

FEBRUARY 2021 ISSUE XV

# CAROLINA PRESERVE

HOA NEWS

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## RAISE THE ROOF!

Tower Project  
January 21, 2021



Photo credit: Christine Hast





# HOA President's Comments

*by Tom Crotty*



Like all homeowners and residents living in Carolina Preserve, the HOA Board of Directors are members of this community just like everyone else.

We chose to volunteer to run for the Board because we felt we had experience and knowledge that could contribute to the well-being of our Homeowners Association. The Board takes being the fiduciary guardians of our association very seriously. We work well as a professional team facing the challenges of managing a community of our size and being proactive and, at times, creative in keeping our community looking good and running smoothly.

The Board works closely with our General Manager and staff overseeing their operational management of our community. Christine Hast, Robert Hamilton, and Deborah Badger are highly experienced and have a wide range of skills. The Board has great faith in their ability to manage all operational aspects of Carolina Preserve. This allows the board members to focus on strategic and financial management for our community. This monthly newsletter along with Board meeting minutes provides transparency into what the Board and General Manager are doing and planning. Over the past five years this model has worked very successfully and is our model for the future.

Last year (in July/August) when the Election Task Force sent out requests for candidates to be on the HOA Board, we only received one new candidate.

Fortunately, three Board members with expiring terms were all eligible to run again and decided to do so. We had four open positions heading into 2021 and we had exactly four candidates. So, we were lucky we filled all the positions required. We now have a full Board of seven members.

This raises a concern whether we will have enough interest from our homeowners to be able to fill a seven member HOA Board going forward. We discussed this with our HOA attorney, and she suggested considering reducing the size of the Board to five members. The Board is considering this option, but we currently feel seven is the correct number for Carolina Preserve. With seven Directors, the work of the Board is evenly spread out and no one is overloaded. With five Directors, some would have to take on extra responsibilities, which would further discourage homeowners to volunteer. Therefore, the Board has decided to keep the size of the Board at seven members and focus on recruiting new talent for the Board to maintain an optimal size.

During July/August this year, the Election Task Force will send out a request for candidate volunteers to fill three expiring Director positions on the Board. One existing Director does not plan to run again. Therefore, we need at least one new resident to run for the Board in 2021. We hope we will have four or more residents volunteer, so we can hold an election process with a true choice for the homeowners. However, if we do not get enough volunteers, the Board will need to meet again with our attorney and will likely need to reduce the size of the Board. Looking ahead to 2022 BOD elections there are two existing Directors not eligible to run again due to term limits. Meaning we need two additional volunteers to step up to run for the HOA Board in 2022.

I encourage residents to please consider volunteering to support our Carolina Preserve community by serving on the HOA Board, especially newer CP homeowners and those with prior HOA experience who can bring new perspectives to its work. Directors fill a vital role in a community with an excellent HOA such as Carolina Preserve. We share responsibilities, get a lot done and work great as a team.

In late spring, the Board will hold a webinar for the entire community that will explain how the Board functions, manages its finances, and incorporates our Strategic Plan initiatives. There will be lots of time for questions. So please keep an eye out for this webinar announcement, make your plans to attend and seriously consider running for election to the Carolina Preserve HOA Board of Directors.

# Strategic Plan Process in 2021



The currently published 2021 Strategic Plan provides the Board and the General Manager with more work and challenges than we can possibly address and complete over the next 24 plus months. In addition, we still have two large, active Task Forces, the large Tower project to manage and the pandemic crisis to manage. Based on this existing workload along with normal operations, the Board has decided not to conduct a Strategic Planning exercise during 2021. We will resume the process in 2022 during February and March.

The Board and GM encourage residents to send any Strategic Planning suggestions and ideas by email to the Board [HOA.Board@cpamberly.net](mailto:HOA.Board@cpamberly.net). If they can be incorporated into existing planned projects they will be considered. If not, they will be part of the 2022 Strategic Planning process.

