

SEPTEMBER 2020 ISSUE 10

CAROLINA PRESERVE

HOA NEWS

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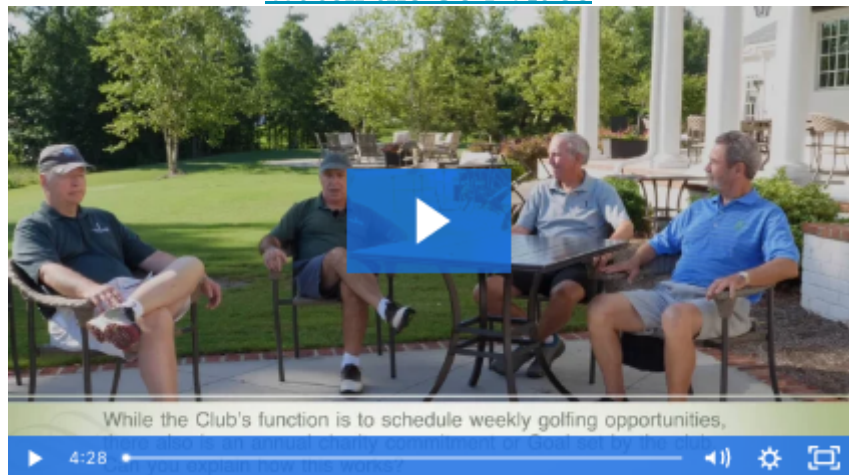


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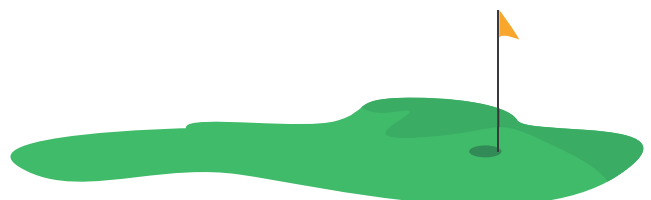
Fits Us to a Tee

While Carolina Preserve does not have a golf course, that doesn't keep anyone from enjoying playing weekly with neighbors. Take a few minutes to watch the video below created by the Golf Club to see who golfs, how it works, where they play and how you can join in on the fun.

[Watch the Golf Video](#)



Ready to play? Search on our website for golf clubs and join one today!





HOA President Comments

by Tom Crotty



While we all are following the National and State elections, we also are approaching election season for new Carolina Preserve HOA Board members. The Carolina Preserve Election Task Force will soon be sending out information and schedules for candidate registration, meet the candidates and a schedule for voting. There are four Board positions to fill this season. At our last Board meeting the four incumbent directors were asked to provide the Board with their intent to run or not run again. This takes a little soul searching for each director as it is a two-year commitment of time and energy serving Carolina Preserve. It also requires spousal or family input and support (especially important).

I am happy to report that Margaret Horst, Robert Griffith and I have decided to run for another term. The Board will be losing Burt Katz who has served on the Carolina Preserve Board four years and has been instrumental with ARC, started the Beautification Group, spearheaded the revitalizing of our entrances, been a liaison Board member on the Amberly Master Association and been my Vice President for three years. We will miss Burt and wish him the best and offer our thanks for all the time and energy invested. The three remaining board members, Carole Katz, Chet Sadosky, and John Siciliano will all continue to serve in the second year of their two year term in 2021.

The Board encourages residents to consider running for the Board. The Board is a cohesive group of residents with varied professional skills that work as a team to conduct the business of the Association and provide leadership and direction for our community. Carolina Preserve is a recognized professionally managed community that takes pride in execution of strategic plans to maintain and improve our community. Again, more information will be distributed soon by the Election Task Force. Please consider running and joining the solid Board in place to work together in setting direction and providing leadership for the next two years.

Serenity (Allforth) and Fun & Fitness (Finnbar) Pocket Park Revitalization Projects now Completed

The 2019 Strategic Plan called for creation of a Task Force to revitalize two of the five Carolina Preserve pocket parks. The Task Force members were Denise Allmond, Kathleen Casner, Tim Moore, Sandy Rusk, Barbara Weiss, Bob Willenburg, Tom Crotty, Burt Katz and Christine Hast. The pocket parks were over ten years old and had never had any attention. After inspecting each park, the Task Force discovered all were in a neglected condition with various problems: dead and dying bushes and trees, serious erosion issues, drainage issues, broken irrigation, lighting problems, damaged planters, pitted concrete, mold and stains, etc.

The Task Force got creative and decided that each Pocket Park should have a theme and that theme guided the Task Force in deciding how to enhance each park. Allforth was designated “Serenity Park” and Finnbar became the “Fun and Fitness Park”. The projects had limited funds available therefore the work had to be planned over two years. In 2019 the heavy work was done with clearing the landscape, fixing irrigation, and installing new sod. In the fall of 2019 and spring of 2020 bulbs, plants bushes and trees were planted. In 2020 the remaining major changes have been implemented. The following is a list of what was done to improve and enhance each park.



Allforth Serenity Park

- This park was power washed, the two pergolas were stained, and the benches cleaned
- The broken concrete planter was removed (safety issue)
- Irrigation was fixed
- A new piece of artwork for the entrance was installed
- A bike rack was installed
- Dozens of dead or dying bushes were removed and trees trimmed up and tree stumps removed – landscaping revamp is ongoing
- The landscape at the entrance was revitalized with dozens of new plantings
- Edging was installed around the entrance mulch areas
- The dead tree at the entrance was replaced with a 25-gallon Tamukeyama Dwarf Japanese Maple. This tree is reddish purple in the spring and dark crimson in the fall. At maturity, its size is 10 feet tall by 10 feet wide.
- Two water features have been installed
- A park sign with its new name was installed



Finnbar Fun & Fitness Park

This park was in the worst shape with some spots unsafe due to erosion. The biggest and costliest issues were the drainage and severe erosion.

- The old eroded mulch paths were filled in, new sod has been installed, dead shrubs have been removed and irrigation is again working
- Rose bushes were trimmed up and fertilized
- New edging or border was installed around all mulch areas to prevent drainage on to the track
- The pitted concrete entrance way was replaced with a great new look concrete area
- Two Golf Frisbee stations (donated to CP) were installed
- Dozens of plants, bushes and a few trees were installed around the park
- Colorful bulbs now bloom in the spring
- A park sign with its new name was installed
- Some landscape work on the entrance is planned for the fall 2020

This was a lot of change to schedule and make happen with the funds available in 2019 and 2020. The Task Force did a great job creating ideas around the park themes and researching cost effective solutions. Their efforts and contributions were fun and greatly appreciated. The community also must thank the Beautification Group for the over 100 hours of sweat equity they invested in these two parks. Thank them when you see them.



What's Next

In fall of 2020 a new Task Force will be initiated to tackle the Arvada Pocket Park. Then in 2021 a second Task Force will be formed to tackle Beckingham Loop. Just like in 2019, themes will be decided for each park. These themes will guide the Task Force in their efforts to revitalize and improve each park. How fast we revitalize each park depends on plans created and the funds available.

