

I'On Assembly
Board of Trustees Meeting
Monday October 20, 2025
Executive Session 5:30 P.M.
Board Meeting 6:00 P.M.

AGENDA

<u>Discussion & Topic</u>	<u>Decision (Y/N)</u>
Homeowner Forum	
Call to Order	
Approval of September 8 Meeting Minutes	Y
President's Report	
<i>2026 Board Positions</i>	N
Treasurer Report	
<i>Review 9/30/25 Executive Dashboard</i>	N
<i>Vote to approve the 2026 Operating Budget</i>	Y
Amenities Report	
Landscape/Infrastructure Report	
<i>Vote to approve the proposal for replacing the fence at the Hospitality Pond</i>	Y
<i>Vote to approve proposal for trip hazards</i>	Y
<i>Vote to approve proposal for cleaning two storm drains</i>	Y
<i>Discuss the observation towers in the rookery</i>	N
Covenants Report	
<i>Vote to approve fining a property as discussed in executive session</i>	Y
IDC Report	
Communications Report	
<i>Vote to approve Civitas Award recipient as discussed in executive session</i>	Y
Secretary Report	
Adjournment	

I'On Assembly Board of Trustees Meeting
September 8, 2025 Board Meeting Minutes

Members Present: Tom O'Brien, Donna Davis and Roy Rathbun. Bob Adams and Stephen Wood were present via Zoom.

Members Absent: Lon Waggoner and Elaine Blaisdell-Taylor

Management Company: Emily Simpson and Nina Patton

Homeowner Forum: Ed Clem, 167 E Shipyard Road and Andy Minkin, 8 Edenton.

Andy Minkin joined to listen to the President's Report CV-9 update.

Call to Order: 6:00 PM by Tom O'Brien

Approval of Minutes:

Roy made a motion to approve the July 14, 2025, I'On Assembly Meeting Minutes. Donna Seconded. All in favor. The motion passed unanimously.

President's Report:

Tom discussed CV-9 and mentioned to date nothing has been filed with the Town of Mt Pleasant, and nothing can be done on CV-9 until a plan has been submitted and approved by the Town.

Tom made a motion to approve the revised appraisal offer from the Town of Mount Pleasant for a new easement for the new Mathis Ferry Trail. Bob seconded. All in favor. The motion was passed unanimously.

Treasurer Report:

Bob gave the report using the July 31st numbers due to the Board meeting being moved up a week earlier and the August financials were not ready as the date of the meeting.

He stated that we are on budget for the year and noted that there is a slowdown in home sales, noting there are 15 homes for sale.

Bob mentioned that there has been a decrease in CD rates from 4.3% to 4.15% in August and is predicting there will be more decreases in rates in September. Tom asked if there would be any benefit of locking in longer-term rates, to which Bob explained that six-month rates have typically been lower than three-month rates and the committee will continue to choose the better rate option.

Lastly, Bob mentioned a two-year T-bill expiring in November with a rate of 4.89%.

Amenity Report:

Donna received a call from the playground company, Just For Fun Playgrounds, and the last 3 pieces have arrived and will be installed soon.

The new fence at the Hopetown playground will be painted after the wood has dried and cured for a few months.

Donna noted that two new Polywood Adirondack chairs were purchased to replace the damaged ones on the marsh trail off Isle of Hope.

Lastly, Donna mentioned that Ruppert installed a path to the mailboxes in the Scramble, and Charleston Fence will repair the fence on the other side of the path where it was removed.

Landscape and Infrastructure Report:

Roy read the updates from the recent committee meeting, which was provided in the board packet.

Roy motioned to approve a proposal for 2 new retaining walls at the corner of West Shipyard and Ponsbury. Donna seconded. All in favor. The motion passed unanimously.

Roy motioned to approve the proposal from Ruppert for installing the Westlake Irrigation Pump. Bob Seconded. All in favor. The motion passed unanimously.

Roy also gave an update on the Bulkhead project by JGT, who informed us that the Town's Design Review Team is still currently reviewing the plans and are awaiting additional comments from other departments within the Town.

Covenants Report:

There was no report.

IDC Liaison Report:

Stephen noted that IDC approval was at 92%.

The IDC is reviewing roofing issues on Hopetown Road with attorney and will investigate the application.

Communications Committee:

The committee is currently working on the 2026 Directory which is scheduled to go to print October 1st. We are reviewing a new webpage called "Circle" as a possible dedicated social platform for I'On residents only.

Secretary: No Report

There being no further business to come before the Board of Trustees, the meeting adjourned at 6:22 pm. The next meeting will be on October 20, 2025, at 6:00 PM and will be held at 159 Civitas Street.