## Serenity Park Mystery

Apparently there have been many rumors about the missing water fountains from Serenity park. The Board and GM just became aware of these rumors as a resident sent a question to the Board asking where they went. We thank the resident for the question and replied to the resident with the correct answer.

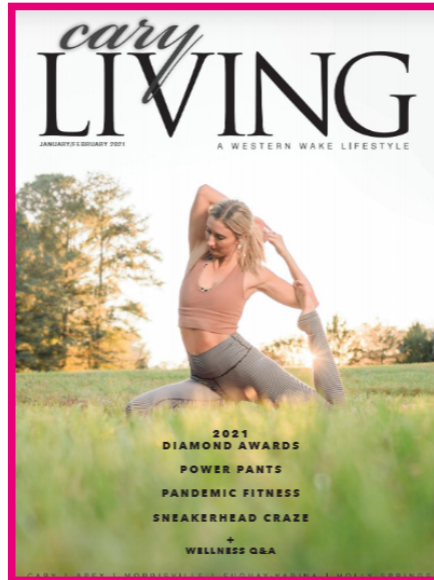
These fountains have water wells that are above ground and can freeze and by doing so, damage the well lining for the fountain. Therefore, the fountains are removed during the cold weather. They will reappear once Spring arrives.





# Cary Living Magazine 2021 Diamond Awards

They like us, they really, really like us!



In addition to winning the Cary Magazine Maggy Award noted in last month's HOA enewsletter, Carolina Preserve again wins accolades locally. In the Jan / Feb issue of the Cary Living Magazine we were voted Bronze under the Best Retirement Living category of the annual Diamond Awards. You can find the other local favorite businesses at [caryliving.com/diamond-awards-2021](https://caryliving.com/diamond-awards-2021)



# Fun & Fitness Pocket Park Update



It was brought to the Board's attention that during January a resident (using the message Board) stated issues they had with expectations surrounding the revitalization of the Fun & Fitness pocket park on Finnbar. Most of the Board do not read the message boards and there is a policy that Board members never respond to message board posts. But the revitalization of Finnbar pocket park was a substantial investment for Carolina Preserve. Therefore, the following is a summary of the decisions made, work planned and completed at the new Fun & Fitness park.

When we undertake projects like this park, we organize a task force and use the strategic plan notes for guidance as to what residents have requested to be added to our parks. We also must take Town of Cary limitations and requirements into account as we decide what we can and cannot do. After ten years of neglect this park was in the worst shape of any Carolina Preserve park with some spots unsafe for use, large erosion ruts ran down the middle of the park, dirt and mulch constantly washing onto the track, irrigation and lighting not working, dead landscape plantings, entrance concrete all pitted, cracked, etc. The Task Force examined all the problems within the park and came up with a theme and a vision on how to revitalize the park. This included multiple cost alternatives for the erosion and drainage issues and subsequent detailed plans to bring in color and some Fun & Fitness. They also solicited special assistance from the Beautification group to make everything happen. Christine Hast led the effort working with Harris Engineering to complete the work required within our budget addressing the erosion, drainage and irrigation issues.





Most of the irrigation in the park did not work or was broken. This had to be fixed before the new sod was installed. Harris Engineering filled in the ruts, addressed some drainage and resodded the entire area. This addressed the safety issues and made the park again usable. Robert Hamilton installed commercial edging around the entire track. This corrected the problem with dirt, mulch and pine straw spilling onto the track.

The Strategic Plan focus group discussions generate many requests from residents. As the Board and GM have undertaken the pocket park revitalization projects, we have tried to incorporate some of these requests into each park.

We added two Golf Frisbee stations to the park as there was adequate space for play. The much-criticized landscape and pitted concrete was addressed. The entrance has a new, attractive surface and has added some pop. On February 22, 2020, 13 members of the Beautification group laid out and planted 29 large evergreens at the front entrance to the Finnbar plus a few trees.

Besides digging holds over two dozen wheelbarrows of heavy clay had to be removed from the planting beds and replaced with good soil and fertilizer. Plus a few trees were planted. Finally, signage was installed for the park.



