

DECEMBER 2019 ISSUE 1

CAROLINA PRESERVE

HOA NEWS

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WELCOME CAROLINA PRESERVE RESIDENTS TO A NEW HOA FOCUSED NEWSLETTER

The HOA Board of Directors and our General Manager have decided to create a new communication vehicle to effectively share information and happenings throughout Carolina Preserve (CP). This new electronic HOA Newsletter compliments our CP website HOA Board Communication Blog and our monthly HOA meeting minutes. The Board and GM hope to cover more topics and greater details in this new newsletter. We will attempt to make this a monthly newsletter, but we are all retired and have travel plans plus other duties that place a demand on our time. Therefore, a month might be skipped every now and then. The Newsletter will be stored on the CP website for easy reference.

The electronic newsletter will contain the following types of content;

- o Information from the HOA Board on new announcements, items under consideration,, finance updates and legal matters.
- o General Manager updates
- o Information from Board appointed committees
- o Information from Task Forces new and existing
- o HOA Industry trends and directions
- o Town of Cary impacts on Carolina Preserve
- o Amberly Updates
- o Green Initiative updates:
 - Beautification & Adopt A Spot Groups
- o Other Special topics as defined

HOA President Comments

by Tom Crotty

2019 was a milestone year for our Carolina Preserve HOA. Our Strategic Planning initiatives and progress earned Carolina Preserve the "2019 CAI Community of Excellence Award" and the "CAI Management Excellence" award for Christine Hast. The efforts of our Beautification group brought spectacular and much needed color to Carolina Preserve. We are financially sound, and our reserves are fully funded. Our investments have done well and our income from home sales continues strong. Our Lifestyle Department consistently provides an expanded array of events such as CPU classes, health related seminars & fitness classes, Wind Down Fridays, community events such as the community picnic, etc.

The Board Appointed Committees have been very active with bringing change to grass types for shady areas and rules for solar energy, updates to policies, modified New Resident Orientation program, Home and Garden Show, IT training classes occur routinely and much more.

In 2019 the HOA Board held two Town Hall Type meeting on "Roof Replacement for Villas" and on "New Grass Options for Shady Areas". These were very well attended and established a model for future Town Hall Type sessions with Carolina Preserve residents.

Our Task Forces again have done an exceptional job. With Carolina Preserve home sales staying strong (2017-84, 2018-75 and 2019-YTD-58) the New Resident Orientation group has welcomed over 250 new residents into Carolina Preserve.

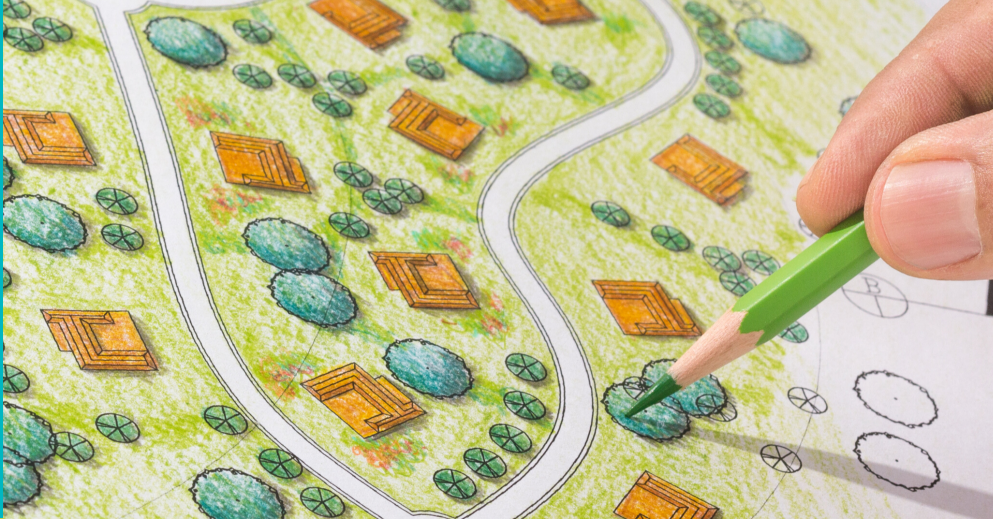
The Bradford Hall Interior Decorating Task Force is putting the finishing touches on a complete refurbishment of the lower level of BH.

