

Conservation Committee

Annual Report - 2026

Committee Members

- Kurt Lemke
Chair and Dam Maintenance
- Bob Pirtle
Sediment Basins
- Greg Richman
Community Reporting
- Rodney Stickrod
Member
- Bob Porter
Member
- Andrew Clinton
Fish Stocking
- James Grant
HLA Board Liaison

Sediment Basins – Bob Pirtle

- Maintaining the sediment basins reduces the amount of silt coming into Heritage Lake
- Every other year the basins are inspected, then scheduled to be cleaned out if needed during the winter to reduce air pollution
- Clean out may require sediment being hauled out of the association increasing our costs.
- Landscapers may be brought in to restore some areas around the sediment basins.

Aquatic Weed Control – Kurt Lemke

- The lake is sprayed 5 or 6 times per year by a licensed vendor. We always opt for aquatic herbicides with no swimming restrictions.
 - Problem areas are addressed as needed as well
- Herbicides are alternated to increase the effectiveness of weed control.
- Procellacore is not an aquatic herbicide but was successful at controlling our Milfoil for three years, a vendor treatment was completed in 2023.

Fish Stocking - Andrew Clinton

- The lake is surveyed occasionally via electroshocking
 - This was last completed in 2022
 - Shocking was planned in 2025 but the lake levels were too low
- The committee also reviews the historical stocking data for the lake to determine the stocking order, roughly \$4,000 per season.
- The stocking report is called in and delivery is usually scheduled in the spring.
- Our last stocking was completed in 2025.

Species	QTY
Walleye 5"-7"	600
Northern Pike	25
Musky	25



Heritage Lake Association Annual Meeting Dam Update

March 14, 2026

Background



- Existing spillway pipe was still in good shape, but at 50 years old it needed to be lined or replaced
 - Replacement would be very costly and require draining of the lake
 - Investigation into lining started in ~2014
- IL DNR required the Dam be updated to current standards as a condition to permit the “major modification” of lining the spillway pipe
- HLA spent ~5 years looking into other options and getting engineering opinions
- Engineering planning, design, negotiation with the IL DNR, and permitting took 4 years
- IL DNR has agreed to allow HLA 7 years to complete the agreed to updates. Fall of 2030
- First step of lining the existing spillway pipe was completed in 2025
 - New valve
 - Stop gate for emergency lake level reduction

Why Do We Care About Maintaining the Dam?



- Other than the amenity benefit of the lake, there are other financial and liability reasons
- Liability insurance rates
 - We are required to insure against our dam liability
 - Our insurance company since 2020 has grown very interested in our bi-annual inspections and our timeline for updating the dam
 - Our maintenance actions or inaction has a direct effect on our insurance rates
- Dam breach liability
 - We are liable for damages downstream in the case of a dam breach
- The State can force us to breach the dam if we don't maintain our infrastructure
 - ~\$90,000 to breach the dam
- Unplanned repairs are always more expensive than maintenance

Progress in 2025



- Engineering design work was completed for the secondary spillway pipe
- The design was reviewed and sent out for budgetary quotes, two were received from contractors
 - Total project ranged from \$1.0 to \$1.7 million
- Cost reduction options were reviewed between the contractor and engineer
 - Total savings was under \$100k
- The major unseen cost and about 1/3 of the cost is a ~42" tall wall along the dam on the lake side for wave protection when the lake level is near the top of the dam
 - This is with both spillways at full capacity with a very large rain event
 - We are currently working with the engineers and potentially the DNR to see if there are more cost-effective solutions.

Timeline



- Estimated Timeline:
 - 2026 - work through potential wave wall options and funding
 - Late 2026 - wait for permit approval, start bidding process if the timing works out
 - 2027 - Secondary spillway pipe construction
- Heritage Lake has until 2030 to complete this project under currently negotiated terms



Funding

- Fully or Partially Dedicated Lake Funding (as of Jan 2026)
 - Infrastructure Reserve Fund = \$320,985.60
 - Lake Fund = \$284,256.05
 - Total = \$605,241.65
- Total General Fund (excluding Emergency Fund)
 - Checking = \$121,614.93
 - CDs = \$591,142.34
- Potential Available Funding
 - \$900k to \$1.0 million
 - Does not include any other Heritage Lake expenses such as pool renovations & cleaning out the sediment basins
- Project likely requires a special assessment

