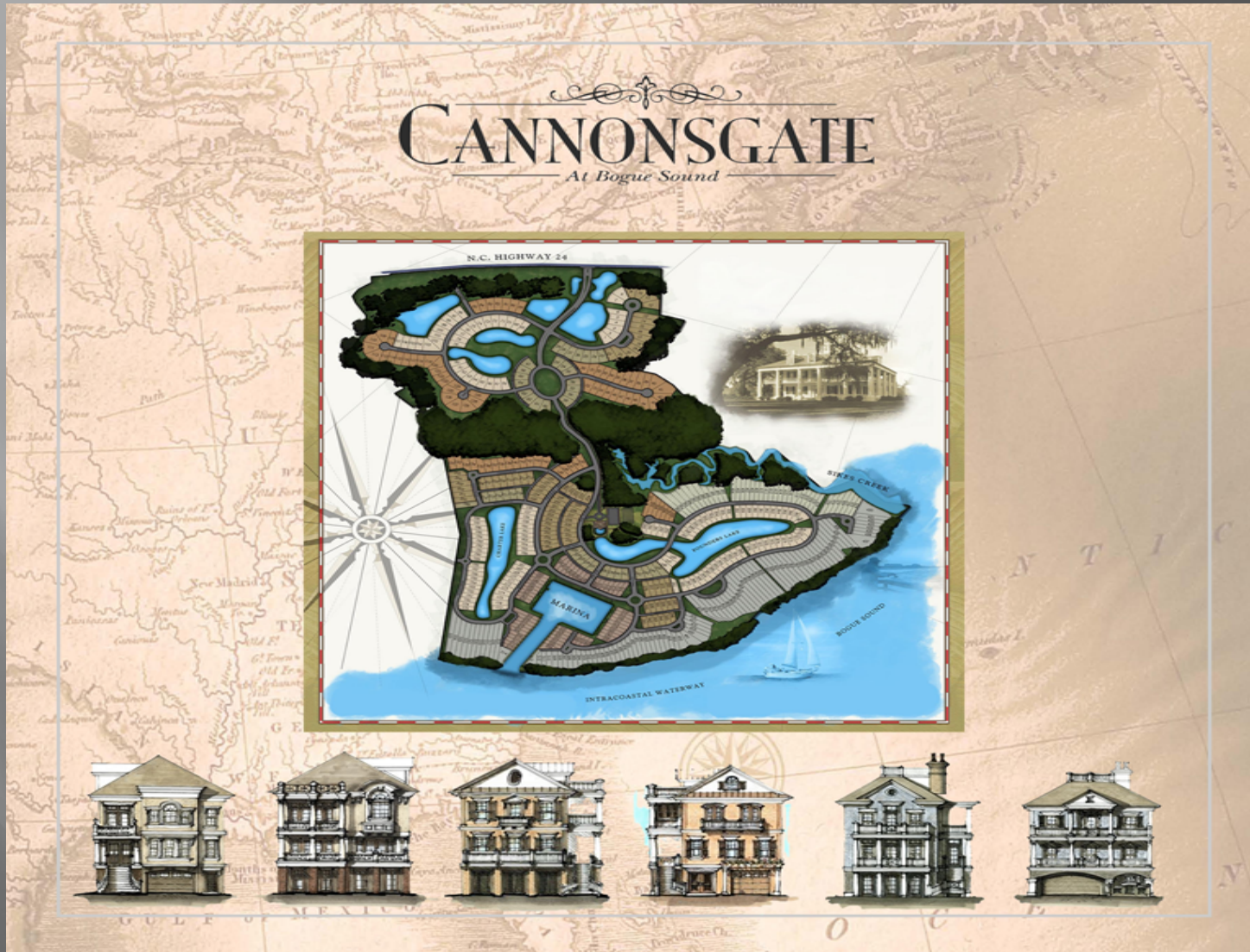


ARCHITECTURAL REVIEW BOARD SERVICES FOR PLANNED COMMUNITIES ORIENTATION



According to the Community Associations Institute, in 2016 more than 69 million Americans resided in approximately 342,000 association-governed communities, which included among other neighborhood types, city-size master-planned communities.