The Carolina Preserve HOA Board and GM



New Outdoor Pickleball Courts are Open and the Fun has Begun

In the midst of all the pandemic news, Carolina Preserve had some good news: **Pickleball Courts were officially opened for play on July 21st.**

It took over two years of planning and negotiating with the Town of Cary, and another four months of construction, but on July 21st the newest amenity was added to Carolina Preserve: Outdoor Pickleball Courts! Although pickleball has been played at the Amberly gym for 13 years, dedicated CP Pickleball Courts were identified in the Strategic Planning Committee as a much-desired amenity. Boy were they right!

In anticipation of the new courts, the Outdoor Pickleball Group was formed in December 2019. Interest picked up with the start of construction in March of this year. Membership accelerated as construction progressed and surged with the opening of the courts. By mid - August the group reached 152 with new members continuously joining.

To coordinate the new group and optimize the use of the new courts, the Outdoor Pickleball Advisory was formed in May with board members: Arlene Frederick, Linda Rosefsky and Debbie Merten.

The courts represent the first new amenity of substantial magnitude to be added to CP since the building of Bradford Hall. The challenge of the new group board has been to create an environment where everyone feels welcome and people enjoy the social aspects of pickleball.

The key to serving a very diverse group was to develop a court schedule with a variety of options. With the current system people can schedule to play with friends at a reserved time or can just show up and play during "Open Time" with members of a similar group e.g. men, women, mixed, beginners. In developing the schedule, time was spent discussing options with our own tennis group, the Carolina Arbors Pickleball President, and other venues. The current schedule represents a blend of these ideas. It will continue to evolve and be modified as we learn how the courts are used.

Although any new group has to expect startup problems and opening in the heat of summer in the middle of a pandemic would not have been our first choice, the response to the new courts has been overwhelmingly positive. A major objective of the group Advisory Board has been to have as many group members playing as quickly as possible. To achieve this goal, training classes were implemented within the first week under the leadership of Bob Hendrickson and Laurie Cherico. Approximately 70 members of the group played during the first month. Players ranged from first timers, playing with borrowed paddles, to seasoned veterans.

With the growing court usage, the demand for desirable time slots is increasing. The good news is that with the advent of the cooler weather and the installation of the lights, “desirable” time slots will roughly triple in the near future.

We are really in just the start of a very exciting journey with many ideas yet to be implemented once some of the pandemic restrictions are eased. As an example, we have identified Wednesday evenings for “social pickleball”. This is intended to create a fun environment for players and non-players alike. We hope the area surrounding the courts (yes, we even plan to use the “heliport”) will be the place to be for many CP residents to relax and socialize. We may even convert some of the non-players into players once they see how easy it is to play and how much fun it is.

If you haven’t done so already, time to start pickling!

Jim Hutchinson
President, CP Outdoor Pickleball Group



HOA Board's Most Effective Means of Communication with Residents

Over the past four years the Carolina Preserve Board has tried several means to communicate information to our residents. Email communication has not been effective as a low percentage of residents actually read the emails. However, the monthly HOA Newsletter started in December 2019 and published the first of every month has proven to be the most accepted and effective form of communication. The format of articles and pictures allow the Board and General Manager to address a wide range of timely subjects that have importance for our residents and community.

Carolina Preserve has a little over 2200 residents. The monthly newsletter is widely read as the statistics for number of reads show below.

April	1386
May	1481
June	1229
July	1422
August	1112



It takes considerable time and effort each month by the Board, GM, Board Committees and Kuester staff to create the articles and plan the format for the newsletter. Deborah Badger is our editor designer for each issue's layout and has done a great job. We have received numerous compliments about the newsletter from residents. Keep those comments coming.

After nine editions the Board, GM, Kusters staff, and Board committees have matured the newsletter format to include Board projects being worked on, General Manager updates, Task Force updates, Board Committee articles, financial status, personal profile of Board members, etc. Please remember that all nine editions of the Carolina Preserve HOA newsletter is easily accessible on our web site for easy reference. This newsletter is also available on the Carolina Preserve public website carolinapreserve.com.

The Clock Tower status report is being worked on and will come out separately from this newsletter.

The Board would like to try to reach even more residents so if there are subjects we are not addressing please send your ideas to the Board HOA.Board@cpamberly.net.

2021-22 Carolina Preserve Strategic Planning Update

By Tom Crotty, HOA President

Begun in November 2017, the Strategic Plan 2021-2023 represents the fourth time that the Carolina Preserve (CP) by Del Webb at Amberly Homeowners Association ("Community") has executed an annual planning process to set the goals and tactical objectives of the organization for the next year and longer-term directions covering three years.

The objective is that the Community Board of Directors and General Manager should help prepare the Community for a community-driven multi-year strategic planning process to occur from March through May annually, with budgeting scheduled to occur July-September.

The annual planning process has been led by the GM and HOA President along with the Board Committees, Kuester Staff and the Board of Directors (BOD). Special thanks go to the many CP Residents who participated in this year's focus groups (held in February and March 2020) and to Realtors who attended a special Focus Group providing valued information for planning purposes.

The complete 2021-23 Strategic Plan is on our web site. The following is a recap of the major milestones and updates from this year's Focus Group meetings and updates to the plan.

The 2021-23 Strategic Planning Process

This year's planning process started with a unique focus group in February with Realtors. Lots of valuable information was provided by the realtors. The following is a summary of the key takeaways from this Strategic Planning Focus Group meeting.

Realtors were extremely impressed with what our community has achieved the past two years. The vibrant look of Bradford Hall, revitalized entrances, the enhancements being made to the Pocket Parks, our Go-Green initiatives (Beautification and Adopt-A-Spot efforts), front desk realtor packet, continuing education classes, addition of Pickleball, the street appeal of our mature trees, and much more.

Realtors Comments about Carolina Preserve (CP)

- CP is one of the oldest of all 55+ communities within the Triangle area but it also has the best location of all the 55+ communities around the triangle area. CP needs to emphasize this more. How?
- Carolina Preserve also has the most organized HOA Board and management team proven out by the Strategic Planning progress, its marketing awareness, its strong financial standing, and recognition by the Community Association Institute for Excellence.
- Carolina Arbors is no longer new construction, yet very few resells available so far.
- CP Clubhouse has a classic, charming, and modern lodge feel which is attractive to buyers.
- Maturity of trees and foliage is a big plus with buyers
- Carolina Gardens by Del Web is coming online in 2021 (Active Adult Community in Fuquay-Varina):
 - 1) New Pulte floorplans
 - 2) Slightly lower price points (less expensive real estate)
 - 3) Pre-sells begin this fall
 - 4) 2021 will be tougher competition for CP



[Click the map to learn more about Carolina Gardens](#)

- CP monthly assessment fees are reasonable when compared to our competition, but do not factor into the decisions by buyers.
- CP's unique Amberly privileges and benefits trumps everything other communities have to offer.

