



2017 - 2023 DLA Accomplishments:

Conservation of Deer Lake, including our heritage of family-enjoyment in clear water

1. Aquatic Invasives Prevention

- a. **Increased and Optimized Aquatic Invasives (AIS) Inspection Hours at the Deer Lake Public Access:** DLA raised funds through donations and grants, then partnered with the Itasca AIS Inspection Program to increase inspection-hours at the Deer Lake public access from a few hours some weekends, to 7am-8pm seven-days per-week. Purchased and installed a directional Traffic Counter. Analyzed Traffic Counter data, then worked with the AIS Program to optimize inspection hours to launch traffic. Increased the quality of inspections through new hiring standards and training.
- b. **Deer Lake Station:** DLA raised \$50,000 in donation and grant funding, gained regulatory approval, negotiated a land Lease Agreement, then, in partnership with the Itasca County AIS Program, designed, constructed, tested, and made available Deer Lake Station at the Deer Lake public access. The Station is open and available 24/7, and enables the general public to use self-service rinse-water, bait-exchange water, and AIS-removal-tools to practice Clean, Drain, Dispose, and Dry as required by MN law. The Station includes lights for use at night. The Station also enables the Itasca AIS Program and other DNR-trained staff to use 140° hot-water and high-pressure to decontaminate boats and trailers onsite. Negotiated a Use Agreement including a \$2500 annual payment from the Itasca AIS Program to help DLA pay for annual Station operating expenses. Raised an additional \$50,000 in donations, then established a new Account inside the Deer Lake Legacy Fund dedicated to providing DLA another \$2500 in annual Station operating expense support.
- c. **AIS Communications Initiative:** In partnership with the Itasca County AIS program, helped develop and implement a Deer Lake and County-wide AIS Communication Initiative, including a six-year property-owner social-media, email, and US Mail communication campaign, community meetings and information events, including an annual AIS Summit for Resorts, Camps, and Lake Service Providers. Helped develop and implement an Itasca County Lake Association communication campaign including a library of ready-to-use communication tools written for use by lake associations. Developed and communicated AIS Safeguards, AIS flyers, and other tools for resorts, vacation rentals, and property owners and guests, including private launch owners. Developed and implemented the FiveStar Lake Service Provider Initiative, the Canaries Initiative, and developed and raised funds to implement a Deer Lake AIS Rapid Response plan. Wrote, published, distributed, and revised annually the Deer Lake Property Owner's Handbook, including information describing how property owners and guests can help reduce the amount of phosphorus flowing into Deer Lake and help prevent the introduction and limit the spread of aquatic invasives.

2. **DLA Septic Initiative:** Failing septic systems are a key contributor to the Deer Lake phosphorus load. DLA raised donation and grant funding, used publicly available information to determine the likely age of septic systems around Deer Lake, then implemented a Septic Initiative that encouraged property owners with systems installed in 1996 or earlier to undergo voluntary inspection and replacement. Approximately 50 of an estimated 75 failing septic systems were replaced through this Initiative. Rewrote DLA septic materials and made them available to other Itasca lake associations.
3. **DLA Shoreland Initiative:** Phosphorus enters Deer Lake from shoreline-erosion, and rain, storm, and melt water runoff. DLA raised funds from donations, then developed and implemented the Deer Lake Challenge, DLA's Shoreland Initiative. The Deer Lake Challenge includes both a *Self-guided* and *Shoreland Visit* option. Both are intended to encourage property owners to conserve forested shorelines and ice-ridges, to encourage property owners to add buffers where forested shoreline has been removed, and to add a low-berm where ice ridges have been breached or removed. Performed approximately 40 Shoreland Visits. The Deer Lake Challenge self-assessment has been downloaded approximately 75 times.
4. **DLA Land Purchase and Donation:** DLA raised \$503,000 via donations, a grant, and an outside payment, then DLA purchased 43 acres of unimproved land critical to Deer Lake water quality, including 435' of forested Deer Lake shoreline. Negotiated Purchase Agreement with seller. Recognized an opportunity prior to closing, then renegotiated the purchase price to save DLA more than \$40,000. Sought and received donor permission to use that \$40,000 to establish the Lakeshore Fund, a new account inside the Deer Lake Legacy Fund dedicated to help DLA purchase and hold land critical to Deer Lake water quality. The Lakeshore Fund also enables DLA to accept and hold donated land critical to Deer Lake water quality. Sought and gained authorization from Itasca County Commissioners to donate DLA's 43 acres to the MN DNR for the purpose of expanding the existing and neighboring Wabu Woods Scientific and Natural Area. DLA expects its land donation transaction to close during 2023.
5. **Deer Lake Frolic Picnic:** DLA attracted and served an average of 180 persons annually at the Deer Lake Frolic Picnic, intended primarily to build Deer Lake community, but also to serve as a fundraiser for the DLA Operating Fund. Increased annual Deer Lake Frolic Picnic revenue year-over-year from \$5,110 in 2017, to \$17,113 in 2023.
6. **DLA Membership:** There are approximately 600 persons who are current Associate Members, Regular Members, or Lifetime Members of the Deer Lake Association (counting couples as two). At least one person in each of approximately 250 of the 350 properties around the lake is a current member (71% representation). Increased the number of DLA Lifetime Members from 6 to 89. Approximately 725 persons are members of the DLA Facebook page.
7. **Deer Lake Legacy Fund:**
 - a. **Assets**

DLA increased Deer Lake Legacy Fund assets from just over \$130,000 to nearly \$700,000. Qualified and hired a professional investment firm to manage Fund assets. Developed and implemented metrics to measure Fund manager performance against the S&P 500 benchmark index. Established and funded the Deer Lake Station Account and the Lakeshore Fund.

b. Governance, Tracking, and Reporting

DLA worked with DLA's attorney and CPA to write, revise, or update Descriptive Instruments that document and establish governance and investment and spending regulations for each of the six funds and accounts now inside the Deer Lake Legacy Fund, so each are in compliance with the law and donor intent. Established Fund-Accounting and reporting procedures. Worked with DLA's CPA to develop a detailed Fund-Accounting spreadsheet to automate monthly and annual Fund-Accounting calculations and track balances, including deposits, withdrawals, fees, taxes, interest, dividends, and capital gains, for each of the six funds and accounts inside the Legacy Fund.

8. Regulatory Reporting

a. DLA Annual Financial Statements

DLA qualified and hired a CPA. Worked with DLA CPA to develop and establish the precedent and form for new annual Balance Sheet and Profit & Loss statements, then prepared and published annual DLA Financial Statements. Converted DLA from Quicken to QuickBooks accounting software.

b. DLA Annual IRS Form 990 Submission and Other Regulatory Filings

Worked with CPA to develop and establish the precedent for DLA's required Form 990, the full Federal IRS return for organizations exempt from income tax. Prepared and submitted DLA Form 990 annually. Established and implemented DLA governance policies required by the full 990. Prepared and submitted annually the DLA MN Charitable Organization Report to the MN Attorney General and the MN Nonprofit Corporation Renewal with the MN Secretary of State.