Baytree Homeowners' Association**

### **Addendum #9: Committee Charters**

Committee Charters for the following committees are included in this addendum:

Addendum #9A	Architectural Review Committee (ARC)
Addendum #9B	Clubhouse Facility Management Committee
Addendum #9C	Communications Committee
Addendum #9D	Greenspace Management Committee, including Greenspace Maintenance
Addendum #9E	Landscape Committee Charter
Addendum #9F	Social Committee Charter, including Social Committee Procedures
Addendum #9G	Villa Committee

# **ARCHITECTURAL REVIEW COMMITTEE (ARC) CHARTER**

## **January 16, 2023**

### **AUTHORITY AND REPORTING**

The Committee draws its authority from the Baytree Bylaws and Covenants, Conditions, and Restrictions of Baytree Villa Homeowners' Association that provide for appointment of committees by the Board of Directors. A member of the Board will be appointed as liaison to the Committee. This is a standing committee. The committee membership shall include a committee leader and a secretary.

### **BACKGROUND**

In a living environment such as ours, the investment each of us has made in our property can be affected by the actions of our neighbors. To protect the desirability and value of our property the Architectural Review Committee (ARC) has been chartered to assure compliance with the restrictions stated in Article VII of our Covenants, Conditions, and Restrictions (CC&Rs), and with additional rules established by the Association.

Based on experience with Case Law, homeowners' associations have been compelled to adopt procedures not unlike those used by city planners, employing objective standards and well-defined procedures for application review.

In protecting our property values, members of our Architectural Review Committee have serious responsibilities. Committee members must be able to divorce themselves from personal and social considerations and evaluate applications objectively relative to our architectural standards.

### **MISSION**

This committee protects our property values by reviewing and then approving or denying homeowners' applications for changes, based upon conformance of the proposed changes to our architectural standards. The committee also educates our residents about our standards and the architectural review process.

### **ACTIVITIES**

1. Hold monthly meetings which are open to all residents, publish notices of the meetings, and record the proceedings.
2. Communicate Baytree architectural standards to the community.
3. Publish required forms and instructions for the ARC process.
4. Receive, record, and evaluate requests from homeowners in a timely manner.
5. Notify treasurer of any budget requirements of the committee.
6. Prepare a monthly report for presentation at Board meetings and provide copies of the report as requested by residents.

7. Interface with other committees (eg. Landscape Committee, Villa Committee, etc.) regarding any activities or issues which might impact or be impacted by our architectural rules.
8. Interface with the City of Tavares and Lake County as needed to assure compliance with local ordinances.

## PROCEDURES

### Application Process

1. The ARC receives a request for exterior modifications from the homeowner.
2. The application is logged, then reviewed by committee members. For expedience, the review may be done via phone calls or emails. At the discretion of the Committee Leader, the review may be deferred to the next full committee meeting for a more in-depth discussion.
3. The request is approved or denied by a majority number of committee members within 30 days of application.
4. Homeowners may appeal a denied request to the Board of Directors.

### Construction Process

1. The ARC will review permit requirements with the homeowner.
2. For major projects, the ARC will periodically inspect the construction and communicate with the homeowner.
3. For all projects the ARC will perform a final inspection to assure compliance with the approved request.

### Violations

1. Exterior modifications made without prior ARC approval are subject to review. The ARC will notify the homeowner to submit an ARC form for the completed modification.
2. If the application is denied, the homeowner must change / remove the modification or submit an appeal to the Board of Directors.

### Architectural Rule Changes

Proposed Architectural Rule changes may be a result of appeals, homeowner requests, or committee requests, and must be approved by the HOA Board of Directors. The ARC will facilitate the documentation, communication, and implementation of these changes.

LIST OF ARC FORMS

Architectural Review Application  
Architectural Review Applications Log

Board Signatures:

Lee Sullivan: President

Lee W. Sullivan

Date

1/16/23

Brook Ladd: Vice President

Brook Ladd

1/16/23

Barbara Fabian: Treasurer

Barbara Fabian

1/18/23

Nancy Rogers: Secretary

Nancy Rogers

1-16-23

Dan Hottle: Director at Large

Dan Hottle

1-16-2023

# **CLUBHOUSE FACILITIES MANAGEMENT COMMITTEE CHARTER**

## **June 20, 2024**

### **AUTHORITY and REPORTING**

This committee draws its authority from the Bylaws and Covenants, Conditions & Restrictions of Baytree Villa Homeowners Association that provide for appointment of subcommittees by the Board of Directors. This is a standing committee. A Board liaison is appointed for this committee.

### **BACKGROUND**

Regardless of the contractors or systems we use to maintain our community clubhouse to the highest standards, we, the members, will always be responsible for the results. The Clubhouse Facilities Management Committee assists by monitoring exterior and interior maintenance of our facilities as well as the performance of our association's maintenance systems. The Clubhouse facilities include the Main Room, Pool Area, Library, Restrooms and Storage Areas, Hallway Areas, as well as all areas that abut the clubhouse (entrance, deck, pool, and spa facilities, etc.).

### **MISSION**

The Clubhouse Facilities Management Committee monitors interior and exterior maintenance of building and contents, as well as the contractual performance of all contractors and maintenance people who maintain the facilities.

### **ACTIVITIES**

Supervise facilities management of the clubhouse through the following:

- Oversee facility cleaning and upkeep, both interior and exterior.
- Perform a weekly walk through of clubhouse facilities, especially following large clubhouse social events.
- Maintain inventory of furnishings, equipment, and supplies.
- Coordinate with Social and other involved groups on any new equipment needs and needed repairs.
- Notify the Board about any extraordinary expense regarding clubhouse equipment and maintenance and obtain permission for any repairs.
- Maintain a list of approved maintenance contractors for existing equipment. Contact contractors to perform maintenance and repairs to equipment due to breakdowns.
- Assure agreement between Clubhouse Facilities Management Board Liaison and Treasurer for purchase of general maintenance items or award of contracts in excess of \$200. Treasurer will contact Board members to review any costs in excess of \$200 that need additional review.
- Obtain and store supplies as necessary (AC filters, light bulbs, painting, and janitorial supplies, paper towels, toilet paper, etc.)