Reasons people move out of Carolina Preserve:

- 1) Want a new home.
- 2) Don't use the clubhouse because they are actively involved with family.
- 3) CP Community is "clicky."
- 4) Moving to assisted living.

2021-2023 Strategic Plan Updates

Based on the CP resident focus groups, Realtor focus group and Board and GM recommendations the following objectives have been added to our CP Strategic Plan. The timing of these projects is still to be determined. Several projects will require new Task Forces to be formed. Some projects have urgency (safety) and others are costly and will require funds. Other projects require little costs and can be acted upon sooner. Some of the new objectives have already been completed. The items below are listed in random order.

New Strategic Plan Items added and completed

- Most realtors/buyers do not know about our Amberly relationship nor understand it because it is not highlighted or explained anywhere. CP must emphasize the Amberly relationship, amenities and benefits and show pictures or video.
 - A new Public CP website was implemented in March/May 2020 that promotes our community and many amenities including our Amberly relationship and benefits. In addition, the Lifestyle Director had a video created that shows these Amberly facilities. This new Amberly video will be made public during August 2020.
- Following winter our community had many uneven sidewalks potentially creating tripping hazards. We need a method to address and coordinate these hazards with Town of Cary.
 - Christine Hast established a task force and sent out a call for volunteers that was enthusiastically responded to by residents. Volunteers were organized by sections, given spray paint to mark hazards and executed a well-coordinated plan working with Town of Cary to address all our sidewalks. This will be repeated annually.
- The Fitness Center dumbbells are old and falling apart and need to be replaced.
 - The Fitness Center dumbbells were replaced in May 2020 and the new ones look great.



New Strategic Plan Items for 2021-2023

- Many resident homes are in violation for not power washing, dead lawns and dead or dying street trees. Realtors stated perspective buyers have been put off seeing these problems and potential sales have been lost. Residents must be reminded that they live in an HOA community and agreed to abide by these standards (Carolina Preserve Declaration of Covenants, Conditions and Restrictions, found on the Carolina Preserve Website) when they purchased their property. The Board and GM will tighten the rules governing these violations and enforce more vigorously.
- Realtors discovered during their focus group that Carolina Preserve has a very active and sizable golf community. Realtors stated this was a best kept secret and we need to advertise the Golf Community within Carolina Preserve as this will attract younger buyers. The Board authorized a video and it was created in July 2020 that highlights our golfing community. This video is now on Facebook and our new website.
- The Clock Tower re clad project will finish up by early 2021. Once completed the landscape in front of Bradford Hall will need to be replanted as most was removed for scaffolding for the tower project.
- The hot topic during the 2020 Focus Groups centered around the areas behind Bradford Hall. These include.
 - Revitalize the outdoor pool area providing more shade areas. Existing metal furniture is too hot to sit on. Can this area be covered, or furniture replaced?
 - How do we utilize the large concrete area behind the pool into something useful for residents?
 - The lower level waterfall feature behind Bradford Hall is broken and is beyond repair. What should we design in this space?
 - Build a pergola or covering for the concrete pad behind the outdoor pool.
 - Address landscaping areas by the pool, next to putting green and concrete slab.

In 2021 a Task Force will be formed to take all the items above and develop plans and determine costs for revitalization of these areas into facilities that are more attractive and can be enjoyed by residents.

- The community has a growing problem of spaces between homes not able to grow grass due to lack of sun, allowing standing water to collect for many days and storing of miscellaneous garden items such a large and small flowerpots, gardening tables, tools, etc. These all create unsightly messes, attract mosquitoes, etc. Plans are starting to be developed to address each of these problems and issue violations.
- Create plans for the remaining two pocket parks on Beckingham and Arvada. A task force to address Arvada pocket park is planned for late summer 2020. Beckingham Loop will be addressed in 2021.
- Remodel the men's and women's locker rooms on main level of BH. These areas are rundown, and ventilation is poor.
- Better lighting in Pottery Room
- Promote our location bordering the Jordan Lake Preserve. Additional building around the nature preserve is prohibited resulting in less future traffic, etc.
- Replace faded street signs throughout CP.
- Cushions on outside furniture (veranda) look bad and should be replaced.
- Need someplace for indoor pool users to put towels, etc.





Carolina Preserve (CP) Landscape Updates

Heading into 2020 the Board and GM knew we would have challenges with landscaping due to new landscaping contracts awarded for the CP perimeter areas and all interior landscape areas. We parted ways with YardNique after 10 years. Resident complaints about YardNique over the years reached a new high after the weed fiasco in 2018 and 2019.

Hansley Landscaping was awarded the contract to maintain the perimeter areas that the Amberly Master Association had previously maintained. BLAND Landscaping was awarded the contract covering all areas previously managed by YardNique.

The two landscape companies took different approaches to hiring staff to work and maintain the Carolina Preserve landscape. Hansley Inc. is a family owned and run business. They decided to bring in experienced, trained staff that had been employed by Hansley for some time and are under the direct management of Mike Ferrell (Owner of Hansley). Bland Landscaping Company serves all major markets throughout North Carolina, including the Triangle, Triad and Charlotte-Metro regions. BLAND choose to hire entirely new staff including supervisors and Account Manager. Many of their staff never worked landscaping jobs (most were restaurant employees) before and none ever worked for BLAND. BLAND's direction to staffing required an emphasize on landscape training for mowing, weeding, edging, pruning, aeration, blowing, etc. It also placed a heavy emphasis on the BLAND supervisors and the account manager to both manage personnel, blend them into teams and train on the job. Only the BLAND irrigation team was experienced, well trained BLAND employees that were transferred from other areas of the triangle. This is probably why the BLAND irrigation team has done a good job fixing and getting the irrigation to run correctly. Much better than YardNique ever did.

Hansley Inc. has performed well. Our perimeter looks great. Over 100 of the dead Leyland Cypress and Arborvitae trees were removed and many more trimmed and treated. The rest of the landscape was timely pruned, fertilized, aerated, and mulched. Our entrances look good and communication between Mike Farrell and Christine Hast has gone smoothly.

BLAND has not performed anywhere near what the Board and GM expected. The root of the problems were the experience, training, supervision, and work ethic of the newly hired BLAND staff. This did not show itself until mowing season started in late April. They used the wrong size equipment, did not work as a team, they left messes, their quality control was poor and their follow up on damage work orders was poor.

The Board and GM elevated our issues to BLAND Corporate in June and finally in July the Board and GM demanded staff changes and started withholding funds. August was a month of major changes for both Hansley and BLAND. After months of discussions with BLAND Management the Board and GM request for major changes finally occurred.

Both Landscape contracts were modified to address realignment of responsibilities. Hansley was given the CP perimeter from O'Kelly Chapel Rd down Pittard Sears including the Blackfriars Loop and McConnell entrances plus the areas surrounding Bradford Hall and the Tennis and Pickleball courts. These areas already look much improved as Hansley has removed dead or dying shrubs and raised the canopy of dozens of trees and reshaped the rest of the foliage. Hansley also plans to spend considerable time and effort improving the landscape around Bradford Hall. These areas have been neglected for years by YardNique and BLAND had no time to address. They have already removed the dead and damaged plant and trees and pruned the trees. The areas already look much improved. Hansley has also weeded and spruced up the Blackfriars and McConnell entrances and put down fresh mulch. More landscaping is planned between now and the fall. Look for changes around the parking lot and entrance to Bradford Hall. By next spring, our clubhouse should start to have a new landscape look.



