

MARCH 2020 ISSUE 4

CAROLINA PRESERVE

HOA NEWS

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NEW HOA DIGITAL NEWSLETTER IS A HIT!

The HOA Digital Newsletter introduced in December 2019 seems to be a useful and well-read publication with Carolina Preserve residents. Using internet analytics, we can determine the number of newsletters read by residents each month. These analytics show the following;

December Reads	646 Residents
January Reads	1020 Residents
February Reads	1134 Residents

The HOA Board of Directors and our General Manager decided to create this monthly newsletter to share more information and HOA related happenings throughout Carolina Preserve (CP). It allows the HOA Board of Directors, General Manager, Kuester Directors, HOA Committees, and Task Forces to effectively distribute timely updates on what everyone is working on along with timely financial information. This new digital HOA newsletter complements our CP website HOA Board Communication Blog and our monthly HOA meeting minutes. All of this is an attempt to provide timely information to CP residents to keep them informed about their community. These newsletters are also archived on the web site for easy reference by current and future residents.

Thank you to the dozens of residents that have sent in supportive comments and even suggestions for the Newsletter. We are pleased residents find the HOA newsletter worthwhile.



HOA President Comments

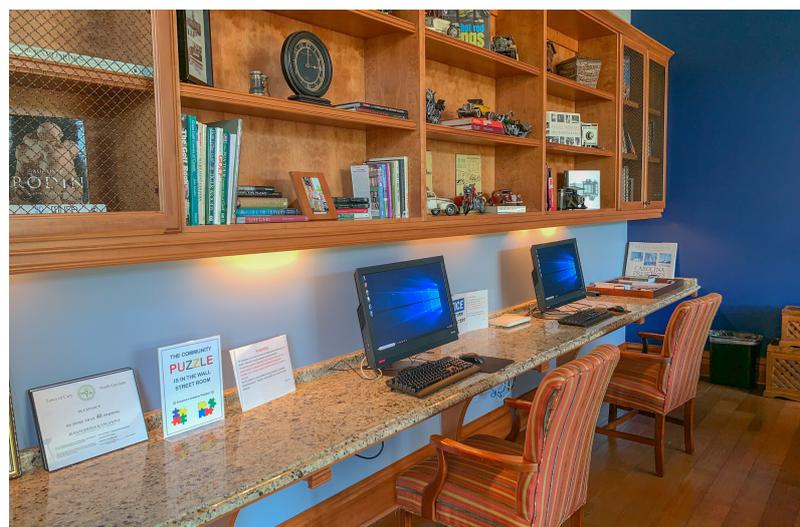
by Tom Crotty

Time for a Community “Report Card”

About three years ago the then Capital Improvement Task Force and the HOA Board President and General Manager organized a special Focus Group with local realtors. Carolina Preserve was starting up our Strategic Planning process at the time and we were looking for ideas and feedback on our community image, curb appeal, reputation and to better understand our competition. The realtors were not shy and provided us an abundance of valuable information that fed directly into our Strategic Planning process. Many of the suggestions the realtors provided to us became Strategic Planning projects and goals. For example:

- Refurbishing the Finnbar, O’Kelly Chapel and Del Web main entrances
- Revitalizing our five pocket parks to provide some Pop!
- Redecorating of Bradford Hall replacing and upgrading fitness equipment, carpeting, furniture, lighting, painting, staining, etc.
- Improving our curb appeal and adding some color to our community
- Start some Go-Green initiatives
- Install Pickleball courts
- Create a new Public side of our web site with fresh photos, videos, etc.
- Enhanced Lifestyle programs (CPU classes, Speakers, events, etc.)
- Implement a robust New Resident Orientation program

Thanks to our many volunteer residents that participated on Committees, Task Forces or groups like Beautification and Adopt-A-Spot plus our Kuester staff we have been successful in addressing these and many more projects and enhancements to Carolina Preserve. In 2019 Carolina Preserve set records with the most homes sold in one year and at all time high prices. (See Chet’s article below for more details.)