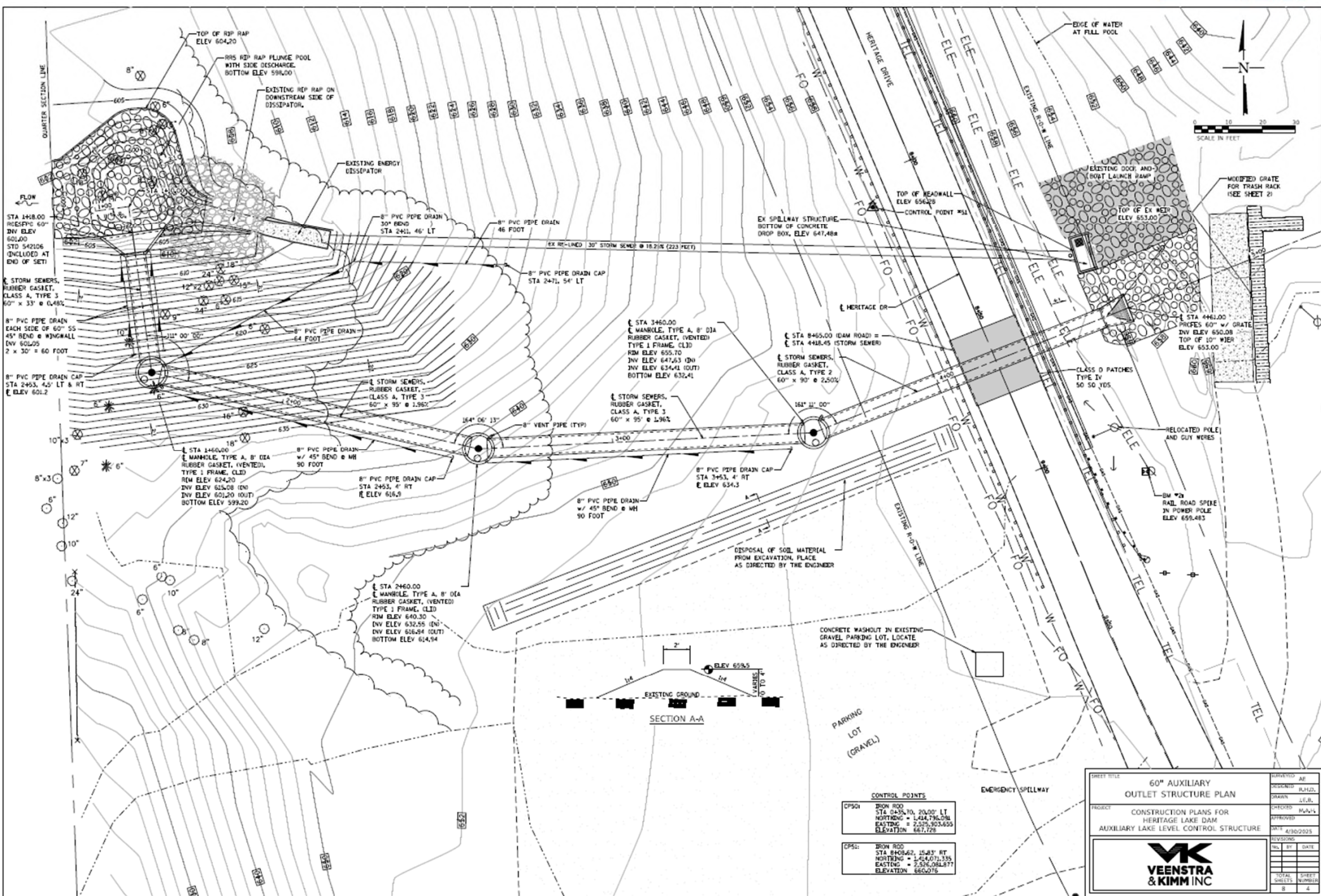
Thank You!

- Kurt Lemke
- Matt Cagle
- Cam Stalzer
- Tiffany Masters
- Jim Grant





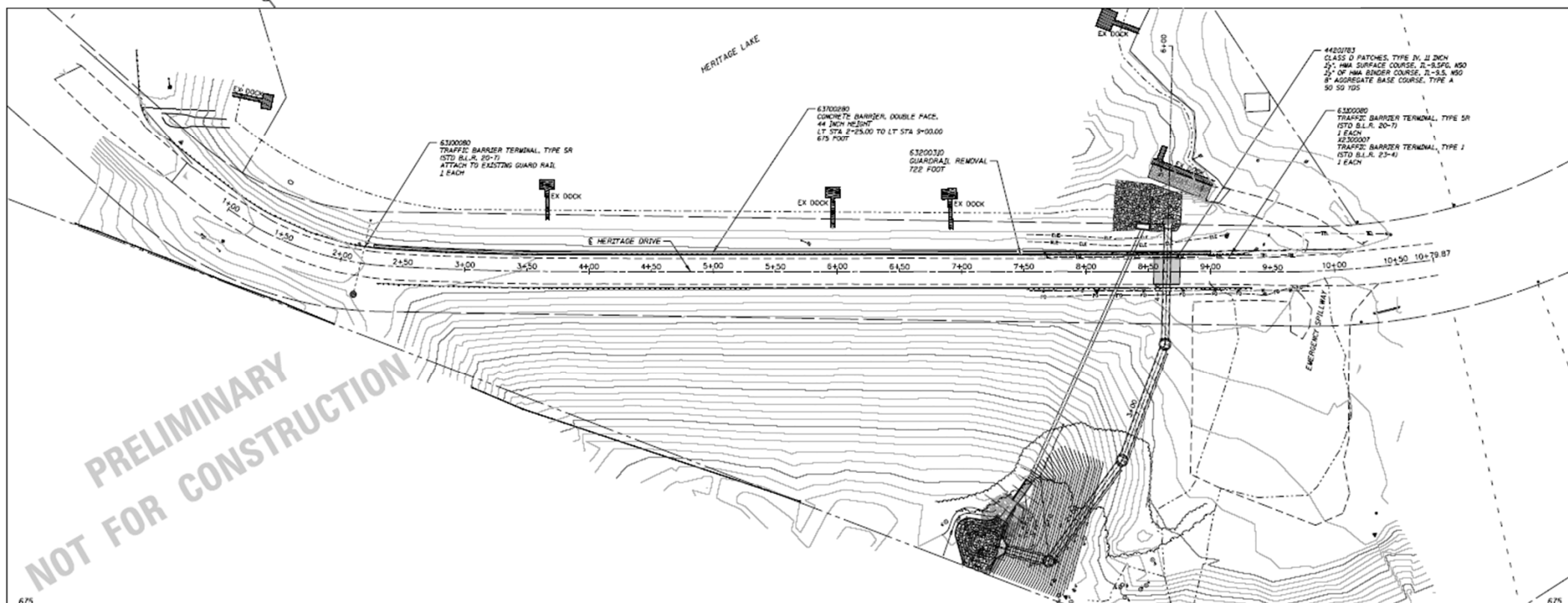
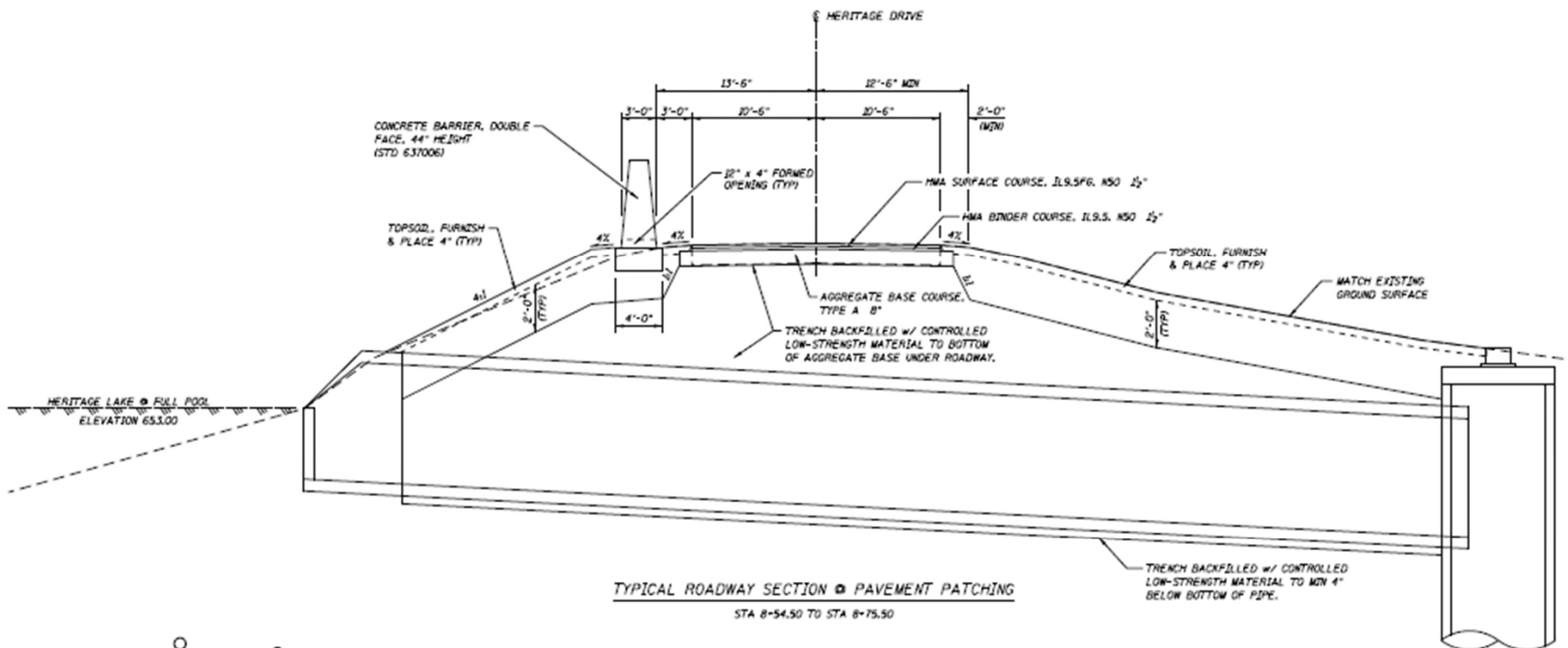
Backup