It took BLAND a few weeks to make arrangements to transfer knowledgeable and experienced personnel to the Carolina Preserve account. On August 10, a new, experienced BLAND Account Manager Steve Hendricks started along with two new supervisors. All but two of the original staff were replaced with seasoned BLAND personnel transferred from other locations. This means BLAND is starting over with new teams of workers and managers. The Board and GM started a walk around program and meet with the BLAND Account Manager, Mondays to provide direct feedback on our observations from the past week and emphasize areas still needing attention. August was a critical month to evaluate BLAND's new teams as they performed the weekly mowing, weeding, edging, cleanup, corrected damages and started the next pruning cycle.

The new BLAND teams have only been in place about 3 weeks or 2 mowings. Overall Bland's new personnel are doing better but still not where they need to be. Mowing is better, but they really messed up mowing and damaging very wet areas in the community after the rains the middle of August with the big mowers. Edging and cleanup are improved but is not yet consistent. Spraying for weeds and mulch bed wedding is happening but slowly. Quality control is better but has a way to go. Irrigation is performing smoothly. Several long-standing damage work orders have been closed and less are being opened. It has been an uphill battle but, we hope BLAND has started to turn the corner.

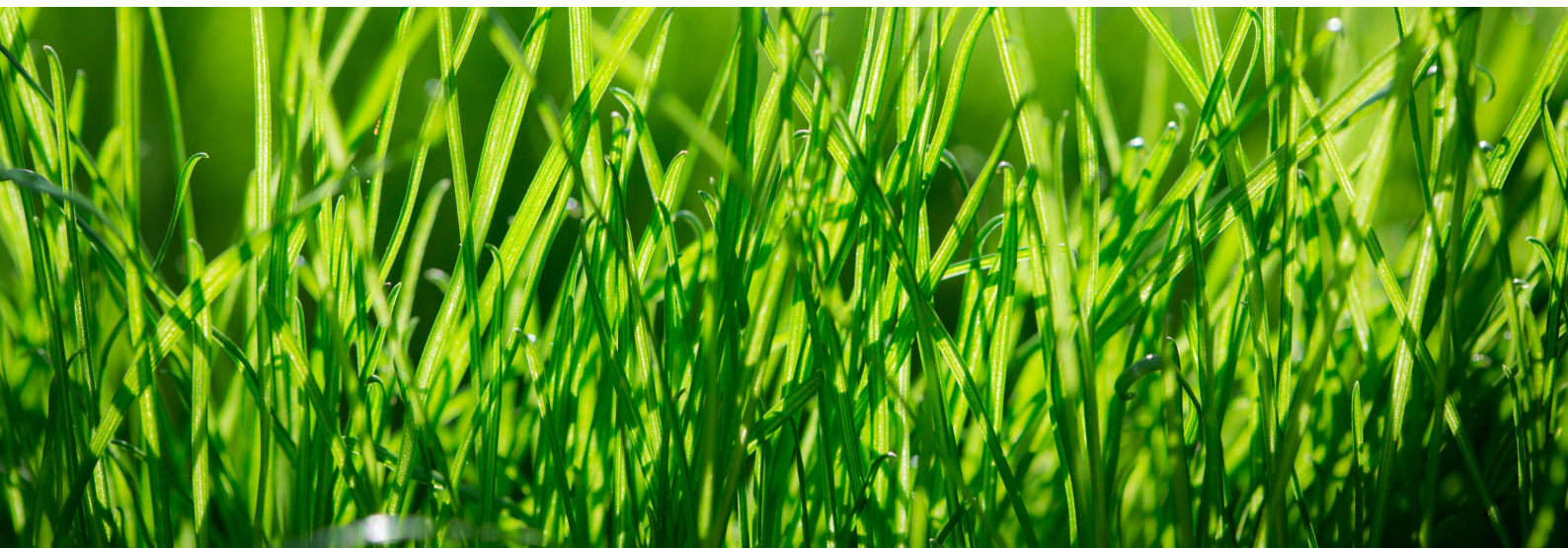
After the two mowings with the new crew (week of August 24) and having some experience with learning the landscape and after the damage to the wet areas BLAND implement many changes.

1. BLAND will no longer use the big ride on mowers. They will use walk behind mowers and have added three more smaller mowers and one 36" push mower. They might reintroduce the large mowers to the parks and larger open areas in the fall but not residential homes.
2. After heavy rains if an area is deemed to wet to mow BLAND will put flags out and inform the resident and Christine, they are skipping these areas because of wetness.
3. For better quality control BLAND has started a system of walk behind that hopefully will help with any missed spots no matter the reason and call teams back to redo areas missed or done poorly.
4. Steve Hendricks (BLAND Account Manager) implemented earlier start times, modified lunch times and quitting times to become more productive.

5. Soft edging will now be done with actual edge blades and not string trimmers.
6. A third truck has been added with the purpose to detail follow-up for spraying, dog stations service, etc.
7. Work orders are being completed with many siding, screens and mailbox repairs completed. An additional person will help Steve get caught up on the backlog.
8. Pruning is going well with sections 1 and 2 completed.
9. BLAND will start to use a granular pre-emergent weed control product in September.

September will provide the Board and GM four more weeks to evaluate performance. The Board will continue to withhold funds monthly until BLAND performs up to the contract.

The BLAND personnel now assigned to Carolina Preserve are new and did not create or cause all the mistakes and damage created by the prior teams. Please give the new workers and teams a chance to earn your respect and trust in managing our landscape. The Board and GM have met many of these new people and they are a big improvement from the prior teams. We ask residents to be patient and give these new BLAND teams a chance. In the meantime, the Board and GM will continue to meet every Monday with BLAND to discuss progress and additional changes.



Carolina Preserve COVID-19 Reopening Update

Since the beginning of this COVID-19 pandemic the number one priority of the Board and GM has been the health and safety of our residents and staff. Our Carolina Preserve community as a whole has done well. The Board and GM want to emphasize to all residents the need to continue to follow CDC and Governor Cooper's recommendations to Wear Masks, Wash Hand Frequently and Social Distance. Now is not the time to lower our guard.

During August Governor Cooper wisely delayed moving to Phase 3 because our virus numbers were not doing well. Therefore, he delayed any Phase 3 announcement until September 11. During this time many colleges and universities started classes and resulting in dozens of COVID clusters and hot spots effecting over one-thousand people. The Board and GM await the Governors recommendations on September 11 along with any new mandatory requirements with his next announcement.

Note: The Board and GM have not been informed of any additional residents that have tested positive for COVID-19. But we have been informed by way of third-party rumors that residents have tested positive. We have no way of verifying if any of these rumors are true. Therefore, please remain diligent and Wear Masks, Wash Hand Frequently and Social Distance.