The Pocket Park Task Force has formulated a strategy to redo all five Carolina Preserve Pocket Parks. The heavy lifting required for each park was done in 2019 and by Spring 2020 The Allforth "Serenity Park" and the Finnbar "Fun and Fitness Park" will be completed. The Pickleball Task Force has been in a wait mode most of 2019 but in late November 2019 Town of Cary gave approval and a green light to our plans. Finally, the Election Task Force conducted another expertly run HOA elections with participation by 56.25% of all CP households.

The Board and General Manager thank each resident that volunteered to these efforts and contributed to achieving such a remarkable year for Carolina Preserve. Please consider volunteering in 2020.



Landscaper Definitions



LET'S GET ON THE SAME PAGE WHEN WE REFER TO OUR CAROLINA PRESERVE LANDSCAPERS

By HOA Board & General Manager

The definition of a term has many meanings and therefore many assumptions and expectations. The term Doctor can mean medical doctor, college professor, research specialist, someone with a PhD, etc. Carolina Preserve searched a Landscaper for the next 2-3 years.

The language of landscape design and maintenance can be confusing so let's discuss the term landscaper. There are many types of Landscape Companies.

The primary four types are; Landscape Architect, Landscape Contractor, Landscape Designer and Landscaper. What do they each do? What is the difference? Let's briefly discuss each and identify the type Carolina Preserve is looking to hire to maintain our common areas and lawns and to help the owners and HOA Board manage expectations and what services will be provided by a landscaper.

Landscape Architect

A landscape architect is someone who has a college degree in landscape architecture and is registered or licensed by your state. Landscape architects have training in engineering, architecture, land grading, drainage, design, etc. They may or may not have extensive knowledge about plants. Landscape Architects design attractive and functional public parks, gardens, playgrounds, residential areas, college campuses, and public spaces. They also plan the locations of buildings, roads, walkways, flowers, shrubs, and trees within these environments. Most of their work is done in their office and sometime visiting the site with various contractors reviewing plans to ensure design implementation. Clear Vision Designs in Morrisville is a good example of a Landscape Architect.

Landscape Contractors

Key employees are licensed or registered by the state. They typically have extensive experience installing new landscapes, modifying existing landscapes and maintaining landscapes. They may or may not have a college degree in landscaping. They can create design drawings, but they may not have training or education in landscape Architecture. Sometimes they work with pre-existing landscape drawings created by other Landscape professionals. Landscape contractors are hired to do the heavy lifting, use of earth moving machinery, installing small retaining or decorative seating walls, grading, stone structures and brickwork. They get the job done. Landscape contractors can work for both commercial and residential clients.

Landscape Designers

Although similar to Landscape Architects, Landscape designers don't need to be licensed or registered by most states and will not have the architectural background. They are hired to create and design drawings for your home garden and flower beds. Landscape designers usually have a landscape or horticultural college degree or certificate. They often have the reputation of being creative and knowing a lot about plants, trees, local climate, fertilizers, etc. They often partner or own nurseries or retail business that sell all types of plants (perennial and seasonal), garden equipment and full residential design and planning services. They usually deal in both softscape and hardscape. They might or might not employ an arborist. Local examples are Garden Supply and For Garden Sake.

Landscaper

A Landscaper is someone who is not necessarily degreed, licensed or state registered. Their horticultural knowledge is limited. They focus on maintenance of the landscape. They perform basis landscape services such as mowing, leaf removal, pruning and seasonal fertilizing. They are often referred to as mow and go enterprises. Additional services sometime offered are mulching, pine straw, laying new sod, clearing brush, etc. Local examples are YardNique, BLAND Landscaping, Hansley's Landscape, etc.

What was Carolina Preserve Looking to Hire?

The Carolina Preserve HOA Board and GM hired a Landscaper Company to maintain cutting of the grass, pruning of shrubs, basic, weed control management and installation of mulch of home properties, common areas and of course the Bradford Hall grounds.



Carolina Preserve welcomes two new landscapers to service Carolina Preserve HOA!

by Christine Hast

As you know, Carolina Preserve has now taken over the perimeter landscaping from the Amberly Master Association. The Perimeter area is along O'Kelly Chapel, down Yates Store Road and the entrances at O'Kelly Chapel, Finnbar, Weycroft and Del Webb.