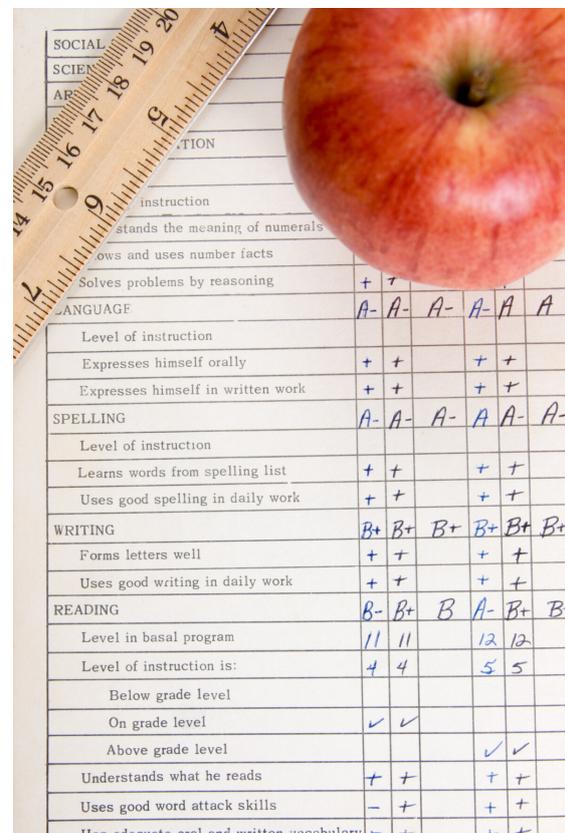
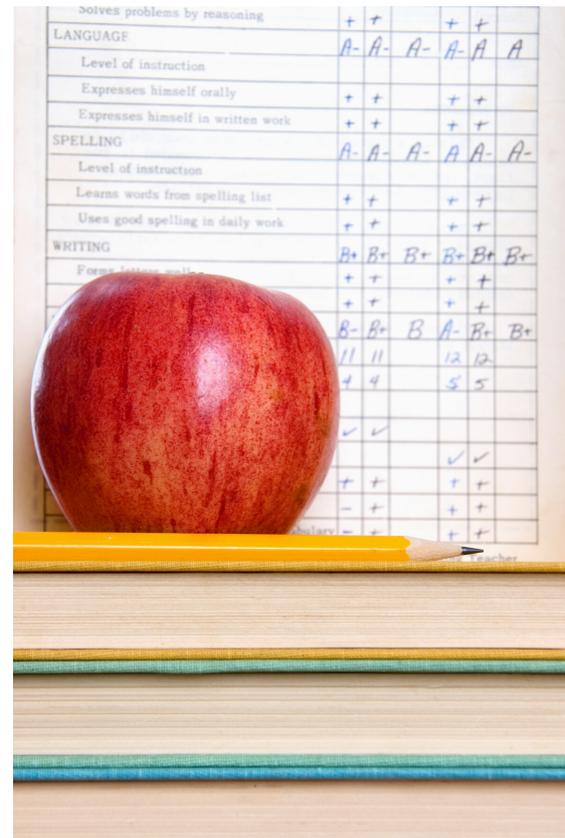


So, how are we doing?

On Monday, February 24 the HOA Board and General Manager held another realtor Focus Group to review our Carolina Preserve progress to date and get current feedback on our improvements, community image, curb appeal, direction and to size up our growing competition.

We opened our discussion with Carolina Preserve's many accomplishments over the past two plus years and plans for 2020. The realtors gave the Community rave reviews for the transformation and improvements throughout Carolina Preserve. They said the curb appeal is much improved and Bradford Hall looks wonderful. They also stated Carolina Preserve has a strong reputation for our financial management and reserves. They like the updated Front Desk packet and the friendliness of the front desk with visitors. However, they pointed out that much of the outside world still cannot see how wonderful Carolina Preserve is because our external web site lacks current information about us. We reviewed our plans for a new web site complete with active videos and current photos and lots of new content and they became very enthusiastic. It was a great and honest exchange of information and ideas. In the end all parties learned new things.