- Advertise, plan, and schedule resident work parties as required for maintenance of facilities.

## PROCEDURES

- Provide a written summary report of planned and completed work at monthly HOA Board meetings. Any planned work over \$200 will require approval by Clubhouse Facilities Management Board Liaison and Board Treasurer. If any items require additional review, the Treasurer may contact the remaining Board members for approval.
- Report expenses (provide receipts) to the HOA Treasurer. Provide input to the Finance Committee for the annual budget.
- Solicit proposals from vendors or contractors for performance of maintenance to the installed equipment and facilities. Work with Contract Committee to make recommendations to the Board for contract awards to vendors based on most cost-effective proposals.
- Coordinate with the Social Committee, other involved parties, Pool Committee, and Board on any maintenance or other work that would impact use of facility.

Board Signatures:

	DATE
Brook Ladd: President <u>Brook Ladd</u>	<u>6/24/24</u>
Marva Stephenson: Vice President <u>Marva Stephenson</u>	<u>6-24-24</u>
Bob Podell: Treasurer <u>Robert M. Podell</u>	<u>6-24-24</u>
Dwight Williams: Secretary <u>Dwight Williams</u>	<u>6/24/24</u>
Catherine Benoit: Director at Large: <u>Cath Benoit</u>	<u>6/24/24</u>

# **COMMUNICATIONS COMMITTEE CHARTER**

## **January 16, 2023**

### **AUTHORITY and REPORTING**

The Committee draws its authority from the Baytree Bylaws and Covenants, Conditions, and Restrictions of Baytree Villa Homeowners' Association that provide for appointment of committees by the Board of Directors. A member of the Board will be appointed as liaison to the Committee. This is a standing committee.

### **BACKGROUND**

The newsletter, bulletins, HOA website and other communication documents are the voice of the HOA and of the Board. Communications to residents is important to provide direct access to as many residents as possible in a timely fashion, to increase community awareness, and to promote understanding within our community.

### **MISSION**

The Communications Committee, acting on behalf of the Homeowners' Association, shall periodically publish a newsletter through which our Board can inform members about HOA affairs, provide notices as required in our governing documents, and further the interest of our community. The committee shall also oversee electronic mail (Baytree Bulletins) content and distribution, as well as content and maintenance of our HOA website. Additionally, the committee will update and publish the community telephone directory, send appropriate emails, maintain the Baytree Facebook group, and maintain the community photo directory.

### **ACTIVITIES**

The Communications Committee shall include such information in the newsletter, electronic bulletins, and website as the Board of Directors shall direct. Additionally, communications may:

1. Serve as a source of information about Board and Committee activities and announcements.
2. Publish notices of meetings for new rules and policies or significant changes to them.
3. Publish other notices as required by our governing documents, Florida State law, and policies.
4. Alert our membership to important issues.
5. Publicly thank volunteers who have made notable contributions.
6. Regularly provide a reference for persons to contact regarding HOA affairs.
7. Provide a bulletin board-style forum for exchange of member's personal and general notices (Baytree Facebook Group).
8. Provide access to Board meeting minutes (Baytree HOA website).
9. Provide calendar of social events.



10. Provide contact information for Board and committee members.
11. Oversee billing for newsletter ads.

## PROCEDURES

1. The annual budget of the Communications Committee may include funds for copy preparation, duplication, mailings, production of special issues, website fees, phone directory printing, and other allocations specifically approved by the Board. This information will be given to the Board treasurer, as much as is known, for the annual budget. Any information regarding payment for ads will also be given to the Board treasurer.
2. The newsletter will be sent to the printing company in a timely fashion. The printing company will send invoices to our Management Company with a copy to the editor of the newsletter.
3. Electronic copies of the newsletter may be delivered at any time prior to the date of the current issue. Paper copies will be delivered by the resident volunteer group as soon as they are received from the printer.
4. The HOA website will be updated with all relevant information as the information becomes available.
5. The paper copy of the Baytree telephone directory will be re-issued annually, following cost approval by the Board. The electronic copy of the telephone directory found on the website will be updated monthly.
6. Baytree Bulletins will be sent via email to all residents who have provided an email address.
7. Updates to our website and our email distribution lists are dependent on receipt of resident data from a Board member to a member of the Communications Committee. Residents may remove their contact information from the directory, website, or email distribution lists at any time by contacting a member of the committee. Residents may also request that their contact information be non-published.
8. Updates are provided to CERT, Social Committees, and other working committees as needed.

### Board Signatures:

Lee Sullivan: President

Lee Sullivan

Date:

1/16/23

Brook Ladd: Vice President

Brook Ladd

1/16/23

Barbara Fabian: Treasurer

Barbara Fabian

1/18/23

Nancy Rogers: Secretary

Nancy Rogers

1-16-23

Dan Hottle: Director at Large

Dan Hottle

1-16-2023



# **GREENSPACE MANAGEMENT COMMITTEE CHARTER**

## **March 2025**

### **AUTHORITY and REPORTING**

The Committee draws its authority from the Baytree Bylaws and Covenants, Conditions, and Restrictions of Baytree Villa Homeowners' Association that provide for appointment of committees by the Board of Directors. Meeting participation is open to all residents.

#### **Appointment**

This is a standing committee. The Greenspace Management Committee (also known as the Management Committee) will work with a Board Liaison to coordinate Greenspace Maintenance and Improvements on the Baytree Greenspace. The Committee will also help enforce the Greenspace Guidelines as updated in March 2025.

The Greenspace Maintenance Group (Maintenance Group) will coordinate volunteer maintenance work on our Greenspace. This group will also coordinate with the Baytree Greenspace Golf Group (Golf Group). The group will be guided by the 2025 Updated Greenspace Maintenance Plan.

The Greenspace Management Chairperson will review any resident or Board suggestions for improvements to our Greenspace. All requests to the Greenspace Management Chairperson will be provided using the Greenspace Improvements Application Form.

### **BACKGROUND**

A Greenspace Committee was appointed by the Board to oversee development and maintenance of our Baytree Greenspace common area at the time that the property was purchased by our community. The Greenspace common area consists of approximately fifty-seven (57) acres that surrounds much of our Baytree community. This land was purchased by the Baytree Community on February 26, 2021, for the use of all Baytree residents.

