

Carolina Trace Association, Inc.

December 28, 2020

2020 Annual Report

In accordance with Carolina Trace Association (CTA) Bylaws Article 5 section 2.d it is my pleasure to prepare this annual report of CTA's actions and efforts for review and distribution by our individual Property Owner Associations. This report is intended for widest distribution to all owners and residents of the community.

Among the CTA Officer personnel for 2020, there was a lot more stability and continuity than in 2019 but there was some shuffling among the positions. I remained as President, Cal Saltzman moved from Treasurer to Vice-President, Oscar Roberto moved from Secretary to Treasurer, and we welcomed Kate Woods as the new CTA Secretary.

- I will emphasize again how the continuity of changing people within the same role is helped by maintaining a single office, non-personal email address. We did have to create a new alternate email for the Vice-President, but now along with the other email addresses they will be passed to the new people filling those roles: ctaprestr@gmail.com; ctavicep@gmail.com; ctatreasu@gmail.com and ctasectr@gmail.com.
- The major event that overshadowed this year was obviously COVID and I am proud of how the entire community has responded. The CTA Board and our 18 POAs have adapted to the new technology of web meetings and have continued to perform their community business. For us, our local CERT leader Penny Turner actually started the initiative for using Zoom conferences and CTA has piggybacked on their account for our monthly meetings for most of the year. If there are other communities that need to share or use web-meeting accounts for monthly meetings, please communicate about sharing, since paying monthly subscription fees for just one monthly meeting is not economical for most POAs.
- Another important achievement achieved by the Board overall was the approval of three Bylaw Amendments that adjusted the CTA operational calendar for Budget approval and Officer elections. A new version of the CTA Bylaws is being printed that reflect these amendments and will be distributed and posted on our website soon.
- The Finance Committee chaired by Oscar Roberto was once again essential in reviewing and recommending a 2021 CTA Budget that maintained assessments at the current level while planning for important projects such as the new automated South Gate, and infrastructure improvements to the Traceway road surface and the three large metal culverts near the Stonegate area will be encapsulated and preserved for another 50+ years. Finally and most importantly an outside review, quasi-audit was performed on the CTA Finances for the first time in a number of years. This review affirmed many of our good financial practices while making several additional recommendations that are being enacted.
- Our Traceway Roads and Maintenance Committee, chaired by Ernie Violon has continued to work hard and improve our various common areas belonging to CTA.



51 Traceway South, Gatehouse Plaza, Sanford, NC 27332

There are so many accomplishments that I will only list them briefly. Foremost is continuing to improve the North and South gate areas, which included more space for turnarounds to help the parents during bus stop operations, while also planning for the automation of the South gate which was already listed as an approved budget item for 2021. Another major project with much less community visibility was our exploration of new technologies to preserve our old, rusting metal culverts that would otherwise be dug up and replaced and are instead encapsulated and preserved. This technique is not ideal for all culverts since it's not cheap, but for those culverts that are buried deeply or might block an important roadway for an extended time, we will continue to explore their use--- including the three large culverts near Stonegate Pond as mentioned earlier. Our large Carolina Trace sign is now lighted on both sides with solar LED floodlights. Various projects around the Gatehouse including a new paint job and new stanchions(lane dividers) were completed. Lots of re-painting of speedbumps, railing and various areas throughout Trace. A number of trees were removed and a large number of asphalt patches were made along Traceway, while a road sealant/preservative was tested along a small section of road that may be used in much larger quantities during 2021.

- The Security and Safety Committee, chaired by Cal Saltzman has continued to supervise our Gatehouse operations while also adding supervision of the North gate, which has been damaged several times this year. Let me be clear, both the Main Gatehouse area and the North Gate are under 24x7 video surveillance from multiple angles. While we continue to have property damaged, those cameras have been essential in documenting and tracking down the perpetrators of the damage and we have received reimbursement from every offender. Your assistance is greatly appreciated simply by calling the Gatehouse when you observe anything wrong around our gate areas and please specify the date, time and circumstances which we will use to verify on our audio/video recordings. This includes incidents inside the Gatehouse since that public/customer area is also under 24x7 surveillance. As our primary interface with the residents and visitors, the CTA Vice-President and Security Committee routinely investigate and review all complaints made regarding how our SPA contract guards represent us and provide customer service, and their efforts are deeply appreciated. One frequent concern lately has been about guards wearing masks at all times, the policies from their headquarters have been communicated frequently to their employees and it is important to realize that exceptions are written into the NC Executive Orders as well as the SPA corporate policies. Other initiatives to note this year was another change to the Gatehouse phone system that is cellular-based due to repeated failures of the internet phone service we had recently contracted. This cellular service has been much more reliable and also allowed us to implement a new voicemail system that has allowed us to improve Gatehouse efficiency and reduce wasted phone calls. Included in the 2021 budget was an authorization to purchase a new sticker reader for the main gate that would read the same sticker used for the North and South gates, so details on that plan will be forthcoming in 2021 also! Finally, in what may be too much information but is important for the community to know, there are several difficulties in maintaining a functional work area like the Gatehouse on what is essentially an island. The electrical power, water and sewage services are piped along our bridges to that Gatehouse over long distances and we have had some issues with that infrastructure this year. One issue was a small break in our



sewage pipe which leaked into Lake Trace, and while promptly repaired, we are still pending a final decision from the State Division of Water Resource on any possible fines or reparations we may face.

- At the August 2020 CTA meeting a new Trace Lake and Dam Committee (TLDC) was authorized and created by the CTA Board to improve maintenance of the Trace Lake and Dam areas. This committee is chaired by myself and has researched and made recommendations to the Board including additional funding to facilitate access to the south portion of the Lake Trace Dam since the previous access point crossed private property without legal authorization or protection. The NC State regulatory authority has also recently inspected the Dam and made their own requirements known to the Carolina Trace Country Club, which has performed heavy maintenance along the north portion of the Dam and is awaiting our project to be completed on the south side of the Dam to enable access for their maintenance equipment and crew. Both the State and the Club are aware of our progress and I hope that access to the south side of the Dam is completed by the end of January 2021. This will not mean the work of the TLDC is completed, there are numerous other tasks being identified in order to preserve this essential asset of the Carolina Trace community.
- Our Financial summary report will be attached once the books are closed for 2020. I believe we continue to be in good financial strength, and while large expenditures are projected for 2021, some of these projects were required in our long-term capital engineering plan anyways. Proper maintenance of our asphalt and culverts now will help preserve and pushback planned expenses for replacement in the near-future.

In conclusion, I have reported throughout the year on continued business and residential growth in our region. There are a large numbers of jobs and homes moving into Lee County and I believe that Carolina Trace is primed to attract a good share of our own growth. I will expound more on this topic of growth and other ideas I have about the community at the end of January 2021 when I write my vision statement for the year. Carolina Trace is a large and complex community with dozens of people donating their time and expertise to making it better and more attractive to the growth that I feel we need to be attracting. I had originally committed to three years as CTA President and based on several factors and completion of a number of projects, 2021 will be my last year in office. I share this personal deadline because I will be actively looking for my replacement this year as well as other possible replacements for other hard-working volunteers in this community. If you are interested in my job or helping with any of the other numerous issues I have discussed in this annual report, please contact me so that we can discuss possibilities!

Cheers and Hoping for a Better 2021!

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