Then we got into the serious discussions about what we can work on and improve, industry trends, mold and need for power washing, hot tubs, grass replacement, Amberly, who are our competitors, among other challenges. Well I can't give it all away here so please plan to attend our Strategic Planning sessions scheduled during March where we can explore what we learned in greater detail and discuss what to do about these challenges.



Carolina Preserve 2020 Strategic Planning - Part II

It's that time of year when the Board and GM hold Focus Groups with residents to gather ideas and suggestions that are factored into updating our Carolina Preserve Strategic Plan. Don't be left out of contributing to setting directions for our Carolina Preserve community.

The Board already has a short list of new requests from residents submitted since May 2019. The Board also will share ideas and feedback from our Realtor Focus group held February 24, 2020.

How Does this Process Work?



Two Focus Groups open to all residents are planned during March. One will be held at night and another during the daytime to accommodate all schedules. Please consider registering for one of these sessions.

- March 17, 2020 (Tuesday) at 6 pm
- March 19, 2020 (Thursday) at 10 am

The Focus Groups are facilitated by Christine Hast and Tom Crotty. The session starts with introductions and then the existing list of ideas / requests received are discussed along with the Realtor ideas and feedback. The residents are asked what they think of the idea and its value to our community. We also might discuss importance of one item vs another. Residents are encouraged to suggest new ideas that are then discussed openly. We try to capture the key points from each idea discussed. The information from all the sessions will be documented. A special HOA Board meeting is scheduled by May to:

- Review all the ideas
- Discuss rough costs and how they fit within our budget over the next 12 - 36 months
- Examine possible legal or licensing implications
- Determine whether any ideas conflict or impact any current CP association policies
- Based on current plans can any ideas be combined within existing projects

The ideas that make it through this process are added to the Carolina Preserve Strategic Plan which will be presented to the community in September 2020.

The HOA Board and General Manager encourage residents to participate in this process as this is how we determine which projects will be funded by the Board over the next 12 - 24 months.

2020 Review of Key HOA Association Documents and Policies

Every two years the HOA Board of Directors (BOD) and the GM are responsible for the review and updating of HOA Association documents and Policies. This is a joint effort that involves the GM, BOD and several of our Board Advisory Committees and Kuester management and staff. Our objective is to update our manuals for needed changes, clarification of policy, additions, etc.

The four documents we will review in 2020 are:

- o Carolina Preserve By-laws
- o HOA Board Operating Procedures
- o Club Operating Manual
- o Facilities Use Manual



A sample of some of the changes we will consider incorporating into these policies are:

- We need to add the Pickleball amenity, rules, new club purpose, etc.
- The kitchen section will be reviewed and rules for recycle updated, etc.
- Add rules that allow for Pocket Parks to be reserved for functions
- We will incorporate the Parking Policy and Estate Sales rules within a new Facilities Use document
- We will standardize Club Charters, adding more information requirements and requiring club officers to have read the Club Operating Manual
- Need to document the rules and procedures for use of the Golf Frisbee and Corn Hole features of the Fun and Fitness Park
- Will examine development of a Fishing Policy
- Add and execute and approve CAI Civility Pledge
- And many more exciting updates

Each document will be reviewed and updated as necessary. This process will take the next six months to complete. The Board will then review the changes for acceptance and vote on approval. Once the updated policy is approved by the BOD it is made available to the public (all residents) for review. Residents are asked to send all comments to the HOA BOD (HOA.Board@cpamberly.net). If there are no comments the approved policy will take effect 30 days after approval. If there are resident comments, then these comments will be addressed by the Board at the next HOA Board meeting and possible policy adjustments made.