Staffing

Less than half of our Front Desk staff (all Carolina Preserve residents) returned to work after we reopened our doors. In August, two asked not to be scheduled due to concerns about working indoors with many residents passing through to go to the pools. That leaves us with seven Front Desk staff. There are other Front Desk staff that will be unavailable because of prior commitments in September. Christine Hast will be looking to hire more Front Desk staff (preferably CP residents) as the opening phases change. If interested, please email gm@cpamberly.net. Again, we have taken many precautions to protect the safety of all of our staff and strictly enforce social distancing within Bradford Hall. Existing staff will be adjusted to provide the necessary coverage. Please be patient as we work through these challenges.

Pools

Pool reservations are working smoothly, and residents are being good about cancelling reservations. A number of requests have been received to open a fifth lane for lap swimming in our indoor pool. The reason this has not been done is the areas for the fifth lane also includes the steps and the ramp and there must be enough room for egress and ingress to the pool, so swimmers using this lane might be interrupted. So, in September we will try adding a fifth lane and see how it goes.

Fitness Center

We have plans in place to allow the Fitness Center to open with limited capacity and with a reservation once Governor Cooper says we can open. We are awaiting any additional mandatory requirements for the center's reopening. Procedures for wearing masks, using wipes, hand sanitizer and a staff cleaning schedule will be sent out once the Governor gives the go ahead.

Next Steps

The Board and GM at the September 14th Community Meeting Webinar starting at 6:30 pm will review what we anticipate reopening of Bradford Hall will include between now and end of 2020.



Click the box for the latest North Carolina Safer at Home updates and the phased approach to recovery.



2020 Financials at A Glance

Operations (\$000)

	July YTD		Full Year	
	Actuals	B/(W) Plan	Plan	Forecast
Income	\$2,324	(-\$21)	\$4,027	\$3,950 - \$3,970
Uses				
Reserves	\$269	\$4	\$505	\$507 - \$511
Expenses	\$1,922	\$156	\$3522	\$3,280 - \$3,310
Net	\$133	\$139	\$0	\$129 - \$183

Note B/(W) plan means: B is a positive number: higher income or lower expenses
(W) is a negative number: lower income or higher expenses

Reserves (\$000)

	Replacement	Villa	IIF	Painting	Operating Contingency
12/31/19	\$922	\$285	\$88	\$14	\$656
Contributions	\$222	\$13	\$33	\$1	\$0
Interest	\$10	\$3	\$0	\$0	\$0
Expenses	-\$165	-\$21	-\$58	\$0	\$0
Clock Tower	-\$17	\$0	\$0	\$0	\$0
7/31/20	\$972	\$280	\$63	\$15	\$656

By Chet Sadosky, HOA Treasurer



Treasurers Comments

By Chet Sadosky, HOA Treasurer

Our July year to date net income/expenses is \$133k better than plan due to the following:

- \$8k income from Amberly paying back funds not spent in 2019 for the perimeter maintenance.
- \$63k less expense from the Covid-19 impact. Bradford Hall utility spending is down \$26k, front desk payroll is down \$28k and Lifestyle is down \$9k (this results from \$37k less expenses offset by \$28k less revenue).
- \$39k less landscaping spending. The budget assumed that we would need additional funds (\$40k) in the first half of the year for the landscaper transition. We will spend some of these funds in the second half.
- \$10k less expense due to delayed Villa reserve contributions; this will be zeroed out by year end.
- \$13k less expense for all other accounts. Two less salaried staff (\$35k), reduced Admin expense (\$7k) and other accounts (\$6k) offset by greater than plan marketing (\$21k) and consulting (\$14k).

The 2020 full year updated forecast shows a greater surplus since the governor's Covid restrictions has kept Bradford Hall and all of activities shutdown longer. We are forecasting that CP will have a surplus in 2020 of \$129k-\$183k. We continue to range our forecast due to several areas which cannot be forecasted precisely, such as the number of trees that will be replaced in the fall, retaining wall and storm water maintenance, legal fees for review of contracts, additional landscape spending.

Please note that whatever the 2020 surplus turns out to be, **it will be used to fund the Clock tower project.**

2021-2023 Budget

Please plan on attending one of the two virtual Budget presentations on Tuesday, September 29th. We will go through the 2021/23 budget in detail. There will be an opportunity to ask questions during the virtual presentation as well as sending questions/comments to the Board between September 30th and October 13th.

Delinquencies

The number of delinquent accounts dropped at the end of July from 19 to 11. The total amount also dropped from \$5248 to \$5190. The Board thanks those folks that brought their accounts current.

MEET THE BOARD

A Carolina Preserve Series



BOB GRIFFITH

In this interview series, we get to know a little bit about your HOA Board volunteers - where they are coming from and what's important to them.

To get started, can you share a little something about what it was like growing up?

I had the good fortune of growing up in a small town in the Finger Lakes Region of New York, Watkins Glen, a small town on the foot of Seneca lake. The village owned a portion of the land and had a terrific park on the property. That's where I spent my summers, learning to swim, play baseball, tetherball, and doing crafts like boondoggle. While there I had the opportunity to eat sweet treats like Sugar Daddys (Who remembers those?). I have so many fond memories of those days.

Despite the idyllic moments, my youth had its share of challenges. I'm the youngest of three and my brother, the eldest has significant developmental disabilities. When I was 3 years old, both of my parents were placed in a tuberculosis sanatorium. My sister and I were placed with a family we did not know, and my brother was placed in a "state school". The picture accompanying this article is of me at age 3 visiting my parents on Easter Sunday. I could only see them through the window. (Wow, sounds too much like today).

After my parents were out of the hospital I had to be hospitalized on several occasions. Ear surgery, hernia repair, and a burst appendix when I had the measles. There was no health insurance in those days, and this was a tremendous hit on the household economy. My father was no longer able to work as he had had his third bout with TB. There were days we literally went without a meal so other bills could be paid.

My mother was an incredibly strong woman and operated a beauty shop in our house and that is what sustained us for years. She worked long hours and was highly successful. Mom was an amazing, hard working woman who was a strong role model for my sister and I. She valued education and rare was the day I didn't hear "you have to go to college and get a good education to get a good job." (My generation was the first to go to college in my family).

Moving forward, I did go to college and like many freshmen I wasn't sure of the future. It was 1970, my draft number was nine and the Vietnam war was still going on. I attempted to enlist in a Naval ROTC program but was turned down due to my hearing loss. I was disappointed and angry that I could not serve my country.

Fast forward. July 24, 1976 I marry the love of my life after completing graduate school and receiving a degree and certification as a School Psychologist in the state of NY. We bought a house in a small town in upstate NY where we raised our two children. Wow, having Kids. Wonderful, scary, challenging, at times stressful, but golly gee absolutely worth it. Our son is an attorney and our daughter is a Physician's Assistant.

Much of what an HOA deals with is related to homeownership. Tell us about buying your first house.