SHEET TITLE		DATE
60" AUXILIARY OUTLET STRUCTURE PLAN		08/20/2015
PROJECT		CONSTRUCTION PLANS FOR HERITAGE LAKE DAM AUXILIARY LAKE LEVEL CONTROL STRUCTURE
DESIGNED BY	APPROVED BY	DATE
DRN	LEB	08/20/2015
CHKD BY	DATE	
TEL		
TOTAL SHEETS	SHEET NUMBER	
8	4	

CONTROL POINTS	
CP50:	IRON ROD STA 845.70, 20.00' LT NORTHING = 1,444,786.58 EASTING = 2,526,303.655 ELEVATION 667.728
CP51:	IRON ROD STA 840.62, 15.83' RT NORTHING = 1,444,671.535 EASTING = 2,526,081.877 ELEVATION 666.076

JOB NO. 6093 VEENSTRA & KIMM, INC. DESIGN FIRM REGISTRATION NUMBER 18-001939





Heritage Lake Association Annual Meeting Road Update

March 14, 2026

Thank You!



- Engineers and contractors create and execute the plans
 - **None** of this would be possible without **Heritage Lake** **Volunteers** that organize the effort, and keep track of road condition and cash flow
 - These volunteers are critical to the success of the 20 year maintenance plan and beyond
 - While we are required to keep the roads maintained as a part of the SSA ordinance, **Heritage Lake is required to initiate the work request**
 - Thank you to our volunteers!
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Thank You!



Road Committee Members:

- Joe Woodrum
- Matt Cagle

SSA Commission Members:

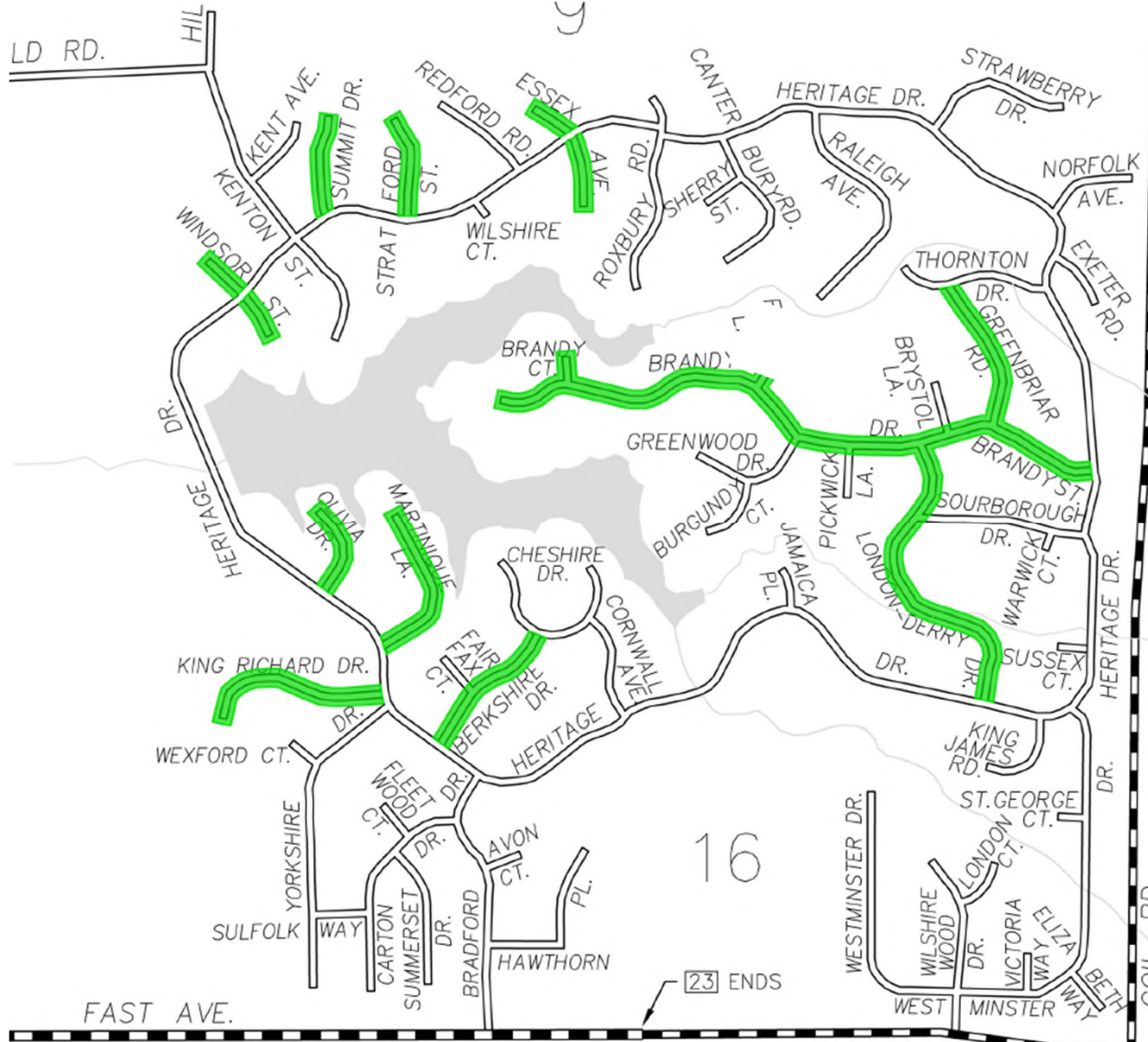
- Jim Flynn
- Bonnie Lemke

HLA Maintenance Staff:

- Shawn Cassatt
 - Ted Derr
 - Rich Sharp
-



2025 Projects

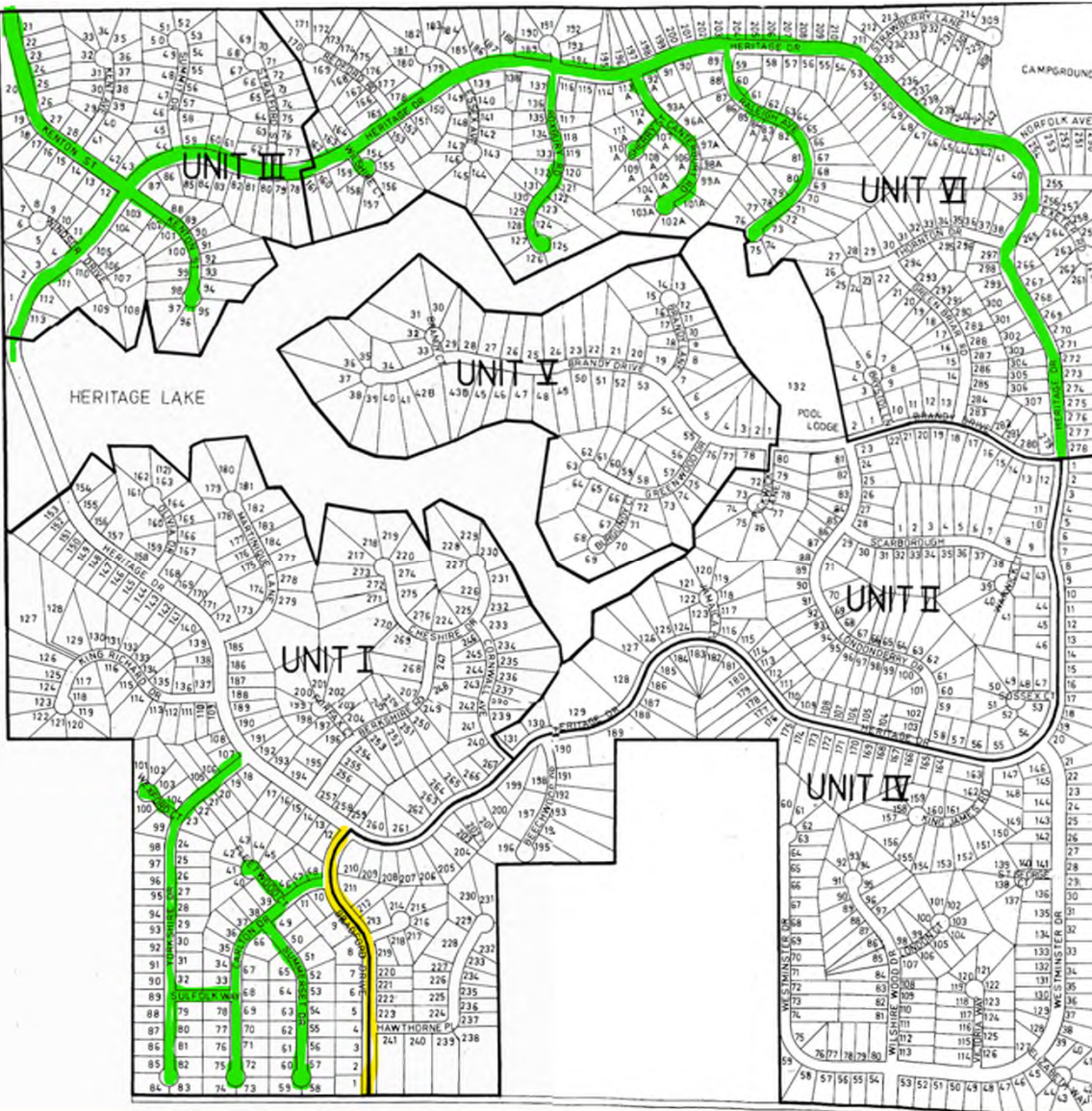


- Spray Patch
- Seal Coat
- Finalized culvert lining plans

2026 Projects



- Spray Patch
- Seal Coat
 - Bradford is planned for 2027, but may move to 2026 with parts of Heritage Dr moving to another year
- Ditch Excavation & Driveway Culvert Replacements on Raleigh
- Road Culvert Lining and Excavation