The Board has entered into a two year contract agreement with Hansley's Landscaping a family owned company, <http://www.hansleysinc.com/> The owner is Mike Ferrell, who is a North Carolina native. Having a lifelong interest in landscaping and design, after 20 years as a NC State Trooper, Mike purchased Hansley's Landscaping Company and along with his son Alex, has owned and operated Hansley's for the past 15 years. Some of Hansley's customers include the grounds at NC State university, Corporate Office complexes and Individual owners' homes throughout the area. I have had the pleasure of working with Mike on different projects in the Carolina Preserve community for the past two years.

Additionally, Bland Landscaping has been awarded a 3-year contract to maintain 1360 home lots, common areas and the grounds at Bradford Hall. <https://blandlandscaping.com/>

Since 1976, Bland Landscape has been an innovative leader in using sound horticultural practices and started servicing HOA communities. Throughout the years, they have grown and service HOA communities as well as Corporate office campuses throughout North Carolina, Charlotte and Wilmington. In the past as a HOA community portfolio manager, I also had the pleasure of working with Bland Landscaping.

Please watch for community email blasts as we prepare for our 2020 ventures regarding landscape services. Bland Landscape will honor an opt-out list of services and a work order submission system.

Please welcome both landscapers, Hansley's Landscaping and Bland Landscaping to the Carolina Preserve Community!

"Please
welcome both
landscapers,
Hansley's and
Bland."

GENERAL MANAGER

Our Carolina Preserve Go-Green Groups have been busy!

MUMS THE WORD

Beautification Group projects

Planted 130 Mums around Bradford Hall in October and then relocated them November 16 to other locations around Carolina Preserve. This allowed for winter plants to be planted at Bradford Hall.

A tree was donated and planted by Burt Katz in Fun and Fitness park (on Finnbar) on November 3rd.

During the week of October 18th, a 25-gallon Tamukeyama Dwarf Japanese Maple was planted in Serenity Park (on Allforth.) The tree is reddish purple in the spring and dark crimson in the fall - will take full sun. Its maturity size is 10 feet tall by 10 feet wide. Special thanks to Ray Shirtz for digging the hole and Burt for planting of the tree.

On November 18th additional landscape enhancements were made to the front entrance of Serenity Park on Allforth. This entailed transplanting of 6-8 good sized spherical holly's and relocation of several perennials. Also 20-30, 3-5-gallon evergreens to finish off the beds.

A Bulb Blitz planting event is planned for December 7th starting at 10 am (rain or shine). Plan to plant 500 tulips and 1500 daffodils. Hot and cold refreshments and pastries will be available for the volunteers. All volunteers are welcome.



Adopt A Spot Group

The Adopt-A-Spot group completed their quarterly cleanup on November 15, 2019. There was a good turnout of volunteer residents who walked the Carolina Preserve perimeter picking up litter. Hot and cold refreshment were served to the volunteers.

We thank everyone who participated.

They collected;

6 bags of trash

2 bags of recycling



Pickleball is coming to CP, so what is Pickleball?

by HOA Board

Pickleball is a paddle sport played with a whiffle ball on a badminton-sized court and a tennis-style net. A non-volley zone (or kitchen) prevents volleys close to the net, and the serving team cannot volley the return of serve. These unique rules favor players with less mobility and allow senior players to compete successfully with younger competitors.

Pickleball is enjoyed by people of all ages and athletic abilities thanks to its ease of play and straightforward rules. The sport is inexpensive, social and healthy, and has been widely accepted in school gyms, fire stations, community centers, local parks, athletic clubs and thousands of backyard sports courts. In some ways it's a combination of tennis and badminton, and along with sports such as table tennis and racquetball, pickleball has exploded in popularity. Thousands of pickleball courts have been built in recent years, especially in senior communities.

These areas have benefited from increased camaraderie amid peers since both doubles and singles can be played. Doubles involve longer rallies, lower physical demands and more opportunities for court banter. Though easy to learn, pickleball provides endless opportunity for individual improvement and learning subtle techniques. Many players who initially dismiss the sport as amateurish or simplistic now find it addicting. Like golf, many fans play several hours a day either indoors or outdoors.

Pickleball is an inclusive, accessible, non-elitist sport that transcends social and economic barriers. Playing styles vary widely, even at the highest levels. Many top players have no past racquet or paddle sport experience and have limited athletic abilities. Pickleball is easy to begin but difficult to master. Grab a paddle and give it a try!