Respectfully submitted by _____
Elaine Blaisdell-Taylor, Secretary

Executive Dashboard 9/30/2025

Summary		Prior Year's Actuals					Annual Budget	YTD Actual	YTD Budget
Income Statement		2020	2021	2022	2023	2024	2025	Sep-25	Sep-25
Assessments	\$	914,400	\$ 1,066,800	\$ 1,143,000	\$ 1,254,000	\$ 1,368,000	\$ 1,368,000	\$ 1,026,000	\$ 1,026,000
IDC Revenue		34,300	48,475	37,750	38,700	79,300	40,000	\$ 28,550	30,000
Dock Closure Rev		16,800	26,600	39,550	26,600	64,250	50,000	\$ 31,800	37,500
Interest		23,954	22	2	6,312	17,970	5,000	\$ 19,032	3,750
Misc Income		32,879	17,350	28,367	20,326	32,395	13,025	\$ 29,678	7,019
Total Revenue	\$	1,022,333	\$ 1,159,246	\$ 1,248,668	\$ 1,345,938	\$ 1,561,915	\$ 1,476,025	\$ 1,135,060	\$ 1,104,269
Payroll, Administrative, IDC	\$	286,826	\$ 299,562	\$ 295,344	\$ 317,785	\$ 339,280	\$ 337,507	\$ 230,773	\$ 231,911
Legal & Professional		48,162	73,979	100,000	134,936	46,765	75,000	\$ 36,457	56,250
Landscaping & Maintenance		422,077	405,154	395,669	443,616	475,538	470,450	\$ 392,526	352,200
Utilities, Insurance, taxes		95,729	138,225	151,116	181,083	206,554	231,635	\$ 207,768	203,956
Reserve Contribution		41,500	192,192	202,033	208,520	220,049	241,052	\$ 241,052	241,052
Capital Projects		62,650	46,367	28,096	50,000	60,000	100,000	\$ 100,000	100,000
Total Expenses	\$	957,994	\$ 1,155,479	\$ 1,172,258	\$ 1,335,940	\$ 1,348,186	\$ 1,455,644	\$ 1,208,576	\$ 1,185,369
Net Surplus	\$	64,339	\$ 3,767	\$ 76,411	\$ 9,998	\$ 213,729	\$ 20,381	\$ (73,516)	\$ (81,100)

Total Operating Assets \$468,702.34

Total Reserve Assets \$3,535,175.26 (including ~\$78K for 2034 CC reno)

Creek Club Lease Term. 8/20/2033 \$1,000,000

Transfer Fees \$208,343.50

Amenities Report

October 20, 2025

Boat Docks-

- 97 boaters are registered for this boating season. Boaters can register in the l'On Assembly office, Monday-Friday from 9am-4pm.

Playgrounds-

- Just for Fun Playgrounds has completed the Scramble playground renovation. The final pieces of equipment were installed in mid-September.
- Charleston Fence installed a fence in the Scramble playground and they will return to stain the fence Charleston Green once the wood is cured and dry. They also made an opening on the fence on the Shelmore side of the alley for easier access to the mailboxes.

Landscape & Infrastructure Report

October 20, 2025

Updates from September 9 & October 14 Meeting

- The committee reviewed and approved the fall/winter annuals, along with a proposal for installing bollards and mulch to the area in front of the Hopetown playground.
- TruGreen has been contracted to spray Flight Control around both Eastlake and Westlake. Flight Control is a liquid goose repellent that modifies geese's behavior by creating both a visual and digestive warning when applied to grass. This deterrent helps geese find a different feeding site and is a safe, eco-friendly and effective way to manage geese.
- The new Westlake pump is scheduled to be installed on October 20. Once the pump has been installed, all landscape projects around Westlake will be completed.
- During the October 14 meeting, the committee reviewed and recommends approval of the following proposals:
 - o Replacing the fence around the Hospitality Pond (\$3,380-reserve expense) **VOTE NEEDED**
 - o Eliminate trip hazards in 3 areas on the marsh trail, Maybank Green and the alley behind McDaniel (\$10,519-reserve expense) **VOTE NEEDED**
 - o Clean storm drain in the Lonsborough alley (parallel to Braemore) and the alley parallel to Ponsbury by the club (\$4,500-reserve expense) **VOTE NEEDED**

Eastlake Bulkhead Update

- The Town of Mount Pleasant gave JGT some minor comments on the first set of plans for the bulkhead wall. Chris resubmitted the final copy of plans to the Town on October 3. On October 8, Chris sent an email from Barrier Island Engineering saying that CZC approval is not needed, they can proceed with applying for the clearing and grading permit as soon as the Town issues their approval.

Completed since September Meeting

- Ruppert has completed pruning along the marsh trail.
- The retaining walls at the intersection of W. Shipyard & Ponsbury have been replaced.
- The bench swings on Westlake were stained.
- Tidal South pressure washed the two missed bridges on the marsh on Hopetown.
- TruGreen applied the first application of Flight Control on September 26. They will be back the week of October 27th for the second application and the third application will be in late November.