SSA Tax Levy

- HLA submitted a list of property ID numbers
 - This was approved by the SSA commission in Jan 2026
 - Members should only receive one SSA tax even if multiple lots are owned
 - **It's critical to keep the HLA office informed of any ownership changes or combination of lots, especially if the sale of a lot creates or removes a member**
 - Tax levy of \$425,000 was passed by the commission in July 2025
 - Heritage Lake has 597 (vs 603) members
 - 2025 tax levy per member = \$711.89
 - Balance will be split like other taxes - half June, half September
 - This will be on the 2025 property tax statement that is due in 2026
-



Inflation

- Maintenance plan has a 2.4% per year inflation since 2018
 - The large changes in the Seal Coat Plan Estimate are due to how the plan accounts for the additional work for Cul-De-Sacs
- Contractor estimates are sometimes over plan in recent years
- Flattening of the maintenance plan has helped cash flow
- SSA Maintenance funds are invested by the Tazewell County Treasurer in an IMET fund earning around 5% APY
 - About \$40,000 in earned, tax free interest in 2025

Road Work Year	Seal Coat Plan Estimate (\$ / Sq Yd)	Actual (\$ / Sq Yd)
2018	\$4.44	\$3.32
2019	\$3.32	N/A
2020	\$3.40	N/A
2021	\$3.60	\$3.66
2022	\$3.56	N/A
2023	\$3.65	\$3.67
2024	\$3.74	N/A
2025	\$4.99	\$5.35

Future Maintenance Plans



- Resurfacing schedule
 - Main roads: 5 year rotation
 - Secondary collector roads: 7 years
 - Other secondary roads: 9 years
 - Spray patching and crack filling will be performed as needed
 - Culverts and ditches will be lined/cleaned as needed
 - Members will be charged to clean out any ditches that are intentionally filled in
-

Winter Weight Limits






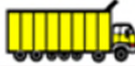






























C. Weight and Height Restrictions

1. From the period of January 1 through April 15, no vehicle, trailer, or cargo meeting the criteria below may be driven upon any subdivision road unless given proper permission by the Subdivision Board of Directors.
 - a. Vehicle, trailer, cargo, or combination exceeding a gross combined weight (GCW) limit of 8 tons (16,000 lbs.)
 - b. No vehicle greater than a Federal Highway Administration (FHWA) Class 5 single unit vehicle.
 - c. Exceptions:
 - a. School bus
 - b. Weekly trash collection (does not include dumpsters)
 - c. Emergency Septic pumping (Must notify the HLA Office)
 - d. Emergency repairs as determined and approved by the Director of Maintenance and the Road Committee Chairman
 - e. USPS, UPS, FedEx, etc. delivery vans – does not include semi-trucks
 - f. Moving vans – no size limit (Must notify the HLA Office)
 - g. Any other exceptions as determined by the board
2. A minimum fine of \$500.00 (five hundred dollars) will be levied for road weight limit violations. All fees and costs associated with collection of fines will be applied against the property of the Heritage Lake Association member responsible for contracting the overweight vehicle.

Limits are in place to reduce road damage when they are most susceptible - typically during daily freezing and thawing, and when the base is wet in the spring

Winter Weight Limits - FHWA Vehicle Classes



Class 1 Motorcycles		Class 7 Four or more axle, single unit	
Class 2 Passenger cars		Class 8 Four or less axle, single trailer	
			
			
			
Class 3 Four tire, single unit		Class 9 5-Axle tractor semitrailer	
			
			
Class 4 Buses		Class 10 Six or more axle, single trailer	
			
		Class 11 Five or less axle, multi trailer	
Class 5 Two axle, six tire, single unit		Class 12 Six axle, multi-trailer	
			
		Class 13 Seven or more axle, multi-trailer	
Class 6 Three axle, single unit			
			
			

Reminders



- Weight limits are still in effect
 - Clean out leaves and debris from ditches, ravines, and driveway culverts
 - Use caution during construction projects
 - loading, unloading, running equipment
-



BACKUP

FAQ



- Will Tazewell County maintain and/or own the roads?
 - HLA Roads remain private, the SSA is only a funding mechanism. The county will not be maintaining the roads. They are only responsible for: oversight of road plans and approvals SSA fund allocations. SSA funds must be used according to state law and county ordinances.
- Will the SSA fund repair/maintenance costs?
 - The SSA will fund most repair and maintenance costs. There are small expenses such as cold patch, minor ditch repairs, etc, that are much more cost effective if performed by the HLA maintenance staff. Assuming successful reconstruction, pot holes will be few and far between.
- Can the county increase the SSA tax above \$715/year/member?
 - The Development Agreement, SSA Ordinance, and the Bond documents state that the per member tax will not exceed the \$715.00 limit per member per year or a total tax levy of \$438,295 for all members ($\$715 * 613$ members). Ordinances: E-17-111 & E-17-123
 - In the case that the tax levy collected does not satisfy the debt service to retire the bonds, there are provisions that allow the county to raise additional taxes to satisfy the debt service.

FAQ



- Can the SSA bonds be purchased on the open market?
 - The SSA loan was offered to several area banks, **not** on the open market. Morton Community bank loaned the money for this project. The SSA is actually structured closer to a construction loan, where funds are available, but aren't withdrawn until they're needed.
 - Who oversees and manages the operation of the SSA, submits appropriations, and tax levy ordinances for the SSA?
 - The 6 member SSA commission which is made up of 3 members from the county and 3 appointed by the HLA board.
 - Will the HLA annual road fund fee be in place in 2018 and beyond?
 - The 2016 SSA motion at the annual meeting set the annual road fund fee at \$0 once the SSA is in place. The SSA is now in place, the road committee does not have plans to increase the yearly road fund beyond \$0.
 - Remaining funds in the road fund account will stay in place to be used for small maintenance jobs.
-