Thanks to the Beautification group, Carolina Preserve saved at least a couple thousand dollars with the landscaping enhancements. Still, the community has invested \$37,327 so far for this revitalization. There are three planned items not completed.

**1** Resurfacing the track. The track was cleaned up, but we decided to postpone the resurfacing until the community parking lots get resurfaced. This saves the community money.

**2** The Artscape planned for the park was put on hold because where we planned to install the art has an exceptionally large rock and we were unsure how to remove the rock or drill into it. Then came COVID-19 and all plans went on hold. Christine has recently created a plan with Hansley Landscaping to address the Artscape and surrounding landscaping.



The picture above shows the area in question. All the small stones will be removed, and soil put in to support a combination of flowering plants along with some Artscape. The discolored pavers will be sanded and painted.

Additionally, about a dozen or more rose bushes in the area are in extremely poor shape and will be removed and new plants installed.



3 A landscape plan for the park entrance has been completed and will move forward in the spring.

This was a lot of change to schedule and make happen with the funds available in 2019. The Task Force did a great job creating ideas around the park theme and researching solutions. Their efforts and contributions were fun and greatly appreciated. We cannot always accommodate every request but use our strategic plan as a guide when making these plans. When the Artscape is installed and landscaping completed we will show it in a future HOA monthly newsletter. Today the park looks great and is functional again. However, if residents would like to see other features for this park send an email to the board [HOA.Board@cpamberly.net](mailto:HOA.Board@cpamberly.net) and not the Message Boards.





# The Amberly Lake Fountain

*By Carole Katz, VP HOA Board & Amberly Liaison*

Many of you are wondering, what's with the Amberly fountain?

The Management of the lake and fountain is the responsibility of the Amberly Master Association under the direction of property manager Tom Reina, York Properties. Unfortunately, the repair process is a slow process, but another fix is in the works. Due to the sludge in the lake (and most lakes) breakdowns are all-too common. The last breakdown was in early December. It took a couple of weeks to get a thorough evaluation of the problem. A quote for repairs or replacement was received on December 31. The amount of the repairs required Amberly Master Board approval and the board did not meet until January 27, 2021. The Amberly Board has now authorized going ahead with the necessary rebuild and replacement of the power unit. About one month is required for shipping of the unit to and from, and about three weeks needed in the shop. The Amberly property manager is hoping to have the fountain fully operational again, by spring. It's just not a small thing.





# Open Working Board Meeting Open to Residents



CP HOA Board Open Working meetings are for the Board and General Manager to address and conduct the business of Carolina Preserve. This includes operational items, staffing, finance and budget items, strategic plan items, legal issues, association documents, COVID-19 issues, etc. Residents are welcome to attend these sessions as observers but cannot speak during these sessions as this time is for the Board members and GM. However, if residents have questions about an agenda item, they can ask their question using the chat feature on their screen during the meeting, or email their question to the Board, preferably before the meeting. Please remember that questions must be limited to the agenda items. If residents have questions on non-agenda items, please email them to the Board at

[HOA.Board@cpamberly.net](mailto:HOA.Board@cpamberly.net)

at any time, and they will be researched, and a response sent.

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Please register for HOA Open Working Board Meeting  
on Feb 16, 2021 10:15 AM EST at:

<https://attendee.gotowebinar.com/register/7750433686843029262>

After registering, you will receive a confirmation email containing information about joining the webinar.



# 2020 Financials at A Glance

## Operations (\$000)

Full Year			
	Actuals	Plan	B / (W) Plan
Income	\$3,976	\$4,027	(\$ 51)
Uses			
Reserves	\$ 517	\$ 505	(\$ 12)
Expenses	\$3249	\$3522	\$ 273
Net	\$210	\$0	\$ 210