In February 2025, a group of Greenspace Committee members worked to transition some of the responsibilities of the Greenspace Committee back to the HOA. As a result, the Greenspace Management Committee Chairperson will now oversee both the Greenspace Maintenance Group and any Greenspace Improvements submitted by residents.

### **MISSION**

The Greenspace Management Board Liaison will interface with the Committee Chairperson and the Maintenance Group to provide the best use and upkeep of this valuable property.

The Maintenance Group will monitor the Baytree Greenspace area to help properly maintain the property in accordance with the 2025 Updated Greenspace Maintenance Plan dated March 26, 2025. The Management Board Liaison will notify the Board of any maintenance requirements which are beyond the scope of this volunteer group. The HOA Board's responsibility is to protect the property from possible detrimental impact of damage from weather, contractor damage, or improper use of the property. As such, the Board will use input from the Maintenance Group to help evaluate maintenance needs.

The Greenspace Management Committee Chairperson will review applications for residents' use and/or development of the property, and it will make recommendations to the Board, via the Management Board Liaison, which the Board may approve or deny. Recommendations to the Board must include estimated cost impacts.

### SUGGESTED ACTIVITIES

1. Tasks of the Greenspace Management Committee include oversight of any Greenspace maintenance, use, improvements, and ponds. Use of the Greenspace area should bring benefit to the residents through its recreational use, its general maintenance, any impact on the environment, and its enhancement of property values.
2. The Management Committee, with input from the Maintenance Group and the Committee Chairperson, shall develop an annual financial report to address operating expenses and funding sources.
3. The Management Committee shall oversee the use and basic maintenance of the Board-approved property improvements, recreational facilities, and environmental impacts on the property and the community.
4. The Management Committee shall meet periodically to review projects, applications, maintenance, and environment of the Baytree Greenspace. The Maintenance Group should have input at all Management Committee meetings.
5. The Management Committee shall record its actions and prepare any recommendations that are to be presented to the Board for the Board's approval or action. Written minutes and/or committee actions will be provided to the Board.
6. The Greenspace Management Chairperson will receive and evaluate applications, obtain estimated costs, funding sources and impacts, and make recommendations through the Management Board Liaison to the Board.
7. The Greenspace Maintenance Group will coordinate volunteer maintenance work on our Greenspace and provide the Management Committee Chairperson with

work items or financial requests that are beyond the scope of the group. This group will also coordinate with the Baytree Greenspace Golf Group.

## PROCEDURES

- Financial/Project expenditures, whether from donations or an HOA designated budget, must receive approval from the Board of Directors.
- A report of expenditures must be presented at monthly Board meetings.
- A report of planned and completed work and capital improvement applications will be presented in writing as needed at monthly Baytree HOA Board Meetings by the Management Board Liaison.
- The Management Board Liaison will work with the HOA Board Treasurer to provide input to the Baytree annual budget.
- Disputes regarding Greenspace use or improvements which cannot be agreed upon by the Management Committee will be reviewed and acted upon by the Board. Approvals or denials may be appealed to the Board.

Board Signatures:

DATE:

Brook Ladd:  
President

Brook Ladd

3/26/25

Marva Stephenson:  
Vice President

Marva Stephenson

3/26/25

Bob Podell:  
Treasurer

Robert M. Podell

3/26/25

Dwight Williams:  
Secretary

Dwight Williams

3/26/25

Catherine Benoit:  
Director at Large

Catherine Benoit

3/26/25

Attachments: Greenspace Guidelines  
Greenspace Maintenance Plan  
Greenspace Improvements Application  
Flow Chart of Responsibilities

## **GREENSPACE GUIDELINES**

### **Updated March 2025**

1. Entry and Exit areas for Greenspace are:

To the West Greenspace –

- Cul de sac at the West end of Baywater Drive
- Between 405-411 Juniper Way

To the East Greenspace –

- Beside 596 Juniper Way
- Between 612-616 Juniper Way
- Beside 700 Juniper Way
- There is also pedestrian only access to the East Greenspace between 414-424 Baytree Boulevard.

2. Only Baytree Resident's Golf Carts are allowed on Greenspace and shall be visibly marked with a flag or some other approved method as to indicate the golf cart is resident owned.
3. No walkers or bicycles allowed on Greenspace except for Baytree residents and their guests.
4. All dog walkers MUST clean up after your pets while walking in the Greenspace, just like any other common area at Baytree.
5. Do not trespass on residents' properties.
6. No planting on Greenspace behind homes without prior approval from Greenspace Management Committee and no artificial flowers.
7. No golfers allowed except residents and their guests.
8. Golfers are responsible for any damage done to Baytree or residents' properties.
9. Golfers, please be careful of new plantings and if you do land in them, take a drop.
10. Use cart paths as much as possible.
11. Please, ALL residents including golfers, walkers, riders, bikers, workers etc. be considerate of each other.
12. Above all, enjoy what we have and treat it like your own....because it is.

**\*\*NOTE:** These Updated Greenspace Guidelines were approved by the Baytree HOA Board of Directors on March 26 2025.

# 2025 Updated GREENSPACE MAINTENANCE PLAN

## All Greenspace

Activity	Responsibility
<u>Mowing</u>	
<ul style="list-style-type: none"><li>Mow open areas</li></ul>	HOA
1) Currently the plan is: 1x per month in winter, 2x per month in summer (contracted). Updates to mowing will be made as necessary.	
<u>Ponds</u>	
<ul style="list-style-type: none"><li>Maintain Ponds</li></ul>	
1) Currently the plan is: Weed trim around pond 2x per year (contracted) Updates to trimming will be made as necessary.	HOA
2) Treat ponds for algae growth (contracted)	HOA
3) Spot spray or trim on fairway side of retaining walls.	Volunteers
<u>Trees / cart path</u>	
1) Remove overhanging growth up to 8ft-10ft where needed for mower and cart clearance.	BOTH
2) Large tree trimming and tree removal, including Cedar Trees along cart path at Hole #8.	HOA
3) Evaluate overhanging branches for safety.	Both
4) Spot spray for weeds around trees, edge of cart path as needed.	Volunteers
5) Spot spray or trim around retaining walls.	Volunteers
<u>Greens</u>	
1) Spray for weeds as needed.	Volunteers
<u>Debris Removal</u>	
1) Remove light debris from open Greenspace	Volunteers
2) Remove large debris resulting from maintenance activities or natural causes.	Both
3) Haul debris to designated location (behind tee box at hole #11)	Both
4) Haul load of debris away from property 1 time per year (or as necessary) (Currently contracted)	HOA
<u>Wildlife</u>	
<ul style="list-style-type: none"><li>Minimize disturbance to eagles, gopher tortoises, and other wildlife.</li></ul>	Both
<ul style="list-style-type: none"><li>Identify areas, such as nests, to avoid.</li></ul>	Both