1978, we bought our house, a three-bedroom ranch. I had always thought this was my American dream. Fortunately, it didn't become my American nightmare, but it did require a lot of work year-round. I learned a lot of skills I had never anticipated learning. How to fix a leaky sink, how to change an electrical outlet, how to plunge a toilet and many more. I certainly acquired a lot of tools and equipment in the process.

When you speak about retirement, what do you say?

My children marvel at the lifestyle we live as retirees in CP. They're very happy for us and enjoy hearing about what we do. My daughter keeps complaining that she won't be able to have a retirement like ours. I say save! Think about where you want to be in 25-30 years and plan accordingly.

Describe a perfect day

When my wife and I first moved here there was seldom a day we didn't look at each other and say "I'm so glad we moved here!". For me a perfect day in CP means we've had a chance to use the fitness center, walked around the neighborhood talking with friends, and then going to a group or club event for the evening. I sincerely hope we get a vaccine that will allow us all to be able to do that safely again.

What's in your Netflix Queue and on your Ipod?

Fortunately we have an internet service providing a variety of viewing options. I'm a history buff and science fiction fanatic so those are the areas I look at on Amazon Prime and Netflix. Currently I'm watching a four episode show on Prime called "The Dawns Are Quiet Here". It's a Russian film about a Russian Unit far from the front that is threatened by German saboteurs. I'm not a great fan of movies with subtitles, but I'll endorse this one.

As for music my iPod is pretty eclectic: country, rock, classical music, musicals and jazz. If I like the sound it's terrific and has a place on my playlist. I recently added "Rhapsody in Blue" by Gershwin and "Southern Cross" by Crosby, Stills, and Nash.

Is there anything else you would like to add?

CP is an amazing place with an amazing number of wonderful friends and neighbors. It's the folks that live here that make this a place such a wonderful place that I want to support and serve. And, I believe we will get through this and there will be more adventures, positive adventures, for all of us to look forward to.



Carolina Preserve Homeowners Association, Board of Directors Election for 2020

By David Jackson, Election Task Force Chair

The end of the summer season marks the beginning of the Carolina Preserve HOA BOD Election Season.

There will be four vacancies on the HOA Board for 2-year terms beginning January 1, 2021 through December 31, 2022.

An Election Task Force (ETF) comprised of Sharon Adamo, Jeff Diton, David Jackson, and Sharon Valvona, along with Deborah Badger (CP staff liaison) and Burt Katz (HOA Board of Directors liaison), have begun their work in conducting the election per the CP ETF Charter.

There will be a call for candidates inviting all individuals interested in serving. Publicity will include a virtual Meet the Candidates session. Voting will be concluded on Friday, November 6.

Watch your email and other CP publications for additional information regarding the upcoming HOA BOD election.

Arvada Pocket Park Task Force

Following along with our Strategic Plan, we have selected the next task force for the Arvada Pocket Parks. The members contacted were selected from the many Volunteer Forms that were submitted during our Volunteer Drive Meet and Greet last year! Don't worry if you were not selected this time around, there is one more pocket park to go!

The Board President, Tom Crotty, Christine Hast and Robert Hamilton along with back-up from the Beautification Group, the Task Force will start with inspecting the park to assess its current condition and listing all the issues found.

Focus will be on aesthetic appeal, functionality and enjoyment and landscaping. The completed Serenity and Fun & Fitness parks will serve as examples. Priority of all considered recommendations will benefit the majority of our community and solutions that require low maintenance and minimum upkeep.

We will keep you posted!

ARC Makes it Easy For You

By Ken Merten, Architectural Review Committee

Accessing the Design Guidelines

If you are considering a change to your yard or the exterior of your home, you must become familiar with the Design Guidelines. A few projects can be made with “No Approval Required”, and some by simply turning in a “Fast Track” form (FT). Other changes may need additional evaluation by the Architectural Review Committee (ARC) before approval, and require a more detailed “Modification Request” or MR.

All of the needed information to see what your project will require is available on the CP website. Simply, log on and look for the horizontal blue bar across the home page. Put your cursor on “Governance”. Then click on “Committees and Task Forces”, then “Architectural Review Committee (ARC)”. Once you open the “ARC” page, you will see that the Design Guidelines document is available in both PDF and Word formats. In addition, you will find the Modification Request form, Fast Track forms, and supplemental documents providing detailed information on “Swale and Drainage Projects”, and “Solar Panels”.

The ARC always has a member “on call”, available to answer questions via email - architectural.committee@cpamberly.net. However, please review the “guidelines” first before contacting ARC, and then if there is still a question, email ARC.

You may want to print out this page. This will make it easier in the future, if you are considering a modification to your home / yard, and to help begin the process of submitting a MR or FT.





Additional Trees Added to the Approved Tree List in the Design Guidelines

In order to give the community some additional options for Street Tree replacements, four new trees have been added to the current list of approved trees outlined in the Design Guidelines in section “3.3.25 Trees”. It’s important to note that these new trees can be found in multi-trunk and single trunk species, much like the Crape Myrtles. If you choose one of the below trees, they must be single trunk, preferably with the limb spread as high as possible up the trunk so that the trees look like trees and not like shrubs.

When submitting your Modification Request (MR), please be sure to include all of the “MR Requirements” detailed in red print in the Guidelines. The tree you purchase must meet the minimum height of 8’ and a minimum caliper / diameter of 2”, measured 6” above the ground. If your new tree is smaller than the minimum requirements, you will be subject to a violation from Kuester Management and must purchase another tree that meets the requirements.

- Fringe Tree, single trunk – Small to medium sized tree.
- Emperor Maple, single trunk – Small sized tree.
- Coral Bark Maple, single trunk – Medium sized tree.
- Musclewood, single trunk – Medium sized tree.

Medium size = 20’ to 30’

Small size = less than 20’