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
12/31/2019	\$ 922	\$285	\$ 88	\$ 14	\$656
Contributions	\$ 412	\$ 47	\$ 33	\$ 25	\$ 0
Interest	\$ 15	\$ 4	\$ 0	\$ 0	\$ 0
Expenses	\$ 268	\$ 50	\$115	\$ 0	\$ 0
Transfer	\$ 0	\$ 0	\$ 80	\$ 0	\$ 80
BH Tower	\$ 143	\$ 0	\$ 0	\$ 0	\$ 0
2020 Surplus	\$ 0	\$ 0	\$ 0	\$ 0	\$210
12/31/2020	\$ 938	\$286	\$ 86	\$ 39	\$786

By Chet Sadosky, HOA Treasurer





# Treasurer's Comments

By Chet Sadosky, HOA Treasurer

The full year 2020 surplus is \$210k which will be added to our Operating Contingency. Key factors which drove this surplus are:

- \$91k: did not backfill both the Office Manager and Director of Operations vacant positions.
- \$42k: reduced front desk hours due to COVID
- \$16k: reduced Lifestyle expenses offset by lower Lifestyle income due to COVID
- \$50k: reduced Bradford Hall utilities due to COVID
- \$9k: greater resales (76 actual versus 70 plan) at a slightly higher rate (\$1310 versus \$1300)
- \$2k: there are both higher and lower expenses on all the other accounts for a small favorable impact

In summary, the closing Bradford Hall due to COVID resulted in a \$108k surplus alone. The GM's decision not to backfill two employees saved us an additional \$91k.

Villa expenses for 2020 were \$11k less than plan. As a result of this, we increased the Villa Reserve contribution by an equivalent \$11k to ensure that nothing of the Villa monthly assessment was used by the HOA.

Replacement reserves are higher than anticipated since we have only spent \$143k against the Replacement Reserve plan of \$250k on the Bradford Hall project. The remaining \$107k will be spent by the end of February.



# Key 2021 Financial Goals

By Chet Sadosky, HOA Treasurer

The key 2021 financial goals are as follows:

- The 2021 Operations plan is to have a \$52k surplus. Of that, \$40k will begin to pay back the Operating Contingency for the BH Tower project borrowed funds and the remaining \$12k will fund the 15% of assessment increase.
- The BH Tower project total cost is planned at \$640k which requires the borrowing of \$120k from the Operating Contingency as well as utilizing the 2019/20 surpluses.
- Replacement reserve contributions will be \$504k with planned expenses per the reserve study of \$581k (major items are two AC units and BMP remediation). Of course, we always hope no repairs or replacements are needed, but we are prepared.
- Villa reserve contributions will be \$11k with planned major irrigation system expenses of \$18k. The 2021 year end plan level of \$279k represents a very strong reserve position.
- Infrastructure Improvement Fund (IIF) contributions will be \$82k which, when combined with the current balance of \$86K, should cover the planned pavilion project, the pool area upgrade and completion of Arvada park.



# ARC Makes it Easy For You

*By Ken Merten, Architectural Review Committee*

ARC reviews and modifies the Design Guidelines annually in an effort to clarify confusing issues, as well as making them less restrictive where appropriate. While we try to “make it easier for you”, we also understand that for some in the community, they are still confusing and a bit overwhelming.

Nevertheless, ARC is frequently frustrated by the number of Modification Requests that are submitted that are missing essential information. Before ARC votes to approve MRs on the second and fourth Wednesdays of each month, we also meet on the preceding Fridays to identify MR shortcoming and assign ARC members to follow up with homeowners that have incomplete MRs. Actually, ARC receives the list of MRs from Robert Hamilton, Facilities Director, two days before the Friday meetings, so that each member of ARC can read through the MRs looking for problems. All this is quite time consuming. It is essential for the homeowners to take the time to read through the appropriate Guidelines that address their specific project, and then follow through with what is required (highlighted in RED) at the bottom of each Guideline.

We understand that some of the requirements may be difficult to achieve (photos and plot plans, etc.), but ARC would appreciate your best efforts. Occasionally, we make exceptions, but in some cases, there is no way to approve an MR without the required information.