## Specific Routine Maintenance Instructions

### The following items are for volunteers unless otherwise noted:

**Hole #3** No special instructions

## 2025 Updated GREENSPACE MAINTENANCE PLAN

### Hole # 4

Pond – Do not trim vegetation (palmettos, cedars, etc.) growing on south side of the pond.

### Hole # 5

#### Tee Box

- Manually cut/trim grass in step down area that cannot be accessed by large mowers.

#### Cart Path

- Area where cart path borders Imperial Terrace: Trim or mow out to the property line and along both sides of the cart path.
- Remaining North side of cart path: Trim only out to 5 ft. Allow vegetation regrowth in all areas >5' from cart path.

#### Woods and Walk-through area

- No tree removal or trimming. Allow new growth along the fence line and within the woods. Minimal maintenance of the walk-through area.

**Note:** For Holes #5 and #6, the goal for the north boundary (except where the cart path border Imperial Terrace) is to allow vegetation growth to create a natural barrier, while allowing for a walk-through area through the woods

### Hole # 6

#### Woods and Walk-through area

- No tree removal or trimming. Allow new growth along the fence line and within the woods. Minimal maintenance of the walk-through area.
- Across cart path from tee box: mow to base of mound between the palm tree and oak tree. Allow regrowth of vegetation on the mound.

#### Fence line / tree line north side of fairway

- Maintain the existing tree line. Allow vegetation to grow along the fence line to restrict visibility and access.

### Hole # 7

#### Fence line / tree line west side of fairway

- Maintain existing tree line on west side of cart path.

#### Palmetto growth between cart path and green

- Trim only as required to maintain cart path access.

#### Pond access (required for City of Tavares)

- Keep the area clear around the fence at the access point to the pond west of the cart path.

### Hole # 8

#### Cart path from Juniper Way to #8 Tee box

- Trim or remove cedar trees enough for cart path clearance –responsibility of BOTH
- Allow ferns to grow close to cart path edge.

#### Cart path behind green (east side bordering wetland)

- Trim out to 5ft from cart path

## 2025 Updated GREENSPACE MAINTENANCE PLAN

### Hole #9

#### Cart path

- Trim out to 5ft from cart path

#### Maintenance Shed

- Keep clear approx. 3ft around shed perimeter.
- Remove close overhanging vines and limbs.
- Return tools in the maintenance shed.

### Hole #10

#### Cart path

- Trim out to 5ft from cart path
- Allow ferns to grow close to cart path edge.

### Hole # 11

#### Tee Box

- The open area in the woods behind the tee box will be used to pile brush and debris. (Note: Currently contracted to have one trailer load from the debris pile removed 1x per year, which is HOA responsibility)

#### Cart path

- Trim out to 5ft from cart path

#### Eagles' Nest

- The eagles' nest is in a tree about 20 yards into the woods just before the cart path turns toward the 12<sup>th</sup> tee.

### Hole # 12

#### Eagles' Nest

- The eagles' nest is in a tree about 35 yards north into the woods from a point just behind the bench across from the Hole #12 tee. Eagles tend to be less sensitive to activity if the view from the nest is somewhat obstructed by trees.

#### Cart path

- Trim out to 5ft from cart path, to a point 40 yards south of the bench across from the tee box. Avoid cutting any lilies or other flowers growing near the cart path.
- From 40 yard to 80 yards south of the bench, trim out to 8 yards from the cart path. This is the beginning of the garden area.
- From 80 to approximately 95 yards south of the bench (the beginning of the retaining wall), trim out to 10 yards from the cart path to just behind the avocado trees.
- From the beginning of the retaining wall to the end of the cart path, trim out to 5ft from the cart path.

**Note:** *The goal for the east border of Hole #12 is to preserve the lily and avocado tree garden area while minimizing potential disturbance of the Eagles nest.*

**NOTE 1:** If volunteers identify need for bush hogging, or other need beyond their scope, they will refer it to the committee chairperson.

**NOTE 2:** In this document, HOA refers to Board

# BAYTREE VILLAS HOMEOWNERS ASSOCIATION, INC.

## GREENSPACE IMPROVEMENTS APPLICATION

Please complete this application and submit to the Greenspace Management Committee Chairperson. Any structures erected in the Baytree Greenspace must also be approved by the Baytree ARC Committee. Proposals must meet Greenspace Guidelines and any requirements of the City of Tavares.

\_\_\_\_\_  
Date of Application

\_\_\_\_\_  
Applicant's Name

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Applicant's Address

On a separate sheet of paper, please provide a description of your request for the Baytree Greenspace. Applications should include site plans, diagrams, photographs, and any information which will adequately describe the finished project.

**Failure to provide complete information may delay the review process**

**NOTE:** It is the applicant's responsibility to ensure that all requests conform to our Baytree Greenspace Guidelines.

APPLICANT SIGNATURE \_\_\_\_\_

### ATTACHMENTS SUBMITTED BY APPLICANT

- \_\_\_\_ Written description of project
- \_\_\_\_ Greenspace location of proposed use/project/work
- \_\_\_\_ Potential impact on residents' property near proposed use area
- \_\_\_\_ Specifications (e.g., copies of plans indicating dimensions, material, colors, etc.)
- \_\_\_\_ Approximate costs and funding source to implement project
- \_\_\_\_ Approximate upkeep requirements, including volunteer & paid hours

-----  
**THIS SECTION TO BE COMPLETED BY GREENSPACE MANAGEMENT COMMITTEE**

Request Rec'd \_\_\_\_/\_\_\_\_/\_\_\_\_ BOARD Approved \_\_\_\_/\_\_\_\_/\_\_\_\_ \* BOARD Denied \_\_\_\_/\_\_\_\_/\_\_\_\_

\*Approval is only for the proposal based on the plans submitted with the application. Any changes must be re-submitted for approval.