Undeveloped parcels in these communities currently represent a sizeable percentage of the ready to build single family home sites nationally.

Most all of the communities are governed by
Home Owner Associations and their Board of Directors

Many have Architectural Review Boards

Most Architectural Review Boards do not use Architects
as Paid Consultants to assist the review process

The Goal of this presentation is to show why it is essential for these communities to have architects consulting on their review boards

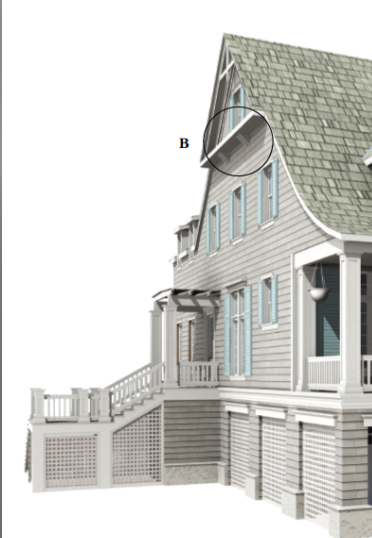
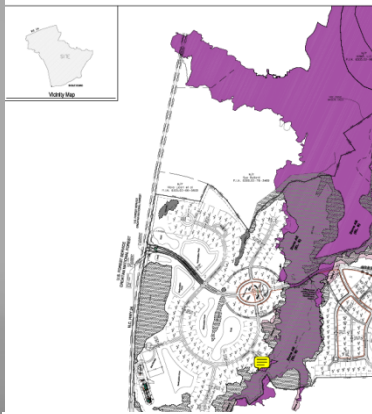
Why consulting is of value professionally and financially to architects

Why this service is invaluable in meeting the goals of the 2030 challenge and for ensuring a sustainable future.

AND FINALLY, HOW TO GET YOUR FIRM
ENGAGED IN THE BUSINESS OF PROVIDING
PROFESSIONAL CONSULTING SERVICES
TO PLANNED COMMUNITIES
FOR A REASONABLE PROFESSIONAL FEE

**WATER RIDGE SU
PHASE II**

THOSE PORTIONS OF SECTIONS 30 AND 31, TOWNSHIP 27 SOUTH, RANGE 20 EAST



WATERBRIDGE

PLANNING A COMMUNITY

Architectural Review Committee Design and Construction Guidelines & Review Procedures and Applications



Carolina Forest
Myrtle Beach
Horry County, South Carolina
January 2013 Edition



Chapter 47F.
North Carolina Planned Community Act.
Article 1.
General Provisions.

may be cited as the North Carolina Planned Community Act. (1998-199, s. 1.)

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DECLARATION OF PROTECTIVE COVENANTS, RESTRICTIONS, EASEMENTS, CHARGES AND LIENS FOR WATERBRIDGE

BY-LAWS

OF

WATERWAY PALMS PLANTATION HOMEOWNER'S ASSOCIATION, INC.

Article I

Name, Principal Office and Definitions

Name. The name of the Association shall be Waterway Palms Plantation Homeowner's Association, Inc. (hereinafter sometimes referred to as the "Association").

Principal Office. The principal office of the Association in the State of South Carolina shall be located in the County of Horry. The Association may have such other offices in any other county in the State of South Carolina as the Board of Directors may determine or as the Association may require.

Definitions. The words used in these By-Laws shall have the same meaning as such words have when used in the Declaration of Protective Covenants, Restrictions, Easements, Charges and Liens for Waterbridge (as amended, renewed or extended from time to time, and hereinafter referred to as the "Declaration"), unless the context shall prohibit.

Article II

Association: Membership, Meetings, Quorum, Voting, Proxies

Membership. The Association shall have two (2) classes of membership, Class A and Class B, as more fully set forth in the Declaration, the terms of which pertaining to membership shall be specifically incorporated herein by reference.