The Carolina Preserve Strategic Planning process discovered this information in 2018 based on research of HOA community amenities and from focus groups conducted with local realtors. It was determined that for CP to compete for the younger Adult Active 55+ market and to grow the values of our homes that investment in Pickleball courts would be most advantageous. Town of Cary approvals have allowed CP to move forward with our plans to use space next to the putting green to build two courts.

*"the fastest growing sport
you've never heard of"*
NBC News



Replacement Reserve Studies: An Explanation

By David Weiss, Assistant Treasurer

What is a replacement reserve study? What does it cover and how is it used?

Our Association owns a great many assets including the clubhouse and all its associated facilities, all of its furnishings and equipment, and all of the community infrastructure such as ponds, retaining walls, tennis courts, etc. As a member of the Association, you share in this ownership. These assets, worth over \$6 million will, over time, wear out and need to be replaced or have major repairs. Some will need to be replaced in just a few years, and some will serve us well for many decades. In any case, how do we ensure that the Association will have sufficient funds set aside to cover these costs when they occur?

Associations typically perform a replacement reserve study for this purpose at least every five years. Replacement reserve studies are generally performed by a professional engineering firm that specializes in such studies. Our most recent study was completed in August 2016 by the firm of MillerDodson and is available on the Association website in the Finance Committee – Public folder. A new professional Reserve Study will be conducted in 2020.

The steps taken in performing the study are:

1. Develop a complete inventory of all common elements based on plans, drawings, and an on-site visit.
2. During the on-site visit, visually inspect and determine the current condition of all elements of the inventory.
3. Based on industry standards and engineering experience, determine the “Normal Useful Life” and “Remaining Useful Life” of each element.
4. Develop an estimate of the replacement cost of each element.

5. Summarize the costs of items projected to be replaced in each succeeding year.

6. Provide for a margin of error by developing a “Minimum Recommended Balance” at the end of each year.

7. Based on the current level of replacement reserve funding, calculate the ongoing level of annual contributions to the reserves from the Association members’ monthly assessments.

The study document, which is posted on the Association website, lists an inventory of items, each with its associated number of units (e.g., sq. ft.) normal useful life, remaining useful life, and estimated replacement costs. It shows the projected replacement costs, by inventory item, in each of the next 40 years. Finally, it shows the amount calculated as the annual contribution to the reserves from the operating account to cover the anticipated replacement expenses.

The Finance Committee and the Board start with the reserve contribution amount in the most recent Interim Reserve Study (an annual in-house update of the original study) as the starting point for budgeting the reserve contribution for the coming year. For 2020, the operating budget calls for approximately \$25 (or 10%) of your \$231 monthly assessment to be contributed to the replacement reserve fund.

Following this disciplined process of reserving these funds for future replacement expenses helps to insure that you will not face a large special assessment when a big-ticket item, such as the Clubhouse roof, needs to be replaced. It is also important for prospective buyers to know that the replacement reserves are adequately funded.

Financials at A Glance

Operations (\$000)

	October Year To Date	
	Actuals	B/(W) Plan
Income	\$3,218	\$9
Uses		
Reserves	\$461	\$4
Expenses	\$2,781	-\$20
Net	-\$24	-\$7

Reserves (\$000)

	Replacement	Villa	IIF	Painting	Operating Contingency
12/31/18	\$874	\$272	\$29	\$5	\$633
Contributions	\$319	\$28	\$89	\$25	\$0
Interest	\$17	\$4	\$1	\$0	\$0
Expenses	\$242	\$19	\$3	\$16	\$0
10/31/19	\$968	\$285	\$116	\$14	\$633

By Chet Sadosky, Treasurer





CP University-A Recap

by David Baker, CP
University Coordinator,
Lifestyle Advisory Committee

Activity is a frequently used word at Carolina Preserve. An active lifestyle means to most of us days punctuated with a yoga class, water aerobics, tennis, or a game of hand and foot. Activity may also involve the mind. An active mind goes hand-in-hand with a healthy body. Carolina Preserve University (CPU) is principally concerned with the second type of activity by presenting a variety of courses which appeal to a wide range of interests. Courses are offered throughout the year in spring, summer, and fall "terms". There are day and evening offerings which vary in length from 2 to 8 weeks. All at a very affordable price.