NOTES/COMMENTS: \_\_\_\_\_

\_\_\_\_\_  
Greenspace Application Reviewed by:

\_\_\_\_\_  
Recommendation:

By: \_\_\_\_\_

By: \_\_\_\_\_

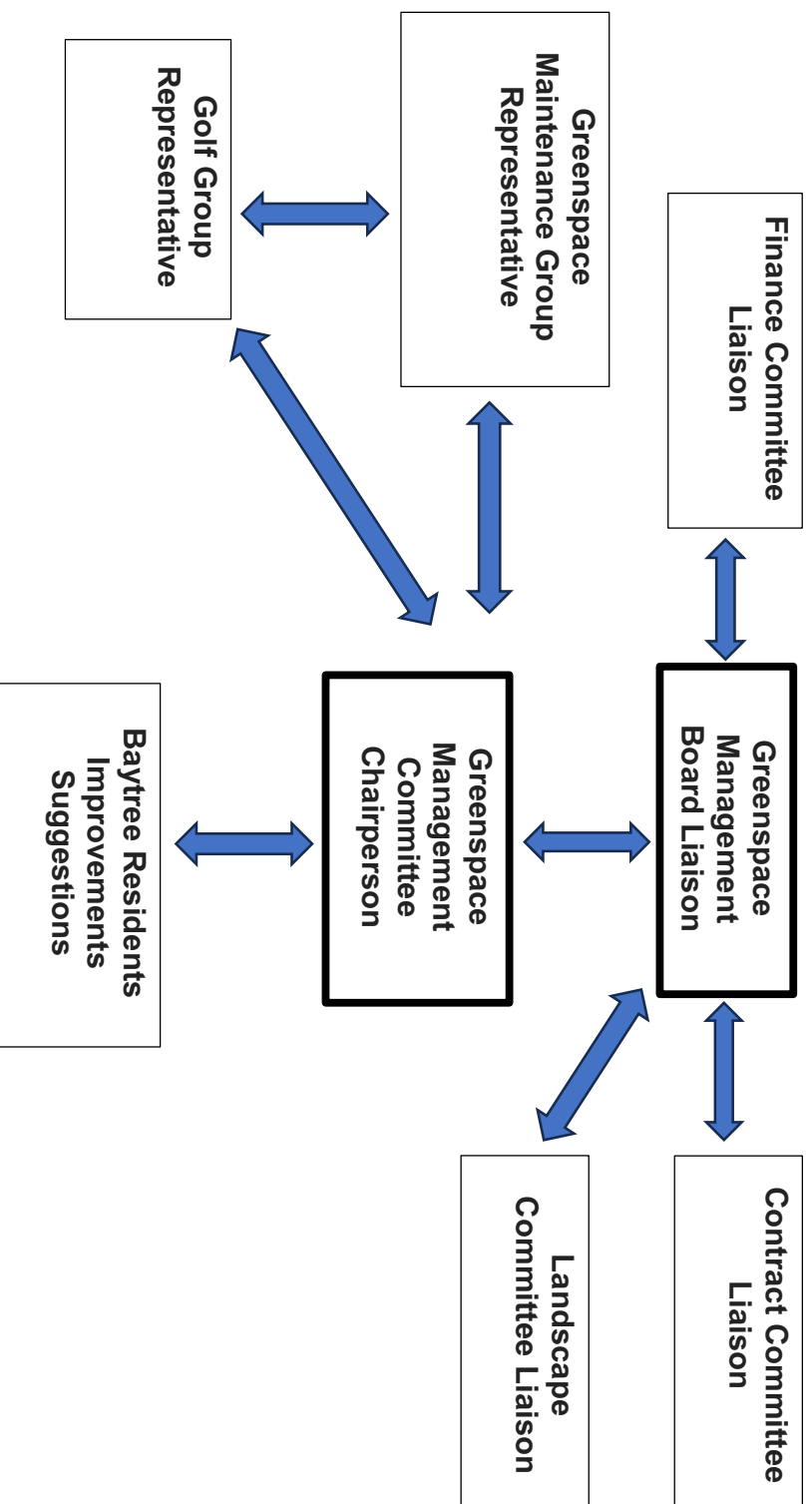
By: \_\_\_\_\_

By: \_\_\_\_\_

By: \_\_\_\_\_



# GREENSPACE MANAGEMENT COMMITTEE Responsibilities and Work Flow



# **LANDSCAPE COMMITTEE CHARTER**

## **March 23, 2025**

### **AUTHORITY AND REPORTING**

The Committee draws its authority from the Baytree Bylaws and Covenants, Conditions, and Restrictions of Baytree Villa Homeowners' Association that provide for appointment of committees by the Board of Directors. A member of the Board will be appointed as liaison to the Committee. This is a standing committee.

### **BACKGROUND**

Regardless of the contractors or systems that we use to maintain our neighborhood to high standards, we members will always be responsible for the result. The Landscape Committee assists by monitoring exterior landscaping maintenance as well as the performance of our association's maintenance systems. Feedback from this committee helps the Board track performance of our maintenance program, allowing us to make adjustments as necessary and to fund our Landscape Reserves properly.

### **FUNCTION**

The Landscape Committee monitors exterior landscaping maintenance and the performance of our association's own maintenance systems (our landscaping contractors and maintenance people) and their facility in maintaining our high standards.

**ACTIVITIES** (These activities may be performed by committee members or by selected and approved contractors)

- Respond to resident landscape complaints or concerns as necessary.
- Identify source and location of any landscape problems and determine the urgency of the situation.
- Contact proper landscape contractor or other specialist to identify cost to solve the problem and get bids if necessary.
- Track the work and resolution of each problem.
- If several areas in the community will be affected, provide information to all residents.
- Develop an annual landscape maintenance plan and provide forecasted expenditures to the finance committee for budgeting purposes.
- Meet regularly with our landscape contractor and any interested residents to plan current landscape work. Keep community informed.
- Items included in the Landscape Committee purview include lawns, ponds, sprinkler systems, exterior lighting, trees and shrubs, entrance landscaping, clubhouse landscaping, and other physical assets.
- Identify any potential future work, especially potential large expenditures that would impact not only the current budget but also our landscape reserves.