2020 Financials at A Glance

Operations (\$000)

	January		Full Year
	Actuals	B/(W) Plan	Plan
Income	\$336	\$2	\$4,027
Uses			
Reserves	\$40	\$0	\$505
Expenses	\$297	\$-28	\$-6
Net	\$-1	\$-26	\$3,522

Reserves (\$000)

	Replacement	Villa	IIF	Painting	Operating Contingency
12/31/19	\$922	\$285	\$88	\$14	\$655
Contributions	\$33	\$3	\$4	\$0	\$0
Interest	\$2	\$0	\$1	\$0	\$0
Expenses	\$16	\$4	\$8	\$0	\$0
1/31/20	\$941	\$284	\$85	\$14	\$655

By Chet Sadosky, HOA Treasurer



Carolina Preserve HOA

New Member Fees

By Chet Sadosky, HOA Treasurer

The HOA receives approximately 5% of its total income from sources other than monthly assessments. The major contributor of this non assessment income is the "New Member Fee" as defined in section 9.12 of our Covenants:

"The Association and Declarant shall collect a "New Member Fee" upon each transfer of title to a Lot, other than exempt transfers as set forth herein. The New Member Fee shall be charged to the grantor of the property, shall be payable by grantor or grantee as their contract provides to the Association and Declarant at the closing of the transfer of the Lot.

The fee to the Association and to Declarant shall equal 1/3 of one percent (1/3%) of the Gross Selling Price of the Lot, with all improvements, upgrades and premiums included, and shall be due upon the closing of the Sale of the Lot."

The following chart shows that the number and value of 2019 Carolina Preserve home sale fees increased significantly over 2018. Given the number of unknown factors in determining the number and average value of resales in Carolina Preserve, we have taken a conservative position for the 2020 Budget.

New Member Fees				
		2018 Actuals	2019 Actuals	2020 Plan
Number of sales		72	80	70
Average Fee		\$1,126	\$1,305	\$1,300
Total (\$000)		\$90	\$104	\$91

What is with all the dead trees in the Community?

By Christine Hast, General Manager



As everyone is aware and can see, the trees all over our community common areas and streetscapes are dying at an alarming rate. It is happening in many parts of North Carolina and other southern states.

First, a little history: During development of our community, the developer and builder had to follow the Town of Cary's Development and Design Standards for all Common areas, buffer area streetscapes and streetscapes. **(This does not include owners' lots or the protected tree buffer areas - that's a whole different story)** Carolina Preserve is over 400 acres. In researching their design guidelines and meeting with the Town of Cary, the requirements for "developed areas" are as follows: for every 100 linear feet, 5 trees are required to be planted and equally spaced apart. In addition, within that 100 feet, in between the trees, shrubs and bushes must be planted every 3 to 5 feet in a staggered zigzag pattern.

I did some figuring - and came up with the best guesstimate. There are 68,640 linear feet of Streetscapes and developed street buffer areas within Carolina Preserve. The Perimeter which runs from the corner of Pittard Sears, down O'Kelly Chapel to Yates Store, down Yates store all the way to the entrance of the walking trail is 139,400 linear feet. Same development planting required.

So, with that information, it was calculated that the developer planted 41,608 trees and 208,040 shrubs and bushes or a heck of a lot of trees and shrubs! (+/- a few.) Picture it - the enormity of the battle as you drive slowly through the community and on the outskirts of the community.

Early in 2018 we noticed the first deterioration, especially affected were Loblolly Pines, Arborvitae and Leyland Cypress. An Arborist was called into diagnose the problems. It was a plethora of tree ailments beginning with root rot due to the wet winters and springs, pine beetles, ambrosia beetles, spider mites, canker, fungus and scale, just to name a few. Action was taken immediately to treat all trees hoping to save them. Some trees responded and some did not. In 2019 the diseases and bugs were winning the war.