"“Anyone who stops learning is old, whether at twenty or eighty. Anyone who keeps learning stays young.”— Henry Ford

In 2019 the CPU catalog featured a two week course exploring the opera Carmen, taught by North Carolina Opera executive director, Eric Mitchko. During the same spring term CP resident and retired Foreign Service officer, Mike Bennett, led a Foreign Policy Association developed course focused upon international policy issues and titled Great Decisions. In the spring and fall the ever-popular wine tasting courses, taught by sommelier Thomas Thorne, were offered. In the spring the group explored wines of the Southern Hemisphere; in the fall they learned about four varietals in a course titled The Story of the Grape. During the early summer months residents were offered the opportunity to explore bird biology and conservation in a three week course taught by NC Audubon conservation director, Curtis Smalling. The calendar year was rounded out with a five week course on The Legacy of Ancient Greece taught by retired UNC professor Jim McCoy. All courses were fully subscribed and uniformly highly rated on the CPU evaluation questionnaire.

Next year will bring old favorites such as wine exploration, Great Decisions and opera as well as new courses in North Carolina history, how the brain works, and baseball. Check out the schedule on the CP University Class Offerings message board. If you have ideas for course and instructors or would like to volunteer as a class assistant or member of the CPU Subcommittee under the auspices of the Lifestyle Advisory Committee go to CPUUniversity@cpamberly.net.

New Resident Orientation Workshops – A Recap

by Lynnette Womble, NRO Coordinator

The New Resident Orientation Workshop program grew out of a 2018 Task Force that was spearheaded by HOA Board Member Carole Katz. Trial sessions were held throughout 2018 and the program became an ongoing effort in 2019. This is a program by residents for residents, reinforcing CP as a volunteer-centric community.

Four two-hour workshops were held during 2019. New residents were invited to sign up for a workshop when they applied for their member Identification Card at Bradford Hall. Email blasts for each session were also sent to the entire community. Over one hundred residents attended the workshops this year.

Sessions begin with each attendee introducing him/herself by name, and letting others know where they moved from and what street they now live on. Common backgrounds and new neighbors are immediately discovered.

Participants are given a booklet to follow along with the broad range of material that is covered. Attendees are introduced to life and regulations in an HOA community, which many have not previously experienced. General Manager Christine Hast introduces the concept of a management company and introduces the Kuester staff.

An introduction of Bradford Hall covers the use of Activity Cards, guest passes, and optional name tags. A great deal of time is spent demonstrating use of the Carolina Preserve (CP) website. Residents learn how to check their own profile and how use the community calendar.

Message Boards are covered, with special attention called to those of “CP University Offerings”, and “Can You Recommend?” which is particularly useful to new residents in finding area services. The Resident Directory is another valuable tool. Lifestyle information includes how to sign up for Lifestyle events on line, group wellness classes, indoor and outdoor pool regulations at CP, and the Amberly pool. The booklet lists the 130+ clubs and groups available at CP, and the ease of joining/unjoining them on line is demonstrated. “Neighborhood Watch,” “CP Cares,” and “Thriving in Place” are featured, and CERT’s Vial of Life packets are provided. Under the heading of Governance, the HOA Board members are introduced, along with the concept of the CP Strategic Plan, and the role of Committees and Task Forces. Particular emphasis is given to the Architectural Review Committee (ARC), to ensure that newcomers understand the importance of being familiar with ARC guidelines and procedures if they wish to make changes to the exterior of their home or property. Landscaping services are also reviewed. Participants are urged to further explore the website on their own, sign up for clubs and groups, and given the message, “You can’t break it!”

Beyond CP itself, coverage is given to services provided by the Town of Cary, the location of local health care facilities, transportation, shopping centers, attractions (arts and sports venues, parks, museums, etc.) and continuing education opportunities.

Attendees leave the workshop with eyes glazed over and heads spinning from all of the information that was covered. However, they have their booklet for future reference, and can sign up for website classes offered by the Information Technology Committee. Evaluations of this program have been very positive, an annual update of the handout packets is in progress, and the quarterly sessions are already scheduled for 2020.

You Can Make it Happen!

*by Carol Randall (Chair),
Future Volunteers Sub-Team,
Lifestyle Advisory Committee*

On Monday, November 4th many CP residents found out what it takes as a Volunteer to contribute to furthering the active lifestyle of Carolina Preserve by attending the You Can Make It Happen Future Volunteers Reception. The event was hosted by the HOA Board and orchestrated by a subcommittee of the LAC: Carol Randall (Chair), Judy Rampolla, Glenn Hains, and Carole Katz – HOA Lifestyle Board liaison.