- Provide a monthly activity report to the Board and get approval for any expenditures at the monthly HOA Board meetings. Expenditures may be approved prior to the Board meeting in emergency situations.

## PROCEDURES

- Hold monthly meetings which are open to all residents, publish notices of the meetings, and record the proceedings.
- Receive, record, and evaluate requests from homeowners in a timely manner.
- Notify treasurer/Board of any budget requirements of the committee.
- Prepare a monthly report for presentation at Board meetings and provide copies of the report as requested by residents.
- Work with Contract Committee Liaison on contracts needed to fulfill work requirements.

Board Signatures:

DATE

Brook Ladd: President Brook Ladd 3/26/25

Marva Stephenson: Vice President Marva Stephenson 3/26/25

Bob Podell: Treasurer Robert M Podell 3/26/25

Dwight Williams: Secretary Dwight Williams 3/26/25

Catherine Benoit: Director at Large Catherine Benoit 3/26/25

# **BAYTREE SOCIAL COMMITTEE CHARTER**

## **June 20, 2024**

### **AUTHORITY and REPORTING**

This committee draws its authority from the Bylaws and Covenants, Conditions & Restrictions of Baytree Villa Homeowners Association that provide for appointment of subcommittees by the Board of Directors. This is a standing committee. A Board liaison is appointed for this committee.

### **BACKGROUND**

Homeowners tend to feel more responsible to neighbors they have met and know personally. This may mean fewer conflicts and more cooperation neighbor-to-neighbor and neighbor-to-association. Knowing each other also helps us to be aware of good candidates to tap for future Boards, committees, and special projects.

### **MISSION**

The two primary functions of this important committee are:

- To bring Baytree residents together socially, enabling them to develop relationships with their neighbors that enhance the harmony and pleasure of living in Baytree. To help residents understand the importance of their involvement and contributions to the community.
- To help increase homeowner awareness of the amenities of the community, encourage resident participation in social events and functions, and further conduct actions and activities that represent the HOA as a neighborly and inclusive community.

### **SUGGESTED ACTIVITIES**

- Solicit new Baytree homeowners for their involvement in community events, enhancing neighborly cooperation and quality of life.
- Assign all residents to a monthly social block and maintain and update monthly block list to keep current with new and existing residents.
- Communicate social committee procedures (What You Need to Know About Hosting an Event) and programs for the benefit of residents.
- Consider and implement new community events that are fun and interesting for all residents.
- Arrange for a social as a part of our HOA Annual Meeting in February. This may include coffee and refreshments provided by monthly social groups.
- Contact new residents in order to involve new residents in different groups and committees.
- Work with Sunshine Committee to assure that both committee members and new residents have all available community information
- Maintain an inventory of all items needed to support social activities (including drinks, paper supplies, drinks, etc.).

- Assure agreement between Social Board Liaison and Treasurer for purchases of items or awarding contracts in excess of \$200. Treasurer will contact Board members to review any costs in excess of \$200 that require additional review and/or approval.
- Social Committee Chairperson must sign the current Social Expense Planning Worksheet to assure funds collected for events should cover all expenditures. Any discrepancies must be noted.
- Manage calendar of events held in the Clubhouse to assure that all of the facility is being used properly, and that existing spaces can accommodate all activities.
- Reply to event scheduling date requests within 24-48 hours.

Groups / Individuals under Social Chairman:

- Monthly Social Block Chairmen
- Event Scheduling (Calendar) for Main Room and Library spaces
- Clubhouse Social Supplies (paper products, drinks, etc.)
- Drinks
- Sunshine

PROCEDURES

- Provide monthly written report to the Board on Social Activities and any issues.
- Hold meetings with Monthly Social Block Groups as needed to assure compliance with established procedures and rules and to get input on any issues.
- Provide input to Finance Committee on projected supply cost increases, etc. for budgeting.
- Assure that all social functions are self-supporting and all expenses, including cost of supplies used, are recovered from revenue from the activities.
- Report expenses (provide receipts) to the Treasurer using the Social Events Cash & Expense Accounting form. Provide information on any projected unusual expenses or shortfall of funds to the Treasurer and the Board.

Board Signatures:

		DATE
Brook Ladd: President	<u>Brook Ladd</u>	<u>6/24/24</u>
Marva Stephenson: Vice President	<u>Marva Stephenson</u>	<u>6-24-24</u>
Bob Podell: Treasurer	<u>Robert Podell</u>	<u>6.24.24</u>
Dwight Williams: Secretary	<u>Dwight Williams</u>	<u>6/24/24</u>
Catherine Benoit: Director at Large:	<u>Catherine Benoit</u>	<u>6/24/24</u>

## What you need to know about Hosting a Dinner at the Baytree Clubhouse

### Social Block Captains:

1. A month or two in advance, contact the residents on your month's list and set up a meeting to discuss activities for your month. Notify Cheryl Dudley **(352-343-3924)** as soon as possible after you set your dates. Notify Becky Williams ([baytreescene@gmail.com](mailto:baytreescene@gmail.com) or 304-421-4694) of your activities so that they may be included in the Baytree Scene newsletter. Monthly Social activities generally appear on the front page of the newsletter. After the dinner/event, you can send Becky pictures to be posted on our Baytree Facebook page.
2. Dinners may be catered, prepared, or potluck. If dinner is prepared by an outside caterer, gather information as early as possible. If your group is preparing the meal, determine the cost of all supplies to be purchased. Keep your receipts for all purchases or invoices, as these must be turned in with your expense form at the end of the month.
3. You should receive a set of keys and a cash box from the previous month's social block captain. The keys provide access to the supplies closet and to the refrigerator.
4. Post a sign-up sheet on the clubhouse bulletin board one month prior to your dinner (all residents and their house guests are welcome). The sign-up sheet should include the following information: Date, Time (i.e. 5:30pm social, 6:00pm dinner), Approximate Price, and Captain's name and phone number. Remove the sign-up sheet from the bulletin board 3-4 days prior to the event.
5. Make sure that there is an extra full keg of beer and notify Gary or Catherine Benoit when a keg is empty. Earl Salminen (352-253-0170) maintains the wine and soda supplies. Paulette Micklos (484-725-2779) maintains the paper supplies in the supply closet.
6. The clubhouse is available for set-up after noon for Saturday events. For events held on weekdays, negotiation with any other groups using the clubhouse need to be made before you set up.
7. As residents enter the main room, collect their money and check off their names on the sign-up sheet. The sign-up sheet and any receipts must be included with the money and the Social Events Cash & Expense Accounting sheet that you give to the Board Treasurer or the Board Social Committee Liaison. Make sure that you have included the \$3.00 per person charge for paper goods and drinks.
8. Read the instructions for "Kitchen Use" posted on the wall by the kitchen counter. The instructions deal with appliances and cleanup (VERY IMPORTANT). Be