Since then we came up with a game plan. Del Webb and the surrounding perimeter mentioned above are considered "Streetscapes" and are top priority for the Town of Cary. These areas will be attended to first. So far, we have removed 63 dead trees and shrubs and have replaced them with 44. We are replacing with trees and shrubs that are fast growing, more robust and less susceptible to disease from the evergreen family. Some areas, after many visits pointing out the over planting and crowding of an area and much begging, the Town of Cary has agreed that no trees needed to be replaced. After the perimeter and Del Webb, we will start to branch out to other common areas. This will take time and will be a great cost to the HOA to remove and replant. We do budget yearly for tree and shrub maintenance, but trees are dying at such an alarming rate, there will be over-runs in the budget in that maintenance category.

Your patience and understanding are needed as we battle through this. While we can remove a tree anytime, planting time is best in late fall until spring and if all dead trees were remove at the same time, there would be gaping holes until planting time which would expose the many back yards and homes that border Del Webb, O'Kelly Chapel and Yates Store.

It is also recommended for owners to inspect trees and shrubs on your lots for any issues you see and call in an arborist for recommendations.

Let's Get Social

By Deborah Badger, Lifestyle Director



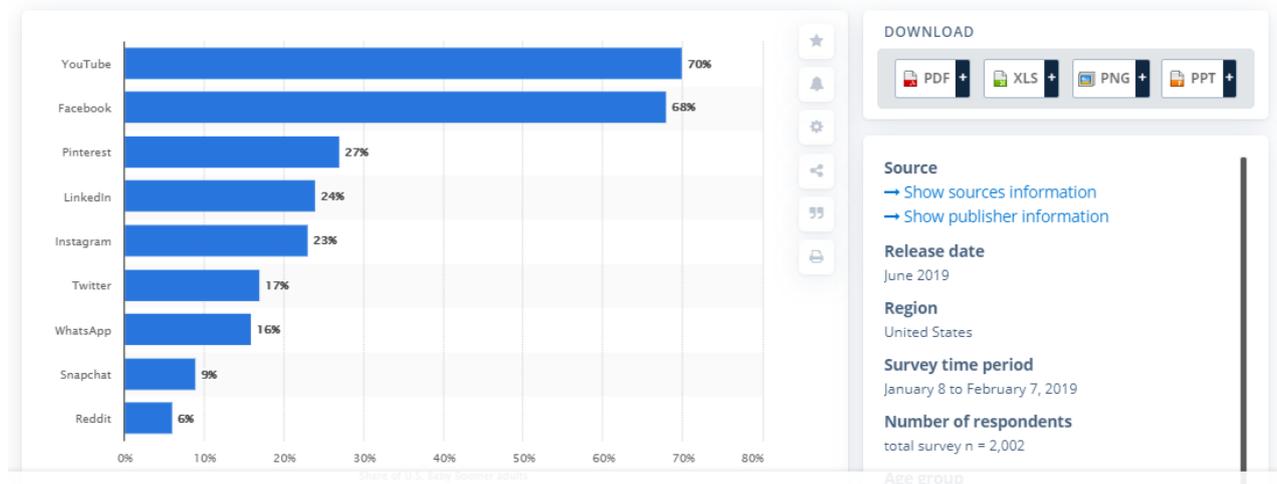
Your Board has spent a great deal of time working on a strategic plan, keeping the community focused forward, planning for the future. While the future is unknown, it is clear that baby boomers are retiring at a huge rate. Currently 10,000 Americans turn 65 **each day** and that will increase to 12,000 in the next few years. As this generation is planning what they want their retirement years to look like, much of their research is done online, especially those who are planning to move out of state.

If you searched 55+ communities in the Triangle online, you would see the newer communities with large marketing budgets, fancy new home models, a professional website, beautiful stock photography, and professionally managed social media accounts – they look amazing! At the recent realtor focus group, they stressed that additional homes are continuing to come online quickly, the competition is growing to meet demand.

So how do we reach those prospective buyers and let them know what a fantastic place Carolina Preserve is without a huge marketing team? According to a 2018 Forbes article, “ 82% of boomers who use the internet have at least one social media account, and they have an average of 4.6 social media accounts, with Facebook and LinkedIn as the leading platforms.”

