

## **Review Board Services Workshop**

### **Session with Community Leaders**

(Contributions from Neil Brennan, President Reflection Pointe HOA, Belmont, NC  
And Bill Higgs, Chair Skyecroft ARC, Weddington, NC)

1. How do communities pick the members of the Architectural Review Committee (ARC)?
  - a. Current members discuss which neighbors might have the interest and have some skill that might help.
  - b. Obtain their resume and discuss the commitment required.
    - i. Insure they have a desire to help the community.
    - ii. Obtain their resume and discuss what skills they bring with them.
    - iii. Review the community Vision statement with them.
      1. HOA Board needs to develop.
    - iv. Review the ARC Mission statement that supports the Vision statement with them.
      1. HOA Mission Statement – This should be developed so the Board understands what it should do to deliver the Vision.
      2. ARC Mission Statement designed to insure we help deliver the Vision and the HOA Mission. Note: the Board may have other committees set up similarly...Security, Landscaping/violations, Marketing, Activities, etc.
        - a. Example: Deliver luxury European-styled estate homes in the \$1-3 million range and modifications through the use of a preferred builder program and architectural guidelines.
        - b. Example: Construction of new homes and modifications to existing homes will be controlled to minimize negative impact to the community.
    - v. Review the ARC goals established to insure delivery of the Mission statement. The ARC has established the following goals to support the Vision and Mission of the community:
      1. Provide and implement the architectural guidelines –(Architect Consultant).
      2. Conduct monthly ARC meetings (1.5 hour meeting) and attend HOA Board meeting – (ARC Chair Person).
        - a. Agenda – (ARC Chair Person).
        - b. Notes –(ARC Member).
      3. Conduct quarterly Participating Builder meetings – (ARC Member).

- a. Prepare Agenda.
      - b. Communicate the meeting time and work to get full participation..
    - 4. Utilize professional architect for support –(ARC Chair Person is contact).
    - 5. Spreadsheet showing status of homes per the guidelines – (ARC Member).
    - vi. Review the tasks required to deliver each of the goals.
    - vii. Review which goal the person would be responsible for and the time commitment...normally less than six hours per month.
  - c. Normally recommended by the ARC, but appointed by the Board.
  - d. Normally stay away from Lot owners because their interest is more on personal return on investment than the community.
  - e. Definitely stay away from having a Builder as a member due to potential with other builders.
  - f. Want someone who will help uphold standards in order to keep the community homogeneous...e.g.no section of “starter” homes in a community that has high end homes.
  - g. Recommend the candidate to the Home Owner’s Association (HOA) Board.
2. Selection of an Architect consultant.
  - a. Committees want an experienced architect with a strong resume.
  - b. They should be mature enough to deal with facts and not get personal with builders, homeowners, ARC or the HOA Board.
    - i. Builders will always push the limits in order to lower their cost.
    - ii. Homeowners will have concerns and complaints “out of left field” that need to be assuaged.
  - c. Familiar with State Statutes, CCRs, ARC Guidelines and can use them for black and white requirements.
  - d. What applicable experience do they have?
  - e. Bring your “toolbox” of Guidelines, checklists, forms and stage-gate to show how you can simplify 90% of the work and make it flow smoothly.
    - i. Show how it helps the ARC manage the design-build process.
    - ii. Show how it helps Builders make a profit.
    - iii. Show how it helps the new homeowner have less frustration and end up with a great home that fits well in the community e.g. they will not have a “named” home...the Mediterranean, the weird roof house, etc.
    - iv. Show how it helps the community grow in a good manner.
  - f. How would they help the ARC and the community get a good product?

- g. Do they believe in having a good process with steps and checklists tied into guidelines with specific requirements?
  - h. Do they believe in working as part of a team that includes the ARC and Builders.
- 3. Stage-Gate.
  - a. Checklist of deliverables with level of detail required for approval in order to pass a gate.
  - b. Deliverables from the builder are reviewed by the Architect and the ARC for compliance with the guidelines.
    - i. Deliverables are either Approved, or Approved with Conditions, or Not Approved...Revise and Resubmit.
    - ii. The approval designation with explanation is provided in a letter from the Architect to the Homeowner with copy to the builder.
- 4. Builders work in a number of communities.
  - a. They will not be familiar with everything and will probably not read a 50 page Guideline.
  - b. Need to provide checklists for submittals and inspections.
  - c. Need to provide forms for clarity of requirements.
  - d. Make it easy for the builder and the designer to get it right the first time by reading and filling out the forms and checklists.
    - i. Where appropriate refer to the paragraph in the Guidelines that a checklist or form item is enforcing.
    - ii. Where appropriate clarify a checklist or form item with the reason for the request do to past experience of builders or designers doing it wrong.
  - e. Need a list of "rules" for builders pulled out of the Guidelines with reference paragraph.
  - f. The goal is to help builders and designers get it "right" the first time in each stage of the project through good communications of expectations as early as possible. We want no surprises for either side.
- 5. All communication with the Homeowner and Builder from the ARC is through the Architect.
  - a. Keep ARC out of any confrontation over design and build.
  - b. Reduce ARC administrative tasks.
- 6. Classes the Architect should teach to the ARC periodically.
  - a. Reading the different drawings and what the ARC should be looking for.
    - i. Insure these things are covered in the Guidelines.
    - ii. Understand the latitude allowed around the requirements.
  - b. Site staking things to look for.
    - i. Home location in relation to other homes or potential homes.

- ii. Drainage to protect the home and surrounding homes.
  - iii. Trees that stay and which ones are removed.
  - iv. Overall height of home compared to adjacent homes.
  - v. Invite adjacent neighbors to understand what will be built next to them.  
(questionable since non-members should not influence the ARC decision process)
- c. Walkabout: Schedule quarterly to help everyone on the committee look over the consequences of their decisions. As examples:
  - i. How the cut and fill worked out for drainage and the “look” of the site.
  - ii. The “mass” of the home.
  - iii. The details of the homes.
  - iv. Identify any adjustments needed for the Guidelines.
- d. House tips. (Optional)
  - i. Provide a list that can be given to the Homeowner to help them.
  - ii. May wish to provide guidance on what an owner should be aware of when hiring a contractor, including introducing them to some management tools such as a schedule of values and the importance of obtaining certified releases of liens.
  - iii. May help the ARC have some influence over the internal finishes of the home in order to help hold neighborhood values.