sure that you have done a good job in cleaning up after your event and leave the facility in good condition. There are cleaning supplies under the sink and the vacuum cleaner is located in the housekeeping closet in the foyer which is located on the right just before you enter the pool gate. Your clubhouse key will open this closet.

9. When working with food, use the gloves provided in the cabinet.
10. There is absolutely NO Frying in the clubhouse by order of the Tavares Fire Marshall.
11. Turn the hot water heater on using the switch to the left of the sink. You will need the hot water on for the dishwasher. If you use silverware, you must put the silverware in the dishwasher and run it before you leave. Plan to return the next morning to empty the dishwasher and return contents to their proper storage. Turn the hot water switch off before you leave the clubhouse following your event.
12. If you choose to use the outside grills, be sure to let the gas burn for 5 minutes after food is removed and use the wire brush to clean the grill grates.
13. Empty the trash inside the clubhouse into the trash cans on the rear deck. You may need to do this several times during the event, as well as at the end of the event, if you have a large crowd. Please do not start cleaning up (clearing tables, vacuuming, etc.) before the event is over.
14. Before you leave, turn off and lock the beer tap and rinse the tray on top. Lock the beverage refrigerator (place the wine boxes spigot up and check for spillage). Lock both the paper and sound system closets. Set both air conditioners at 80 degrees. Make sure that extra chairs are stacked and placed against the wall. All used tablecloths and dishtowels must be taken home, laundered, and returned to the clubhouse.
15. Following your last event for the month, turn in any proceeds along with your Social Event Cash & Expense Accounting Form to the Board Treasurer or the Social Committee Board Liaison, and pass the set of keys and cash box to the next month's social block captain.

**BAYTREE HOMEOWNERS' ASSOCIATION**  
**Private Function Contract for Reservations**

I, \_\_\_\_\_ (resident's name), as a member of Baytree Villas Homeowners' Association, request the use of the Main Room on \_\_\_\_\_ (date) from \_\_\_\_\_ to \_\_\_\_\_ (time).

The purpose of this reservation is \_\_\_\_\_.

There will be approximately \_\_\_\_\_ guests present.

**I agree to abide by the Baytree Clubhouse Facility rules set forth below:**

- 1) A private function is an event that is limited to resident and invited guests only.
- 2) The resident in whose name the reservation is made **must** be present during the function and is **liable** for any damages or breakage, for ensuring that all clean-up tasks are completed, and for any misuse of the facility, including any violation of this contract.
- 3) The reservation will be confirmed after the above resident has signed this contract and has given the association a deposit check for \$100, made out to Baytree Villas Homeowners' Association.
- 4) The deposit will be refunded after the event is complete, the facility has been checked, and all conditions of this contract have been met.
- 5) If any of the equipment, furnishings, or facilities are damaged, or the facility has not been cleaned, the deposit will be used to offset costs for repairs and/or cleaning the facility. If the amount of the damage and/or cleaning exceeds the amount of the deposit, the resident who reserved the clubhouse will be required to pay the additional expense.
- 6) The use of the clubhouse must be for social activities only. No business meetings, club meetings, sales meetings, or meetings intended for money-making purposes will be allowed.
- 7) Due to the numerous functions which are held in the clubhouse, set-up and cleanup for any function should be included in the time slot requested for the day of the event.
- 8) In the interest of economy, please use only the level of utilities required for comfort. Air-conditioning and fans should not be turned on more than 1 hour prior to the scheduled function. All lights and fans in both the Main Room and Restrooms must be turned off when you leave the clubhouse. All air-conditioners must be turned to 80 degrees.
- 9) No temporary signs or decorations of any kind may be affixed to the walls.



- 10) If the overhead speaker system is to be used, please contact Mike Stephenson for directions. The equipment on the stage does not belong to the community, so it may NOT be used.
- 11) You must furnish your own paper plates, napkins, placemats, table coverings, condiments, paper towels, miscellaneous supplies, and cleaning supplies. Only Association sponsored functions are entitled to use in-house supplies.
- 12) The Clubhouse beer, wine, and other drinks may NOT be used at a private function.
- 13) Per order or the Tavares fire department, absolutely NO frying may be done in the clubhouse.
- 14) If you plan to use the BBQ grill on the outside deck, there will be an additional \$25 usage charge which is non-refundable.
- 15) Restrooms are to be left clean.
- 16) The resident in whose name the reservation is made, and all guests, agree to indemnify and hold harmless the Baytree Villas Homeowners' Association, Specialty Management, and their affiliates, employees, and contractors for any injuries, damages, or other inconveniences caused in the course of using the Baytree Clubhouse for their event. Baytree Villas Homeowners' Association assumes no liability or responsibility related to the consumption of alcoholic beverages on its property. Any injuries or damages that arise from the consumption of alcoholic beverages are the responsibility of the resident reserving the clubhouse.

Signatures:

I have read and agree to the rules and conditions of this contract.

By: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Complete this form, sign, attach deposit check for **\$200** made payable to Baytree Villas HOA, and return the signed copy and attached check to:

Cheryl Dudley – Baytree Private Event Reservations  
331 Juniper Way  
Tavares, FL 32778                      Phone: 352-343-3924

NOTE: If you plan to use the grill, attach a separate check for \$25 which is **not** refundable.