Architects typically have a business plan that focuses on securing a design commission for custom homes within the community



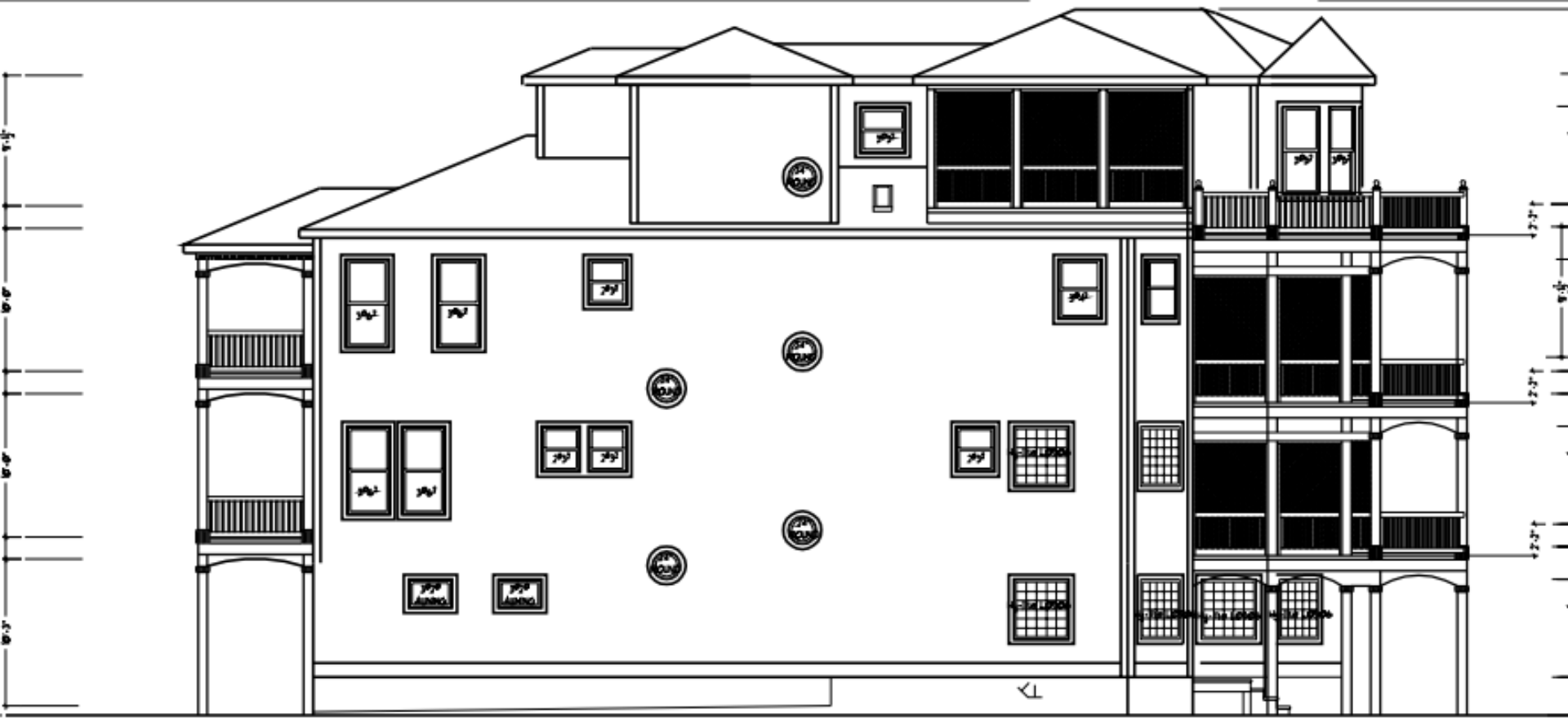
Often architects are asked to serve on ARB's by the developer at little or no fee and do so for an opportunity to have their name publicized



But more often than not, the developer also has a relationship with builders who will bring their own “designer” or “drafting service” to the client with the argument that they need to control the project cost



LEFT SIDE ELEVATION



From early 2009 to 2104 planned communities across the US have experienced unprecedented foreclosures and short-sales of homes and undeveloped lots.

Developers in many cases simply abandoned their planned communities prior to fulfilling their legal obligations to owners.



Even where developers have completed their obligations and turned the community over to owners...

The lingering fear is that the large number of lots purchased as foreclosures is encouraging the owners and their builders to try and bypass community standards, creating a blight of low quality housing in their community resulting in 'permanent devaluation'.