Here is a view of US baby boomers most used social networks from Statista:

Percentage of U.S. Baby Boomers who use selected social networks as of February 2019



Our plan is to be more visible online using those social media platforms that boomers prefer: YouTube, Facebook, and LinkedIn for starters. We want you to join us, follow along on whatever channel you are already using. At the same time, we hope you understand that communication on social media is targeted to those who do not already know about us. It would never become a substitute for current communication within the community like email blasts, internal website information, digital newsletters, posters, scroll board, etc.

So, what will be included on our social channels? Content demonstrating Carolina Preserve is a vibrant active community - like our new marketing videos. The videos can be seen on social first and later will be embedded in our new external website which is currently under construction.

Ready for the future? Let's get social:



Carolina Preserve Community Emergency Response Team

By Margaret Horst

Severe weather events such as tornadoes can happen any time of the year, but this month marks the start of “tornado season,” the time from March through June when tornadoes are historically more likely to be seen in North Carolina. Just as you should review your family’s preparations for the possibility of a tornado or other severe weather, your community is also looking at ways that we can take care of ourselves until outside help can arrive after a significant, widespread disaster that strains emergency responders.

The Carolina Preserve Community Emergency Response Team (CP CERT) is composed of over one hundred of your neighbors who have trained and are prepared to help you and everyone in Carolina Preserve until professional responders can arrive after an emergency or natural disaster. The goals of the CP CERT program are to:

- Ensure individual, family and community safety is achieved through specialized training under the direction of the Cary Fire Department,
- Establish a neighborhood preparedness plan which is designed to enhance the abilities of individuals and neighborhoods to reduce their emergency needs, and
- Manage existing resources until professional assistance becomes available.





In support of these goals, CP CERT has assembled stores of supplies and materials (purchased by the HOA) that we would need to set up first aid stations (lights, generators, blankets, cots, bandages, splints, etc.) and to support light search and rescue operations (tools to shut off gas and electricity, hammers, pliers, knives, pry bars, ladders, etc.) These supplies are stored in Bradford Hall and in several other locations around the community so they can be available close to where they are needed. CP CERT does NOT maintain emergency stores of food and water. Instead, we encourage and expect all residents to have a 72-hour supply of essentials like food, water, medicine, etc. for their household.

How can you help?

Everyone in Carolina Preserve should be prepared to take care of themselves and their family in case of an emergency. CP CERT can provide guidance on what you need to have in your disaster kit. Check our club page on the CP website for free downloads of useful information. If you want to do more, you can sign up for the free training class sponsored by Cary CERT and the Cary Fire Department. The class is typically held three or four times a year, usually on a weekend (Friday evening, all day Saturday and Sunday), and it provides useful knowledge on what to do after a natural disaster. It is not a commitment to join CP CERT, but it is a requirement for our members.

We are always looking for more CP residents to be trained to know what to do in case of an emergency. If you can do more, we welcome your participation in CP CERT. We are also looking for additional volunteers to store these community emergency supplies in your home/garage. If you have room to store a couple of boxes of supplies, please let us know.

For more information on the Cary Fire Department emergency preparedness class or on joining CP CERT, please contact us at cpcert@yahoo.com for more information.

Lifestyle Fitness Survey: March 8 - 22, 2020

By Carol Randall - Chair, LAC

Calling ALL residents and fitness buffs to let us know what you think of the exercise equipment and fitness activities at Carolina Preserve. As part of the HOA Strategic Plan to enhance the active lifestyle of our CP residents, the biennial Fitness Survey will be coming out in a few days. (The next opportunity to provide formal input won't be until 2022, since we will be alternating the release of the Fitness and Lifestyle surveys every two years.)

The LAC Survey Sub-Team and Christine Arndt, CP's new Wellness Director, have developed the 2020 Fitness Survey. The results will provide timely insights about fitness classes and equipment, just as we kick off the strategic planning budget cycle. This survey helps the Lifestyle Department better understand what you want and need from your fitness activities and to plan budget priorities.