FAQ



- How is the tax levy split to pay for the bond and maintenance expenses?
 - Per the SSA ordinance (E-17-108, Section 10), the total tax levy is first used to satisfy the principal and interest of the bond, then \$1000 per year of county administrative fees. Any remaining funds are then transferred to the maintenance reserve account.
 - Any underpayment in the tax levy will result in underfunding of the maintenance reserve account. There is a provision to use the maintenance reserve account if there are any deficiencies in payment of the principal and interest of the bond. Analyses have been completed to show that there's a low probability of this occurring.
 - These accounts will be monitored by Tazewell County and the SSA commission. The HLA board of directors and membership will be notified if any problems arise in regards to bond payment and/or future maintenance obligations.
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SSA Tax Levy, Cont'd

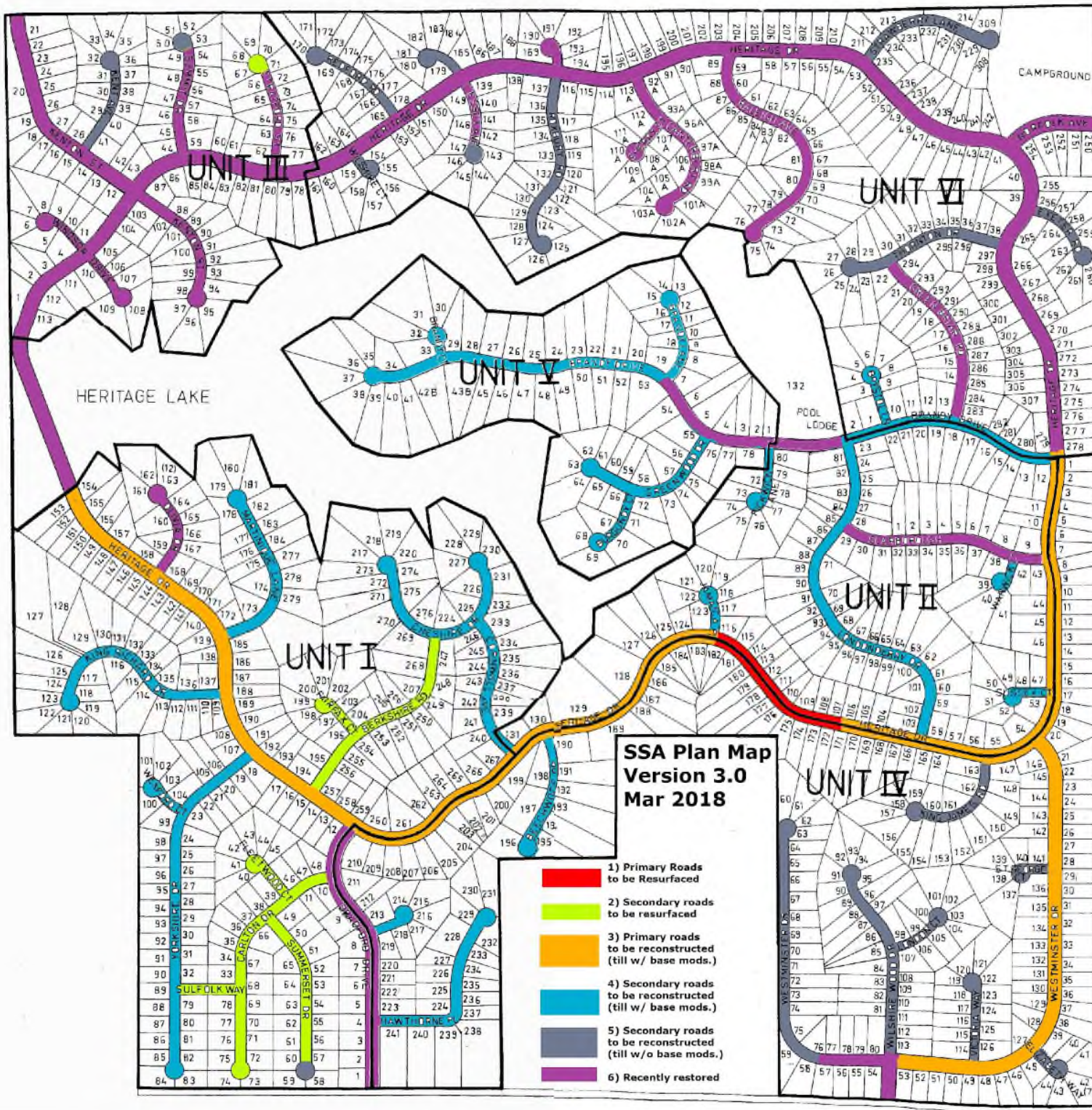


- Levy per member increased because of the reduction in the number of members
 - Tax levy is the same between 2020 and 2021 tax years
 - Tax levy is determined in Aug, approved in Sept/Oct
 - County fiscal year is Dec to Nov
 - Tax levy will fluctuate year over year, based on number of members and actual expenses and revenues
-

SSA Commission



- Tazewell County formed a commission:
 - Oversee and manage the operation of the SSA
 - Annually submit appropriation and tax levy ordinance for the SSA
 - Public meetings several times a year
 - Current Members:
 - Mike Deluhery, County Administrator, Chair
 - Greg Menold, County Transportation Committee Chair
 - Dan Parr, County Engineer
 - Brad Reed, HLA Rep
 - Jim Flynn, HLA Rep
 - Bonnie Lemke, HLA Rep
-