ARC makes every effort to gather the missing information between our Friday and Wednesday meetings so that the homeowner does not have to wait another two weeks or more for the next review cycle. One option for ARC is to return the deficient MR to the homeowner and simply state that it is missing some of the requirements, and for the homeowner to resubmit the MR for the next review cycle, which will delay the project.

ARC appreciates your cooperation in this matter.





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# 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](mailto: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.**

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# Basic Exterior Housekeeping & Covenants

*By Christine Hast, General Manager  
& Robert Hamilton, Facilities Director*

When a new owner purchases their home, they sign an agreement that they will abide by and uphold the Carolina Preserve by Del Webb at Amberly HOA Protective Covenants and Restrictions recorded in the Office of the Wake and Chatham County Register of Deeds. They are obligated to maintain the exterior appearance of their home accordingly. Unfortunately, failure to do so results in violation letters, violation hearings and possible fines.

All owners have the duty to read through the covenants when they move in and every now and again, read them for a refresher. Where can you find the documents and policies for Carolina Preserve, you ask? They are right at your fingertips on the Carolina Preserve website.



See what owners are saying about reading our Governing Documents

- Awesome read! So much information!
- Who knew Governing Documents and Policies could be so interesting.
- Meeting minutes? So descriptive- It was like being in there in person!
- After reading the Design Guidelines and Covenants, I now fully understand my responsibility as a homeowner!
- Riveting! Stayed up all night reading-

Community Inspections are performed by Robert Hamilton a few times a week. Section by section, street by street. Violation letters are sent to owners.

We have compiled a list of the 12 most often seen violations along with the most complaints we receive from Realtors and your neighbors.

12. Their Realtor sign is in the grass by the sidewalk. Not in the mulch bed.
11. The hose is never put away. It is always laying all over their front lawn. No wonder the landscape people only mow half their lawn.
10. There are 7 bird feeders in their yard and they put food on the ground for the squirrels. I saw a rat!
9. Their decorative bricks around their street tree are falling all over the place.
8. They have 100 empty old flowerpots all over the place. And there are 10 lining the driveway filled with fake flowers.
7. There is a wheelbarrow stored on the side of their house next to a broken lawn chair.
6. They have a cluster of 17 bunny statues in their front mulch bed. I thought only three are allowed.
5. Their garage door is left open all day and night – Attached are the dates and times.
4. They have dead bushes and shrubs in every mulch bed. It's ugly and I am trying to sell my home.
3. They have had an almost dead street tree in their yard for three months.
2. The mailbox is rusted out and falling off the post. The post is leaning and is ready to fall.

#### AND THE #1 complaint: POWER WASHING

Their house is totally green with mold and mildew and needs power washed. It's disgusting. And by the way, there are homes on the street behind me that need power washed too.





What's the solution? How can all homeowners and community members help keep the appearance of community standards and maintain the value of homes?

Take a walk around the outside of your home. Assess it as others would see it.

Make a to-do list.

Call a power washing company now to schedule an appointment for right after the pollen stops. Power washing of homes, sidewalks and driveways can be done almost year-round in North Carolina – and have the whole house and eaves power washed. Not just the side that is green.

Remove old empty pots, things stored on the sides front and back of your house. Store them in your garage or put in your garbage for collection day.

Keep your garage door closed. It should only be open to exit and enter your home or if you are working in the yard. Leaving it open for all to see, is not a good look.

Two Bird feeders is enough. Never throw food on the ground. It attracts, rats, cats, coyote and other vermin that live in the natural wooded buffers.

Replace dead shrubs and trees – it's the owner's responsibility. When you purchased the lot and the house, you purchased every tree, shrub and blade of grass along with it.

Take a good look at your mailbox. Does the box need replaced, anchored better or just painted and new numbers. Is the post leaning? Can it be adjusted?

Take some time to review the Governing Documents, violation policies and design guidelines, be proactive in maintaining your home. It will save you aggravation down the road when you receive the violation letter.





# Mulch

*By Christine Hast, General Manager*



The week of January 25th some Board members along with the General Manager met with the Bland Landscape account manager to inspect the mulch selected for our community.