The survey acknowledges an increasing number of new residents, residents who continue to work, and CP's goals to maintain a vibrant community.

A total of 458 residents responded to the most recent fitness survey in 2019, a 25% increase in the response rate from two years before! Let's beat that number in 2020!

Keep an eye out for the Lifestyle Fitness Survey. Residents can access the survey from March 8th through March 22nd. Thank you in advance for your input in helping maintain CP as a vibrant Community of Excellence.



CGAC- Club and Group Advisory Committee

By Joel Glassman- CGAC Secretary

Who are we? – We are an advisory committee that serves as a liaison between the HOA Board and Lifestyle and the clubs and groups. We support the Strategic Plan. We take much of our direction from the Board but will also discuss items that concern and affect many clubs and groups in order to improve resident experiences and enjoyment.

What have we accomplished?

- 1- Developed a training package to assist club leaders and event coordinators with how to use the audio-visual items associated with their events.
- 2- Reviewed both the Club Operating Manual and Facilities Use Policy and made recommendations for changes
- 3- Worked with Lifestyle to help to make the scheduling and charter update process as smooth as possible and discussed issues with multiple calendars.
- 4- Conducted a survey of club and group needs.
- 5- Developed an insufficient funds/bad check policy for clubs to use.
- 6- Began to look at a policy for the use of outdoor facilities.
- 7- Published an article in CP Connections on how clubs can recruit volunteers
- 8- Met with Lifestyle to discuss club and group kitchen needs

What are goals for 2020?

- 1- Fill our vacancies with new members.
- 2- Continue to provide training on using the AV equipment in Bradford Hall. Sessions were already held in February.
- 3- Work with the IT committee to update the “help” tab menu links on the website and later to provide training on website usage for club leaders.
- 4- Examine the results of the survey to determine what is needed by the clubs.
- 5- Continue to work on the policy for the use of outdoor facilities in light of the new pickleball courts that are planned.
- 6- Continue to work with Lifestyle to assist in the scheduling process for 2021.
- 7- Continue to examine the Club Operating Manual and make any recommendations for changes to the HOA

We welcome any suggestions and look forward to working with the clubs and groups, the Lifestyle Department and the HOA Board.

2020 Committees

Architectural Review Committee

Steve Botha | John Bongino | Elizabeth Diton | David Hall |
Csaba Dosa | Claire Hammitt | Barbara Lewandowski |
Ken Merten | MaryJane Slusser

Club & Group Advisory Committee

Karen Baker | Larry Brown | Carol Davis | Joel Glassman |
Linda Laurich | Paulette Shekell | Ruth Poley | Tim Sisley

Finance Committee

Melva Brown | Kathy Dunn | Richard Craft | Eugene Harshbarger |
Bill Lazcano | Alan Rosenberg | Carol Stone | Paul Wolf

Information Technology Committee

Jean Curtin | Dennis Curtin | Jeff Diton | Mel Kosmin |
Amy Levine | John J Stolzenhaler | Robert Willenberg

Lifestyle Advisory Committee

David Baker | Dennis Curtin | Glenn Haines | Jill Poston |
Judy Rampolla | Carol Randall | Sandra Rusk | Lynnette Womble

2020 Board

Tom Crotty
President

Burt Katz
Vice President

Margaret Horst
Secretary

Chet Sadosky
Treasurer

Robert Griffith
Member at Large

Carole Katz
Member at Large

John Siciliano
Member at Large

Mark Your Calendar

Quarterly Community
Meeting
Mar 9 | 6:30pm

HOA Board
Open Working Meeting
Mar 17 | 10:15am

Strategic Plan Focus Group
Mar 17 | 6pm

Strategic Plan Focus Group
Mar 19 | 10am

HOA Board
Open Working Meeting
Apr 21 | 10:15am