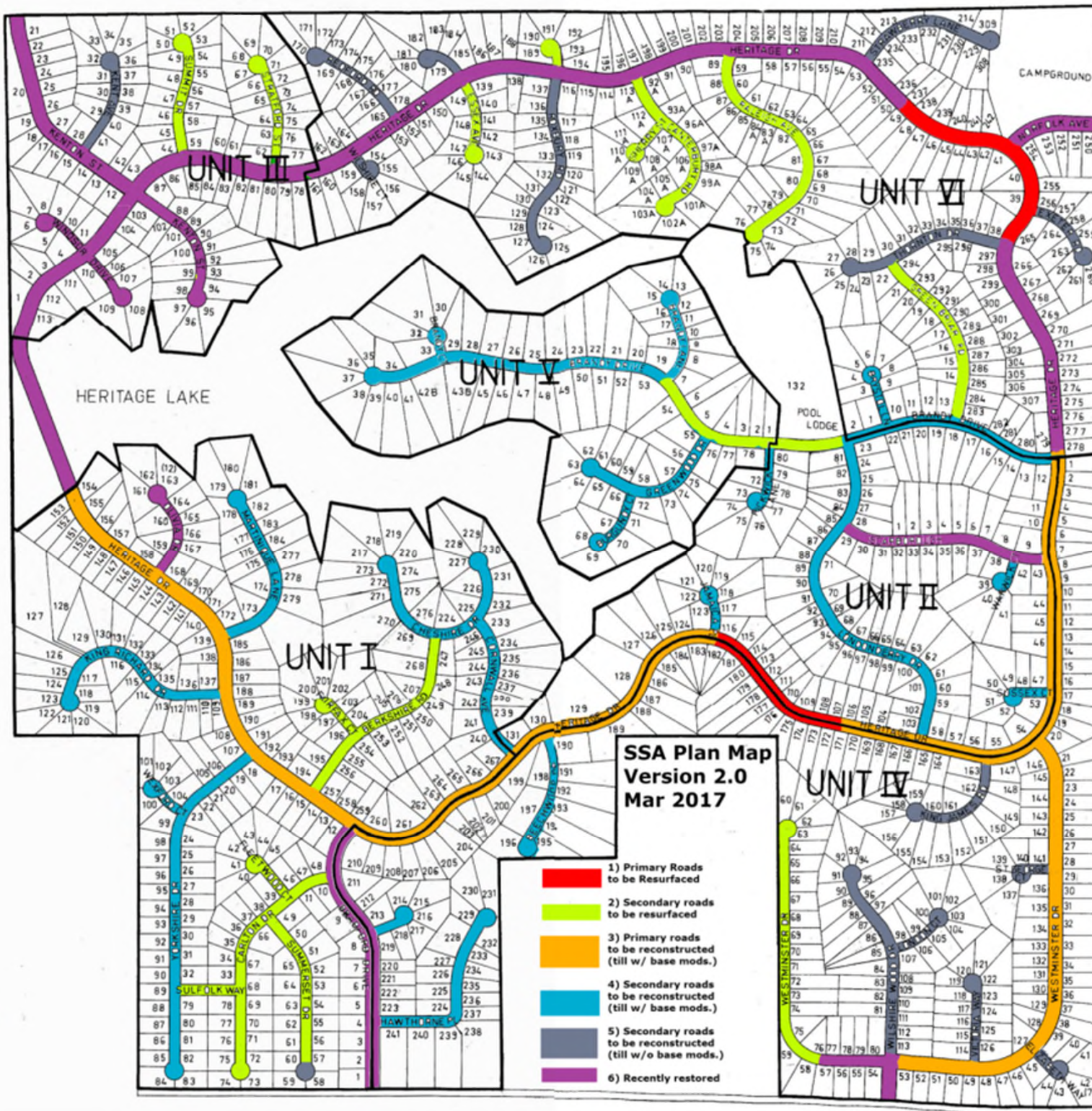
2016 Road Fund Motion

The Reserve Road Fund Assessment shall remain in effect at \$500 through 2016. If the County Tax billing cycle begins levying the SSA Tax to Heritage Lake Association members, the Reserve Road Fund will go to \$0. If the SSA is disapproved, the Reserve Road Fund will return to \$123.58 adjusted for the CPI. Budget priority for the Reserve Road Fund shall be given to fund costs associated with creation of the SSA as well as maintenance deemed necessary to preserve road integrity before SSA funding and emergency repairs of the roads.

2017 Road Fund Proposal



A Reserve Road Fund Assessment of \$500.00 shall be assessed to all members in 2017. The assessment will apply one time to each individual member regardless of the number of lots owned. Budget priority for the Reserve Road Fund shall be given to pay for costs associated with resurfacing roads, creation of the SSA, and reconstruction of ditches and culverts in advance of road improvements planned under the SSA. This billing will be due on July 1, 2017.





Heritage Lake Association 2025 Accomplishments

March 14, 2026

2025 Accomplishments



- Spillway rack structure and boat ramp repairs/dredging
- Office - many questions answers, bills and invoices processed, stickers distributed, etc
- ECC - permits reviewed and approved
- Required legal updates
- Quickbooks update
- Lodge HVAC, Flooring, and insulation
- New pool furniture
- Social Committee Events
- Kubota Side by Side
- Over 50 culvert cleanout and inspections
- New bench at the dog park using a fallen tree there
- Repaired and added steps at dog park
- Cleaning and crack repair on tennis court
- Repair of fishing docks, 1 completely overhauled
- Ongoing activities include mowing, plowing, removal of trees and limbs, maintenance of HLA equipment, cleaning and maintenance of restroom facilities at beach and campground as needed.



Thank You to Our Volunteers

- Debra Mielke
- Kurt Lemke
- Dave Riggert
- Marvin Theobald
- Andrew Clinton
- Amy Kent
- Cam Stalzer
- Cristy Hasty
- Tiffany Masters
- Matt Cagle
- Mark Belsley
- Joe Woodrum
- Jim Flynn
- Bonnie Lemke
- Dusty Schmidgall
- Environmental Control Committee
- Social Committee
- Conservation Committee
- Road Committee & SSA
- Pool Committee
- Trash Committee



Heritage Lake Association

Long Term Infrastructure & Amenity Plan

- Protecting Our Assets
- Preserving Property Values
- Planning Responsibly

Why This Plan Matters



Protect the pool,
dam, and lake
infrastructure



Prevent costly
emergency repairs



Phase improvements
responsibly over
time



Preserve property
values across the
community



Avoid large loans
and interest
payments

Secondary Spillway Project

- Why? This is the second part of a two-part project required by the IL DNR to bring our dam up to current standards
- When? Must be completed prior to 2030
- How Much? \$1M to \$1.7M