The mulch supplier and installers are different this year and are the same company that provides and installs the mulch at Governor's Ridge HOA.

It looks great! It is triple shredded hardwood mulch and install will begin the last week of January, the first week of February, weather permitting.

Bland will also spray for weeds in beds before installation. For an approximate date of when your section will have mulch installed, please read the Bland Landscape update sent out to the community on Fridays.



“To plant a garden  
is to believe in  
tomorrow”

*Audrey Hepburn*





# HOA Assessments for 2021

*By Christine Hast, General Manager*

I'm starting early this year – Assessment Accounts.

In reviewing the Assessment income for Carolina Preserve, there were quite a few accounts who forgot to add the \$5.00 increase in your January payment.

## The 2021 annual Assessments are:

- **Single Family Homes:**

Billing/Assessment Statement. **The 2021 annual assessment are: \$2,832.00 which is to be paid monthly in the amount of \$236.00 per month.**

- **Villa Homes:**

Billing /Assessment Statement. **The 2021 annual assessments are: \$3108.00 which is to be paid monthly in the amount of \$259.00 per month.**

If you pay through your bank, please contact them to ensure they are sending the correct amount.

If you send a check to the lock box, please make sure to submit the correct amount due.

If you have Auto draft through Kuester – sit back and relax, Kuester has made the change for you.

To sign up for Kuester Auto draft please click on this link and complete the form here:



If you have any questions about your account, please email me at [Christine@kuester.com](mailto:Christine@kuester.com). I can email you a copy of your current account ledger for your balance.

As a reminder, the auto draft option saves the HOA \$1.39 per month per owner to mail statements or monthly delinquency reminders.

## **Web-Site Registration**

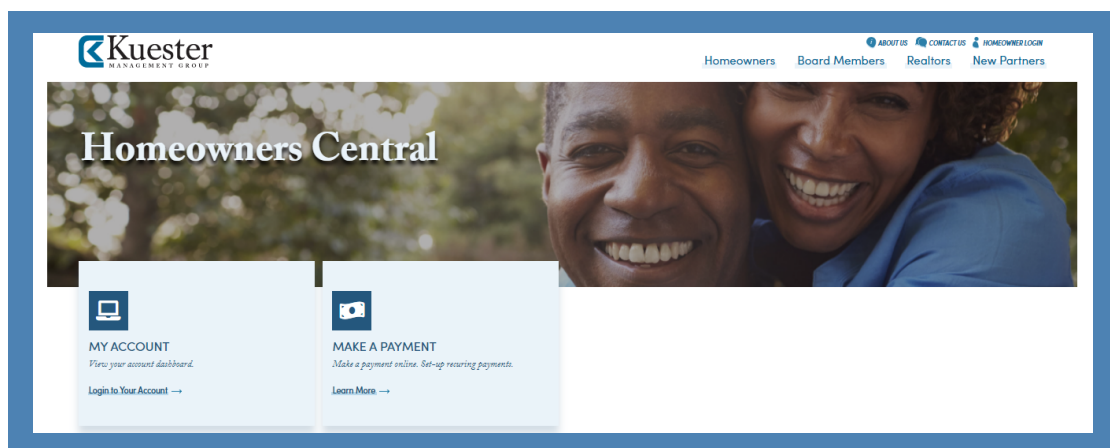
If you have not already done so, please take a few minutes to register your account on the Kuester website by visiting [www.kuester.com](http://www.kuester.com). To register, simply click the “Homeowner Login” tab located in the upper right corner of the screen and then click the brown “register” button in the right top hand corner of the screen that opens. Once your information has been validated in our system you will be able to access your account information online 24/7. By registering you will also ensure that you receive important community e-mails that the Board and Kuester periodically send out to the community regarding community events and news.