THIS CONCERN IS UNIVERSAL

Protecting values within a community is the first and foremost reason to retain an architect as a consultant...

- Architects understand architectural guidelines and know how to interpret them.
- Architects know how to interpret drawings and know the differences in building material quality and can provide guidance to the review board.
- Architects understand how to communicate their findings to an owner in a way that produces a better product.

Without this level of expertise on the Review Board there may not be a consistent interpretation of the Guidelines resulting in the potential for a lawsuit against the HOA

Another reason to have an architect as a consultant to the ARB is to protect the relationship of neighbors within the community.

Often communities with internal control of their ARB will find its members in conflict with their neighbors because of an ARB decision.

When the architect consultant becomes the voice of the ARB, the perception that a neighbor is the source of a problem is virtually eliminated.

When the architect serves as the voice of the ARB, a considerable amount of pressure is removed from the review committee and the HOA Board.

Serving as a consulting architect to a planned community is a professional service often overlooked by residential architects as a potential source of significant income

HOW SIGNIFICANT?

The Community Associations Institute reports that the total number of US Associations in 2016 was 342,000

This represents 26.3 million housing units
Of which approximately 14.5 million are single family homes

Planned or Unbuilt existing lots in planned communities represent almost 3 million home sites, most requiring an architectural review of submitted plans.

State	Number of Associations	Estimated Number of Residents in Associations
Florida	47,900	9,664,000
California	45,400	9,160,000
Texas	19,900	4,015,000
Illinois	18,600	3,753,000
<u>North Carolina</u>	<u>13,900</u>	<u>2,804,000</u>
New York	13,800	2,784,000
Massachusetts	12,300	2,482,000
Georgia	10,500	2,118,000
Washington State	10,300	2,078,000
<u>Arizona</u>	<u>9,500</u>	<u>1,917,000</u>
Colorado	9,500	1,917,000
Virginia	8,600	1,735,000
Ohio	8,400	1,695,000
Michigan	8,300	1,675,000
<u>Minnesota</u>	<u>7,600</u>	<u>1,533,000</u>
South Carolina	6,800	1,372,000
New Jersey	6,800	1,372,000
Pennsylvania	6,750	1,362,000
Maryland	6,700	1,352,000
<u>Missouri</u>	<u>5,400</u>	<u>1,089,000</u>
Wisconsin	5,200	1,049,000
Connecticut	4,850	979,000
Indiana	4,800	968,000
Tennessee	4,800	968,000
<u>Oregon</u>	<u>3,800</u>	<u>767,000</u>
Utah	3,360	678,000
Nevada	3,200	646,000

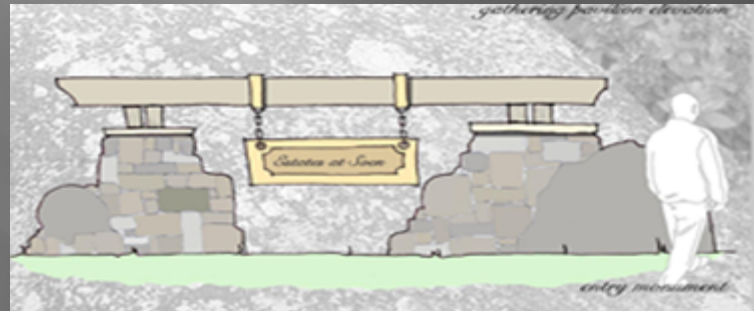
Between 2,000 and 3,000: Alabama, Idaho, Iowa, Kentucky, New Hampshire; 1,000 and 2,000 Delaware, DC, Hawaii, Kansas, Louisiana, Maine, Montana, Nebraska, New Mexico, Oklahoma, Rhode Island, Vermont; Fewer than 1000: Alaska, Arkansas, Mississippi, North Dakota, South Dakota, West Virginia, Wyoming.

The most significant reason to include service to a Planned Community's ARB in our Business Plan is because it gives architects the opportunity to influence the ongoing development of a community in ways that an architect focused on one home at a time may never have the opportunity to do.

- Communities of interest range from less than 100 lots to over 1000.
- There are conservatively over 3 million ready to build home sites in the US where an architect's influence is needed if only to promote sustainability.
- Most communities were created for custom homes where there was no incentive for the developer to promote sustainable design
- Planned Communities are grossly underserved by professional efforts to promote sustainability.