October Covenants Committee Report

The Covenants Committee met on October 15th. All members were present.

The Covenants Committee is charged with assuring the Declaration of **Covenants, Conditions, & Restrictions** for l'On, as well as other rules laid out in the l'On Governing Documents, are followed to the benefit of the homeowners in the community. This involves helping homeowners understand and comply with established rules as well as offering a path to resolve issues as they arise. The documents also include enforcement tools when other attempts at resolution fail. The committee serves as unofficial advisors to the Board on matters involving interpretation of the Governing Documents as well as amendment of those documents as needed over time.

Currently there are 25 properties that have various violations. 15 remain OPEN , 11 are on Hold pending re-inspection and 10 are CLOSED.

Thank you to all homeowners who have been very responsive to the work needing to be completed. Courtesy letters are sent as a reminder only to Homeowners of work needing to be addressed. The covenants committee is established to keep up the standards of l'On.

Homeowners are not to blow their own leaves into the street but to bag them for the Town of Mount Pleasant to pick-up. Please remind your landscapers as well to haul away leaves as we have noticed too many times they are also blowing debris and leaves into the streets. The Town has recently sent a notice to the HOA regarding this policy and their need to keep drains clear.

Currently Homeowners have been asked to make sure their ROW Strips in between the street and sidewalk in-front and along side their homes are nicely manicured. These can fall to the wayside during the year.

If the town misses your debris pickup, please call to reschedule as soon as you can so it does not continue to remain on the street. Trash and debris should not be out more than 24 hours before pickup.

If you notice cars are parked in front of your house for an extended period of time, please call Mount Pleasant Police to inquire about having them removed.

The next Covenants meeting will be November 19th.

IDC Actions

Month: September 2025

Application Type	# Reviewed (M/YTD)	#Approved w/o Conditions (M/YTD)	#Approved w/ Conditions (M/YTD)	# Denied (M/YTD)
Maintenance & Repairs (Apprvd. By NDC)	4/30	4/30	-	-
Minor Exterior Changes	5/21	2/18	2/5	1/4
Minor Landscape Changes	1/20	0/1	1/13	0/6
Major Landscape Changes	0/12	0/3	0/6	0/3
Structural Changes <625 sf	1/19	0/6	0/8	1/5
Structural Changes >625 sf	1/2	-	1/2	-
New Home Construction Preliminary Review	0/1	-	0/1	-
New Home Construction Final Review	-	-	-	-

Application Type	# of Individual Properties Reviewed YTD	# Eventually Approved	# Denied
Minor Exterior Changes	18	17	1
Minor Landscape Changes	18	15	3
**Major Landscape Changes	8	7	1
**Structural Changes < 625 sf	17	15	2
**Structural Changes > 625 sf	2	2	-
**New Home Construction Preliminary Review	1	1	-
**New Home Construction Final Review	-	-	-
Total Individual Properties:	64	57	7

** These submissions typically require multiple reviews before approval.

IDC Decision Appeals to BOA
October 20, 2025

# Decisions Appealed (M/YTD)	# IDC Decisions Upheld (M/YTD)	# IDC Decisions Partially Upheld (M/YTD)	#IDC Decisions Overturned (M/YTD)
0/1	0/0	0/1	0/0

Communications Report

The 2026 Directory was sent to Allegra Marketing & Print earlier this month. We anticipate having the directories by the end of October.

Linda Hanson is organizing the yard sale and has asked those who plan to participate to make signs and hang balloons to guide shoppers to their homes. She also contacted the Town of Mount Pleasant and asked for non-emergency police officers to help if needed with traffic flow on N Shelmore, etc.

Antonia and the Trust have been hard at work on some special events in I'On. On October 26th from 4pm-6pm is Halloween in the Hood. An email blast has been sent to the community with more information regarding this event.

The Trust is also working hard on the Giving Lights Fundraiser, which will be on Sunday, December 7. that will support Friends of Morning Light, a special initiative of Star Gospel Mission. This year's campaign will raise funds and awareness for Friends of Morning Light, a special initiative of Star Gospel Mission, a transitional housing program created to support women and children in Charleston County who are experiencing homelessness. Donations will directly benefit this vital project, helping vulnerable families rebuild their lives with dignity, safety, and hope. We look forward to another successful year and an email blast will be sent with more information at a date closer to the event.

Elaine continues to investigate the Circle App. Emily informed the committee members that the Assembly office will not be responsible for monitoring posts but will verify owners when they sign up.

Emily and Nina cleaned up and fixed all email addresses in Constant Contact by deleting or editing all the bounced back and undeliverable emails. There were only 24 bounces in October.

Vote to approve Civitas Award recipient as discussed in executive session.