## **Questions/Concerns**

Email: [support@kuester.com](mailto:support@kuester.com)

Phone: (888) 600-5044

Business Hours: 8:30 am to 5:00 pm Monday through Thursday,  
8:30 am to 12:30 pm Friday





# CP's Got Talent

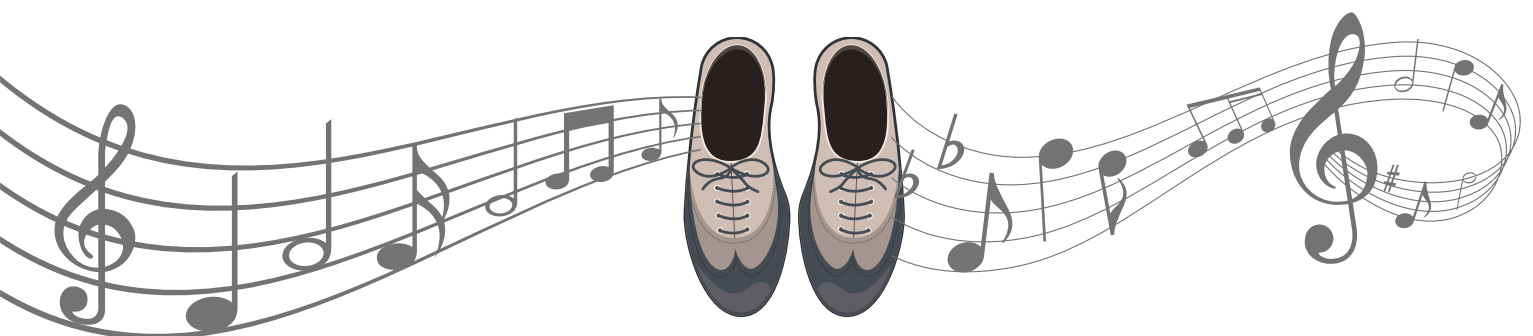
By Deborah K Badger, Lifestyle Director

Carolina Preserve has been fortunate enough to receive many accolades - local, regional and national - and now our CP Dance Company are in the final month of competing in a national talent contest, 2020 Seniors Got Talent!

You may vote once a day through February 28, 2021 to support our stellar dancers by going to the [Seniors Got Talent](#) website, selecting "Seniors Tap to Uptown Funk and Jailhouse Rock", entering your email address and hitting vote.



While CP Dancers will always be tops in our eyes, we would love for them to win in the group category so please vote, tell your friends and family, and let's finish up the contest in a strong position!



# 2021 Committees

## Architectural Review Advisory Committee

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

Board Liaison: John Siciliano | Staff Liaison: Robert Hamilton

## Club & Group Advisory Committee

Wanda Abel | Karen Baker | Vic Buenconsejo |  
Judith Dorezas | Joel Glassman | Cynthia Jackson |  
Linda Laurich | Marie Millazzo | Paulette Shekell

Board Liaison: Robert Griffith | Staff Liaison: Mary Gallagher, Deborah Badger

## Finance Advisory Committee

Melva Brown | Kathy McCone Dunn | Steve Harrison |  
Dennis Hefner | Bill Lazcano | Paul Wolf

Board Liaison: Chet Sadosky | Staff Liaison: Christine Hast

## Information Technology Advisory Committee

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

Board Liaison: Margaret Horst | Staff Liaison: Mary Gallagher, Deborah Badger

## Lifestyle Advisory Committee

Dennis Curtin | Jeff Diton | Cathy Gottesman |  
Glenn Hains | Genie Lazcano | Antonia Pinckney |  
Sharon Valvona | Lynnette Womble

Board Liaison: Jill Poston | Staff Liaison: Deborah Badger

# 2021 Board

Tom Crotty  
President

Carole Katz  
Vice President

Margaret Horst  
Secretary

Chet Sadosky  
Treasurer

Robert Griffith  
Member at Large

John Siciliano  
Member at Large

Jill Poston  
Member at Large

# Mark Your Calendar

HOA Board Meeting  
February 16 | 10:15am

Community Board Meeting  
March 8 | 6:30pm

HOA Board Meeting  
March 16 | 10:15am



All meetings are held online  
via GoToWebinar