Status of New Resident Initiative

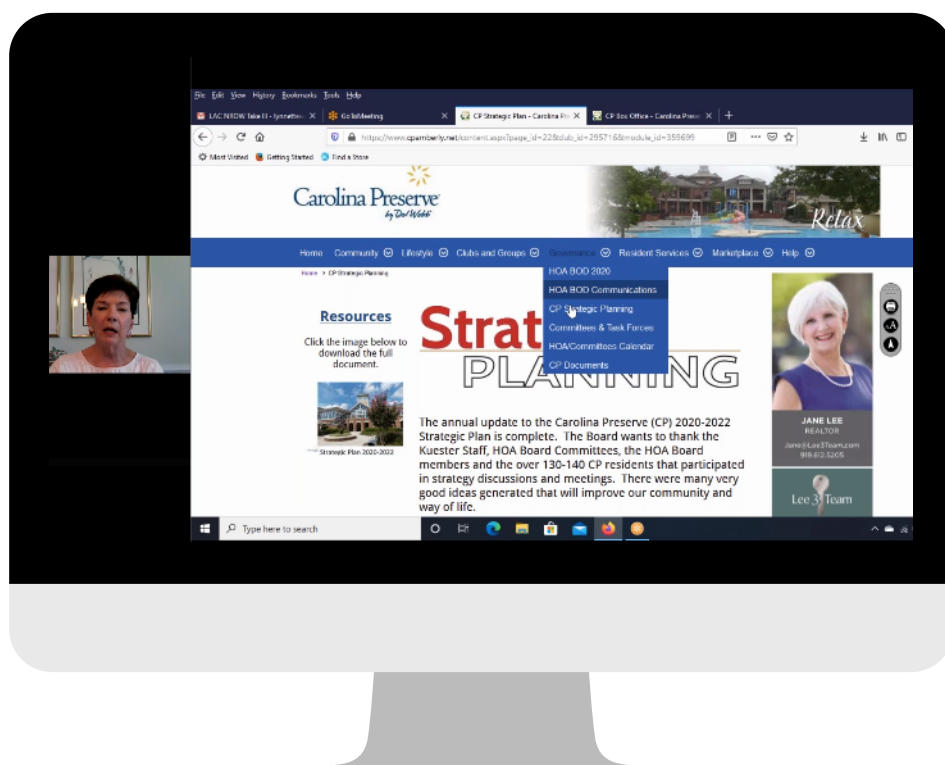
By Lynnette Womble, Lifestyle Advisory Committee

Per the article in last month's newsletter, the Lifestyle Advisory Committee (LAC) created a temporary substitute for the in-person New Resident Orientation Workshops (NROW) discontinued due to covid19. Lifestyle Director Deborah Badger recorded a video in which HOA Board member Carole Katz delivered a welcome introduction to new residents, and NROW Coordinator Lynnette Womble provided a demonstration on using the CP website.

Eleven volunteer ambassadors have been contacting new residents, first by phone, with a personal welcome to the community. This is followed by an email with an attachment containing links to the CP website and to the demonstration video. Kuester staff is contacting new residents pending their closings to make an appointment at Bradford Hall to obtain their Identification Cards and website logins. However, the CP website contains a contact form which new residents can themselves submit to help expedite the process.

At the time of this publication, almost 50 new 2020 households have been contacted.

A link to the website demonstration video has also been posted on the CP website as a reference for all residents. Click on the "Help" section at the right of the blue bar on the home page and select "New Resident Website Info". The SharePoint page will take a minute to load. Then select "New Resident Online Website Orientation" to connect to the actual video.



Lifestyle Advisory Committee Scavenger Hunt

By Carol Randall, Lifestyle Advisory Committee

Carolina Preserve resident “Hunters” searched for answers to the clues presented in the Lifestyle Advisory Committee’s Scavenger Hunt event. Clues and answers were developed by members of the LAC, who had a lot of fun putting them to rhyme. Ten clues were presented in the August 7th Lifestyle Newsletter, with an additional 10 clues (more difficult) in the August 14th issue. Each clue described a feature at Carolina Preserve. Hunters were asked to submit photos as proof of answers to the contest, which ran over a span of two weeks, from August 10th through midnight August 23rd.

The triumphant Carolina Preserve Hunter was Judy Smith with 15 correct answers, winning a bottle of Bradford Hall Reserve wine.

Cheers to everyone who participated in the latest Lifestyle event. Special thanks to LAC members Dennis Curtin who wrote the Newsletter Articles and prepared the answer sheet, and Sandy Rusk, for her editorial assistance.



Bradford Hall Book & Puzzle Collection

Interim Steps

We do not yet know when Bradford Hall will open. Cara Lehman, Book Club co-chair, is leading the effort to define best practices for how the Book Club volunteers can safely collect books and puzzles to refresh the Bradford Hall library when we do open. Under ordinary circumstances, CP receives more books than we have space for. You may be collecting books and puzzles in anticipation of our opening. Please read below for guidance from Cara, and Book Club representatives, on how you can help us manage the likely deluge by beginning to filter your collection now.

Books, Puzzles and Magazines for Bradford Hall Reopening

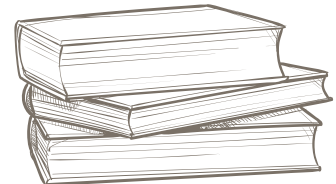
We are a community of readers and usually receive 100+ books a month, more than can fit on our shelves. **Therefore, when we reopen, you do not need to return books.**

What books to save for the Bradford Hall Library?

Fiction is the most popular and we have one bookcase for non-fiction: biography and history only. We **do NOT accept** books on cooking, art, gardening, medical, how-to, political, diet, self-help, travel, textbooks, or other non-fiction.

What we need:

- Books in Like-New bookstore condition
- RECENT fiction: novels written in the last 1- 3 years
- Popular biographies and history
- Large-Print-we always need more



Where to donate your other books?

Dorcas Ministries, known for numerous outreach programs in our communities, welcomes these other books, puzzles & household items in good condition. Nearby at 187 High House Rd, Cary, they are open Monday- Saturday for drop-off and shopping.

Also, check with Goodwill or your favorite charity.

Puzzles were cleared out. Puzzles will eventually be collected to restock the cabinet. Do not save puzzles with missing pieces for Bradford Hall. **Please put puzzle pieces in a plastic bag inside each box. Tape shut.** As with books, you don't have to save them. Dorcas will also collect puzzles or check with your favorite charity.

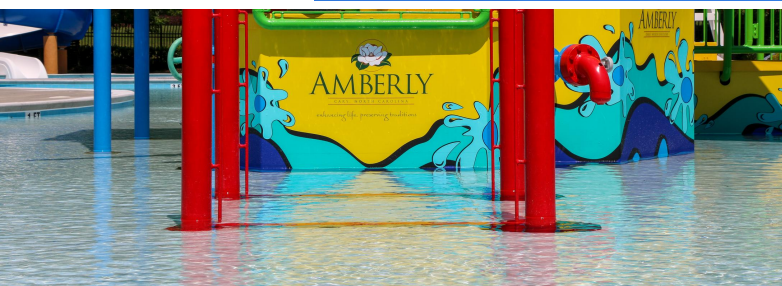
Magazines- Do not save.

Amberly Master Association

Amberly Master Property Owners Association owns and operates the amenities found at the Residents' Club, and throughout its common areas and is managed by York Properties. Current residents living in any of the eight sub-associations of the Amberly Master plan are eligible for access to these amenities.

Carolina Preserve residents accordingly belong to Amberly Master and have access to the Residents' Club, pool and all their various events. This is an amazing benefit! Like the bubblegum, "double the pleasure, double the fun!" Be certain to sign up for the Amberly website to receive emails about their fitness classes, pool updates and special event registration.

[Watch the Amberly Video](#)



U.S. Census 2020

If you have not had the opportunity to complete your Census, please do so today. The 2020 count affects local government resources for years so participation is critical. Click below for more information.



U.S. Elections

The Board thanks the Democratic and Republican Clubs for working so closely together to provide voter information to Carolina Preserve. If you missed it, click below for details from both the Chatham County and Wake County Board of Elections as well as the comprehensive FAQs created by our clubs specifically for Carolina Preserve.