Dredge the Lake

- 1.) End of Raleigh Ave
- 2.) End of Sandy Beach
- 3.) End of Jamaica Place



Current Conditions End of Raleigh Ave



Current Conditions End of Sandy Beach



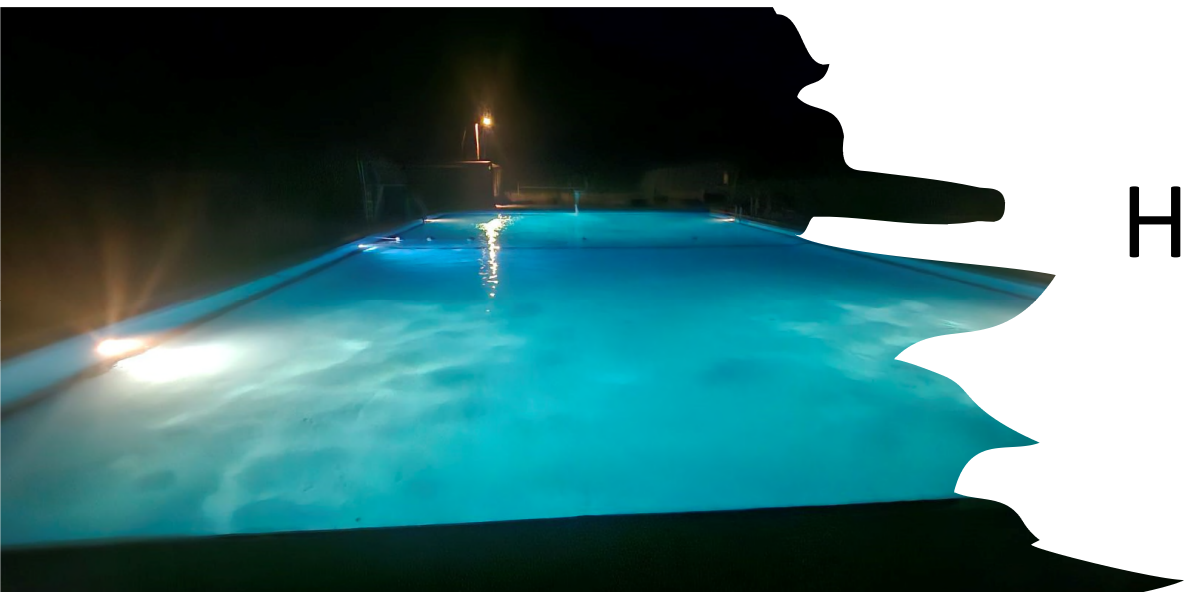
Current Conditions End of Jamaica Place



Tier 1: Critical Infrastructure (Years 1–5)

- Lake & Dam Protection
- **Secondary Spillway — \$1.0M – \$1.7M**
- **Targeted Dredging — ~\$1.5M**
- Shoreline Rip Rap Stabilization — \$100,000
- New Boat Ramp — ~\$50,000

- Estimated Tier 1 Investment: \$2.65M – \$3.35M



HLA Pool

Tier 2: Pool Facility Preservation (Years 3–8)

- Repair & Extend Life Option
- Pool Liners — \$175,000 – \$200,000
- Skimmer Repairs — \$150,000 – \$175,000
- Pool Resurfacing — \$60,000 – \$80,000
- Total Repair Strategy: **\$385,000 – \$455,000**
- OR
- Full Pool Renovation: **\$1.3M – \$1.7M**

Tier 3:
Community &
Recreation
Improvements
(Years 5–10)

- **Lake Amenities**
- Fishing Docks
- Boat Ramp Parking Lot Paving
- **Lodge & Facilities**
- Lodge Bathroom Renovations
- Lodge Parking Lot Paving
- Lodge Basketball Court Improvements

Tier 3 Continued

Recreation

- Tennis Court Resurfacing
- Pickleball Court
- Dog Park
- Campground Improvements
- Frisbee Golf Course
- Beach Enhancements
- Sand Volleyball Courts
- Playground Improvements
- Pavilion Improvements

Lake Association Comparison

Heritage Lake Association

- Established in 1972
- Total Lots 1118
- Total Homes 600
- Total Lake Acreage 85
- Amenities: pool, lodge, lake, beach, tennis courts, playgrounds, pavilions, baseball diamond, frisbee golf, dog park, campground
- Association Fee \$315.39/lot
- Lake Fund Fee \$84.75

Lake Camelot

- Established in 1969
- Total Lots 1043
- Total Homes 620
- Total Lake Acreage 87
- Amenities: pool, clubhouse, lakes, beach, tennis courts, playground, pavilions, baseball diamond, campground
- Association Fee \$1,149.50
- *2017/2018 Special Assessment to all members between \$3,000 to \$3,5000 for Pool Renovation*

Projected
Investment
Range

Repair Strategy:
~\$3.0M – \$4.0M

Full Renovation
Strategy: ~\$5.0M+

Closing

How do we want to
move forward with
protecting and
preserving our
amenities?

Heritage Lake Association Officer Appointment

	Date: 14 Mar 2026				
	Start Time: 11:30 AM				
	End Time: 11:40 AM	Motion/Vote to Adjourn: CH1/ TM2			
Position	Nominees	Final Name	Motion	Second	Aye Nay
Officers					
President (cannot hold another position)	Tiffany Masters	Tiffany Masters			
Vice-President	Matt Cagle	Matt Cagle			
Treasurer	Amy Kent	Amy Kent			
Secretary (cannot hold another position)	Cristy Hasty	Cristy Hasty			
Other Officers (optional)					
Additional VP or Assistant Secretary					
Additional VP or Assistant Secretary					
Additional VP or Assistant Secretary					
Additional VP or Assistant Secretary					
Directors					
Maintenance	Matt Cagle	Matt Cagle			
Outdoor Amenities	James Grant	James Grant			
Pool & Lodge	Josh Kitterman	Josh Kitterman			
Zoning & Security & Technology	Clyde Schall	Clyde Schall			
Key Contacts					
Attorney Contact	Tiffany Masters	Matt Cagle			
Accounting Contact	Amy Kent	Cristy Hasty			
Collection Contact	Amy Kent	Cristy Hasty			
Other Responsibilities					
Admin/HR	Cristy Hasty	Josh Kitterman			
Office Organization	Cristy Hasty	Tiffany Masters			
Social Media	Cristy Hasty	Amy Kent			
Social Committee Contact	Cristy Hasty	Amy Kent			
HLA Website	Tiffany Masters	Josh Kitterman			
Meetings					
Monthly Board Meeting Date and Time	3rd Tuesday of Month @ 6 PM				