## Social Event Expense Planning Worksheet

*This sheet is to be used for estimating the monetary costs for any social event taking place for the Baytree community. The group holding the activity is responsible for filling out the form. The group must keep receipts for all expenditures (please use the Baytree credit card for purchases whenever possible). The event sign-up sheet must be provided following the event to show all cash collected. This form is designed to provide guidance in estimating the amount to be charged for each individual who will be attending the event. All events should be self-funded - the amount charged and collected should cover all expenses for the event.*

Event: \_\_\_\_\_ Date held: \_\_\_\_\_

Resident Coordinator: \_\_\_\_\_ Contact number: \_\_\_\_\_

1) Estimated # people to attend the event: \_\_\_\_\_  
Use sign-up sheet, previous years' attendance, etc. to estimate the # attendees.

2) Estimate the total expenses for the event:  
• Indicate breakdown of expenses for the following:

\_\_\_\_\_ Estimated cost of Food to be purchased

\_\_\_\_\_ Estimated cost of Decorations to be purchased

\_\_\_\_\_ Estimated Music/Entertainment costs

\_\_\_\_\_ Estimated Other Costs (provide detail)

\_\_\_\_\_ Standard fee for cost of supplies provided by Social Committee  
(\$3.00 X # people) – You *must* include this figure!

3) Estimated Total Expenses: \_\$\_\_\_\_\_ (sum of above items under #2)

**Estimated total expenses #3 divided by estimated # attendees #1: \$\_\_\_\_\_**

**This is the amount that should be charged per person for the event.**

(The amount may be rounded to a full dollar amount.)

Signature of Event Coordinator: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Social Committee Chairperson: \_\_\_\_\_ Date: \_\_\_\_\_

NOTE: *Please review this form with the Social Committee Chairperson prior to the event.*

## Social Events Cash & Expense Accounting

This sheet is to be used for reporting the monetary activities for any social event taking place for the Baytree community. The group holding the activity is responsible for filling out the form. The group must provide receipts for all expenditures. The event sign-up sheet must be provided to show all cash collected. This form and any cash or check must be submitted to the Baytree HOA Treasurer within 30 days of the event.

Event: \_\_\_\_\_ Date held: \_\_\_\_\_

Resident Coordinator: \_\_\_\_\_ Contact number: \_\_\_\_\_

1. Cash received: \$ \_\_\_\_\_ (# people x price per meal plus surplus food sales)
2. # Residents attending: \_\_\_\_\_ (attach sign-up sheets)
3. Provide breakdown of Expenses as described below: (attach receipts)
  - Indicate breakdown of expenses for the following: (Please use Baytree Credit Card for expenses if possible, and maintain receipts)

\_\_\_\_\_ Food purchased – Indicate Credit or Cash

\_\_\_\_\_ Decorations purchased – Indicate Credit or Cash

\_\_\_\_\_ Music/Entertainment costs – Indicate Credit or Cash

\_\_\_\_\_ Other Expenses (*provide detail*) – Indicate Credit or Cash

\_\_\_\_\_ Standard expense paid to HOA for cost of supplies provided from Social Committee Account (\$3.00 X # people)

4. Total Expenses: \$ \_\_\_\_\_ (sum of all items listed in #3 above - include both cash and credit card expenses)

Cash less Expenses: \$ \_\_\_\_\_ (#1 above minus #4)

If there is surplus cash, what is the date which cash or check is given to Treasurer or Social Committee Liaison: \_\_\_\_\_

Signature of Treasurer or Social Committee Liaison: \_\_\_\_\_

Signature of Event Coordinator: \_\_\_\_\_ Date: \_\_\_\_\_

# **VILLA COMMITTEE CHARTER**

## **January 16, 2023**

### **AUTHORITY and REPORTING**

The Committee draws its authority from the Baytree Bylaws and Covenants, Conditions, and Restrictions of Baytree Villa Homeowners' Association that provide for appointment of committees by the Board of Directors. The decisions of this committee are subject to the approval of the Board of Directors.

#### **Appointment**

This is a standing committee.

### **BACKGROUND**

The Villa Committee was initially appointed to oversee the Villa Escrow funds. The functions of the Villa Committee have evolved and expanded since the Villa Committee was originally chartered. Residents who live in attached Villas often have different needs from those who live in single family homes. Most repairs and replacements must conform to the rest of the Villas. Making repairs as a group can guarantee uniformity and lower prices. Issues such as insurance can affect the rest of the owners in a Villa complex.

### **MISSION**

Oversee and make recommendations for Villa repairs and replacements, which must conform to guidelines. Provide guidance to Villa owners and Board of Directors on any changes in guidelines that may be needed. With a Board representative, oversee any issues that may affect all owners in a Villa group when there is conflict among the owners.

### **SUGGESTED ACTIVITIES**

- There are 5 main groupings of villas in Baytree. Ideal make-up of the committee is a representation of these groupings. The committee will also have a committee chairperson and other officers as deemed necessary.
- Hold monthly meetings to address old and new business. Meetings are open to all Baytree villa owners.
- Post meeting dates.
- Assure that all work performed on the exterior of any villa receives approval of the villa owners and the ARC. Appeals may be made to the Baytree Board of Directors if work has been denied.
- Assist the Board in notifying villa owners of changes that may affect villa owners. (i.e., changes in ARC rules, payments, maintenance, etc.)
- Act as sounding board for villa residents to assure that rules in the Covenants, By-laws, or Residents' Handbook are understood and followed.

## PROCEDURES

- Provide written monthly report to Board, which will be shared at HOA Board meetings.
- Appraise Board members of villa residents' issues.
- Act as interface between Board and villa residents to resolve problems.
- Make recommendations to the Board, as needed, on villa issues.
- Interface with Finance Committee on villa assessments.

### Board Signatures:

Lee Sullivan: President

Lee W. Sullivan

DATE:

1/16/23

Brook Ladd: Vice President

Brook Ladd

1/16/23

Barbara Fabian: Treasurer

Barbara Fabian

1/18/23

Nancy Rogers: Secretary

Nancy Rogers

1/16/23

Dan Hottle: Director at Large

Dan Hottle

1-16-2023