Violations Notice

by Robert Hamilton, Facilities Director

Since taking over parts of the Operations Directors duties of ARC Modification Requests / Fast Tracks and Violations, I wanted to review briefly the process that will help move submission more quickly and make it easier for the residents of Carolina Preserve.

Modification Request / Fast Track information can be found in the design guidelines on our Carolina Preserve Website. Please take the time to read this information when preparing for your project. There is specific guidance on how to complete the applications and we have a wonderful group of Volunteers that have a lot of knowledge to help you. If you are not ready for the project don't submit it, even if you have a good deal with a vendor for a group price, it is not always the best way to go. And make sure even if it's a group project with a contractor you are responsible to ensure the work completed at your home, follows the guidelines. Please remember, in the end, the completed project falls on you, the homeowner and the contractor you have chosen. If you fail to direct them or allow them to cut corners, then the project could end as a violation and costing you more money to have it re done correctly.

Violations are not fun, and I would prefer not to do them. But standards within the community must be kept and are needed. The Carolina Preserve Declaration of Covenants, Conditions and Restrictions, found on the Carolina Preserve Website, is what is used at Carolina Preserve and was established by PULTE and every resident agreed to follow when you purchased your property. Most of the violations issued are ones that could easily be taken care by the homeowner before they are issued. For example pressure washing, mail boxes, dead or dying trees and bushes on your lot and overall general appearance items. These items are sometimes seen by management and most often reported by other Homeowners. As homeowners and part of an HOA, it is important to comply with the governing documents for the good of the community. I too live in a HOA and I do whatever it takes, whenever I can in a timely manner to keep the management company from sending me a letter or coming by. Please be proactive and perform the routine maintenance on your home before I must issue a violation.

Architectural Submissions

Everything you need to know for Architectural Submissions

Robert Hamilton is your staff liaison to the ARC Committee and will be processing all architectural request submissions.

He can be reached at Roberth@kuester.com

A box labeled ARC Modification Request and Fast Tracks is beside the front entrance at Bradford Hall.



Note: All Modification Requests to be placed on the agenda for consideration, MUST be turned in at Bradford Hall by:

Wednesday 12 noon - Seven days before the scheduled meeting

(Meetings are held twice a month: 2nd & 4th Wednesday)

Please note the box is for architectural requests only – no other forms of communication will be accepted through this box.

If you email your request, it must be in PDF form and not by a picture from your phone or JPEG.

Villa Irrigation New Days and Run Times

By Christine Hast, General Manager

A positive thing this year, the HOA Board approved to have Bland Landscaping Company Irrigation Technicians assess and inspect the entire villa irrigation system and replace or repair all issues.

As indicated in the Landscaping weekly update, the days and run times are changing. I have also added a little extra information just for knowledge and how the irrigation works:

Finnbar Villas: There are 55 zones and takes 9.33 hours to run through the whole system. Run Days are now – Sunday – Tuesday - Thursday. 10:00 pm to 7:00 am. 10 Minutes each zone

Lifeson Villas: There are 43 zones and takes 7.16 hours to run through the whole system. Run Days are now Sunday-Tuesday-Thursday. 11:00 pm to 6:00 am. 10 minutes each zone

Lelcester Villas: There are 16 zones and takes 2.6 hours to run through the whole system. Run Days (unchanged) Monday -Wednesday – Friday. 4:00 am to 6:30 am 10 minutes each zone

Del Web Villas and Horn Church Loop Villas: There are 40 Zones and takes 6.6 hours to run through the whole system. Run days are Sunday -Tuesday-Thursday. 11:00 pm to 5:00 am. 10 minutes each zone.

With most of the repairs made so far, we have had very few complaints. They are still repairing the last few items, but sometimes a spray head, water pipe or drip line will malfunction, that is just the nature of irrigation that is over 10 years old. And we ask that you submit a work order through the CP website.

Also, if you are having bushes, a tree removed or any landscape project in your yard or work done around your home, if your hired vendor accidentally hits a waterline, dripline or sprinkler head, Those damages are the responsibility of the owner and Bland will invoice you for any repairs.





Make A Date with your Calendar

By Christine Hast, General Manager

As we begin our busiest time of year- Budgeting, HOA Board Elections and the annual meeting, Everything will certainly have a different look. Due to the Covid Pandemic with group meeting mandates and distancing, Carolina Preserve will be going virtual online – you can attend from the comfort of your homes or your back patio.

Here are the dates to save for your calendar:

September 14 – Open Community Meeting 6:30 pm

September 29 – Community Budget Review 10:00 am & 6:30 pm

October 7 - Meet the Candidates 6:30 pm

November 17 - Annual Meeting 6:30 pm

Please watch your emails for Board election information, voting and meeting invitations, and remember to check your spam or junk folders too.

One More Try

By Christine Hast, General Manager

Catching up on Assessments.

I know it sounds like a broken record. There are still some owners who at the beginning of the year sent in one or two payments for the incorrect amounts when the 2020 dues increased. They are small amounts, \$10.00 here, \$12.00 there Some are \$25 and some are substantially more.

Please check your account balances to ensure you are caught up on your amount due. If you would like a copy of your full account balance, please email me and I will email your account ledger to you. Christine@kuester.com

In fact, this is a great opportunity to sign up for AUTO DRAFT through the Kuester Management website: www.kuester.com.

If you haven't already, log- in by creating an account with your username and password and complete the Auto Draft form. Kuester will do the rest for you! You will never have to worry again about paying the correct amount or mailing a check.

This also saves the HOA \$1.39 per month per owner to mail statements or monthly delinquency reminders.

888-600-5044 support@kuester.com



Owner Support



Help Center



CUSTOMER LOGI



About Kuester ▾

HOA Management Services ▾

HOA Management Locations ▾

Blog ▾

Contact Us ▾

Homeowner Features

Finally give your homeowners access to online features and functionality that they have come to expect. Providing owners with 24-7-365 access of their account information will lead to a more satisfied community.

- ✓ Sign up for Direct Draft Payments
- ✓ Security Features for Protection of Owners and Board Members
- ✓ Make Echeck or Credit Card Payments
- ✓ Make Online Requests to Management Company or Board



2020 Committees

Architectural Review Committee

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

Club & Group Advisory Committee

Karen Baker | Larry Brown | Judith Dorezas |
Joel Glassman | Linda Laurich | Paulette Shekell

Finance Committee

Melva Brown | Kathy Dunn | Eugene Harshbarger |
Bill Lazcano | Paul Wolf

Information Technology Committee

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

Lifestyle Advisory Committee

David Baker | Dennis Curtin | Glenn Hains | 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

HOA Quarterly
Community Meeting
September 14 | 6:30pm

HOA Board
Working Meeting
September 15 | 10:15am

2021-2023 Budget Review
September 29
10am & 6:30pm

Meet the Candidates
October 7 | 6:30pm

Annual Meeting
November 17 | 6:30pm

All meetings are held online
via GoToMeeting or GoToWebinar