The Reception, a first-time event, resulted in over 40 residents completing Volunteer Forms and an estimated 100 or so attendees learning and sharing what Committees and Task Forces are all about. Representatives from all HOA Board Committees donated their time and experience to describe what it's like being a Volunteer member: Architectural Review Committee, Clubs and Groups Advisory Committee, Finance Committee, Information Technology Committee, and the Lifestyle Advisory Committee, (including New Resident Orientation and CP University), as well as representatives from the current Task Forces: Pickle Ball, Pocket Parks, Interior Design and Elections.

The idea for a Future Volunteers Reception came from a Strategic Plan directive to help residents understand major elements of how our community works and find qualified volunteers for Committees and Task Forces now and in the future as needs arise.

Residents learned that Committees meet at least monthly and members sign on for a period of one year beginning in January. Task Forces emanate from the Strategic Plan and may be called upon to work on a project for a specific period of time – typically a few months. The Election Task Force is an exception, as it convenes every year to develop a slate of potential HOA Board candidates for November elections. Residents enjoyed a variety of wines, cheeses and fruit sponsored by Google Fiber (to minimize event costs), while talking with neighbors and listening to the Committee and Task Force representatives. If you would like to sign up to be a future volunteer, forms can be completed on-line by going to the CP website: click on Governance, go to Committees & Task Forces, then click the Volunteer Form button. All personal information is treated as confidential. The form will be used as Committee and Task Force member needs arise and kept for 2 years, at which time residents will be contacted to determine if they want to continue to be considered for a potential spot on a Committee or Task Force. Of course, we cannot always guarantee a match but value your interests.



Photo credit: Paul Wolf

HOA Communications Survey - A Summary of Results

by Carole Katz, HOA Board Member at Large

In the summer issue of the CP-Connections magazine, supplemented by an on-line option, the HOA Board conducted a survey to understand how we might best reach CP residents and identify items of interest. Thanks to the CP Connections volunteers, including their distribution team, for inserting the paper surveys distributed to all 1360 homes.

This survey was open to all residents. 669 surveys were completed representing about 30% of Carolina Preserve residents. About 70% of these replies were provided via the on-line option. When planning for this new HOA newsletter, the Board was concerned about residents who don't have access to a PC or tablet. Although the CP Connections magazine would be limited from a timeliness perspective, we valued its reach to all CP households.

Our concern proved to be relatively unwarranted. 93% of the respondents have access to a personal computer; more than 85% to a smart phone and about 70% to a tablet. We look forward to communicating timely HOA Board information via this new electronic newsletter.

Some statistics about the respondents and findings:

- Females replied almost 2:1 to males (424 or 63% vs. 245 or 37%)
- More than 75% of respondents represented an age cohort 70 years or older, equally represented by the 70-75, and greater than 75 years of age respondents (254 replies in each).
- More than 55% of the respondents have lived in the community for more than 8 years. Only 12% of the respondents have lived in Carolina Preserve for less than 3 years.
- 80% of those 70 years and older read 50% or more of CP Connections as opposed to 54% of those under the age of 70.

Views the HOA can use (note: multiple replies were encouraged for the following question sets)-

- The top five sources of HOA information for respondents were:
 1. Management and HOA Board emails- 74%
 2. The CP website- Community News section- 49%
 3. Word of mouth -38%
 - 4/5. (Tie) The CP Website- HOA Board news and Website Message Boards- 33%

The top five topics of most interest to respondents were :

1. CP and Amberly News – 67%
2. CP Finances – 63%
3. CP and Town of Cary Relationships and News - 48%
- 4/5. (Tie) The Lifestyle Advisory Committee and the CP Strategic Plan- 43%

Less interest was noted for current task forces, with future task forces rating highest at 13%.

The HOA appreciates your input and looks forward to addressing your interests in future HOA newsletters.

2019 Board

Tom Crotty
President

Burt Katz
Vice President

Margaret Horst
Secretary

Chet Sadosky
Treasurer

Robert Griffith
Member at Large

Carole Katz
Member at Large

David Weiss
Member at Large

Mark Your Calendar

Blooming Bulb Blitz
Dec 7 | 10am

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

Meet the Landscaper
Jan 13 | 7pm

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