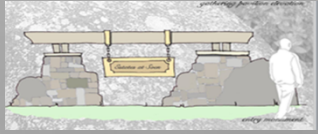
BY SERVING ON AN ARB, THE ARCHITECT CAN EDUCATE THE REVIEW COMMITTEE AND INFLUENCE REVISIONS TO COMMUNITY DOCUMENTS IN ORDER TO PROMOTE MORE SUSTAINABLE DESIGN

GAINING ACCESS TO A COMMUNITY



THE GATE KEEPERS

The Developer:



- You can identify a developer controlled community by watching for offerings of lots by known developers in your community.
- By speaking with builders you know who build custom homes.
- By looking at the Secretary of State's listing of community HOAs to determine if the developer is still the HOA's "registered agent".

The incentive for the developer to speak to you about a paid service on their ARB is for the most part one of liability.

- Sales departments and agents often will promise more than they can deliver, including an implication that a prospects internet home plans will meet the Guidelines.
- Owners already invested in homes, seeing the developer approve a lesser value home not in accordance with the Guidelines are the source of many law suits against developers.

The Self-Managed Association :



The self managed community consists of owners who voluntarily take on the responsibility of the HOA & ARB

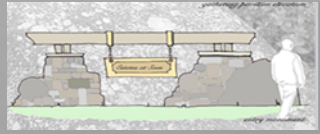
This type of community is not easy to locate in the normal course of marketing. The Secretary of State's office will often list a home owner as its registered agent; or you can simply call an owner, advise that you are an architect, and ask for an officer contact.

The incentive for the HOA to speak with you is to reduce confrontations between owners and their elected volunteer boards.

While it may be easy to send out notifications that association fees are due, it is more difficult to tell a potential neighbor that their "dream home" design falls short of the Architectural Guidelines and will likely never be approved.

Marketing efforts to these communities may not be necessary in that once you become known for providing review services these communities will find you.

The professionally managed association:



Likely the largest source of potential work, knowing the management companies in your area and building a relationship with them will net you the most opportunity for work.

Communities with Association Managers assisting them may have the management company's name at their entry; or the Secretary of State's listing for the HOA's Registered Agent may be the Association Manager.

However, don't expect to find much on their website to give away their list of clients. Association Managers are very protective of their associations...meaning they do not want to divulge to other management companies who their clients are.

- AM business is very competitive, and in short order an owner's complaint or another AM's reduced fees might well result in their dismissal.
- However, building a relationship with not only the AM company but their staff will have long term benefits resulting in your obtaining more work in other communities.

Representing yourself as a knowledgeable professional:

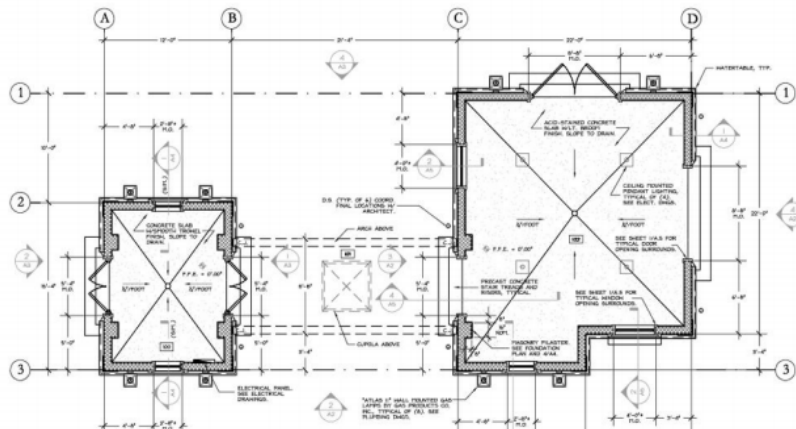
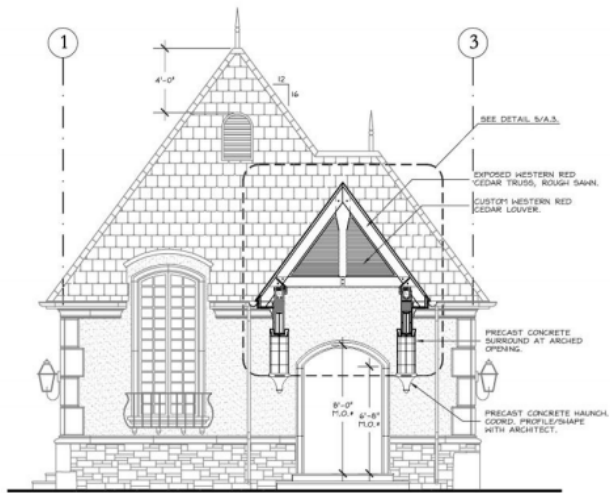
Part One:

- I. Gain an understanding of the content of typical Conditions, Covenants and Restrictions (CCRs) and identify your state laws and regulations associated with Association Member Rights.
- II. Gain a working knowledge of the Architectural Guidelines.
- III. Conduct an Architectural Review based on sample CCRs and Guidelines.

AFTER THOUGHTS

Rebuild Your portfolio:

Graphics are key. Show how details make for Great Architecture.



Manage the information:

Show you have the ability to communicate with all parties.

Invest in an Information Management System that will receive submissions, protect records and send automated notifications to owners and committee members

The screenshot displays the 'Charette Architects Compliance Review' web application. The top navigation bar includes 'Home', 'Communities', 'Members', 'Reviews', and 'Archived Reviews'. The main content area is titled 'Reviews' and features a search form with fields for 'Registrant Email', 'Registrant First Name', 'Registrant Last Name', 'Community' (set to 'ALL'), and 'Site Number'. Below the search form is a table listing review entries with columns for 'Community Name', 'Lot#', 'Status', 'Registrant', 'Date/Time Submitted', and 'LastModified'. Each row includes 'View File' and 'Archive File' buttons. The table data is as follows:

Community Name	Lot#	Status	Registrant	Date/Time Submitted	LastModified
Waterway Palms Plantation	-5580	Not Approved - Revise and Resubmit	Name: Marissa Winship Email: mwinship@ssoserialhomes.com Phone: 843-293-4445	8/20/2012 2:24:59 PM	10/2/2012 11:52:00 AM
Cannonsgate at Bogue Sound	420	Approved	Name: Howard and Marjorie Bogey Email: hrbogey@gmail.com Phone: 910-458-2233	8/18/2012 12:31:19 PM	9/30/2012 10:29:48 PM
Woodland Bay	Shukla	Approved	Name: Tom Giblin Email: tgiblinom@bellsouth.net Phone: 704-541-5682	8/23/2012 4:19:10 PM	9/30/2012 7:20:30 PM
Waterbridge	531	Approved with Conditions - No Re-submittal Required	Name: Edward Friend Email: eddie@honestyexcelibur.com Phone: 843-235-9879	8/29/2012 10:48:24 AM	9/28/2012 8:59:05 AM
Waterway Palms Plantation	461	Approved	Name: Jack Conaty Email: conaty79@coast.net Phone: 843-235-9651	4/28/2012 11:46:04 PM	9/28/2012 8:57:58 AM
Waterbridge	583	Approved with Conditions - No Re-submittal Required	Name: Denis Paukov Email: denispaukov@yahoo.com Phone: 843-333-0168	9/10/2012 12:41:59 PM	9/28/2012 8:56:53 AM

Below the table is a detailed view of a specific review for 'Howard and Marjorie Bogey' at 'Cannonsgate at Bogue Sound: 420'. The status is 'Approved' and the submission date is '8/18/2012'. The 'Documents' section lists various files uploaded by the registrant, including PDFs and JPGs, with their respective dates and times. The 'Notes' section is currently empty. At the bottom, the 'Reviewer Actions' section includes a 'SELECT FILES' button and radio buttons for changing the review status: 'Approved', 'Approved with Conditions - No Re-submittal Required', 'Approved with Conditions - Re-submittal Required', and 'Not Approved - Revise and Resubmit'.

<http://www.trijazel.com/products/architecturereview>

Representing yourself as a knowledgeable professional:

Part One:

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