

JANUARY 2021 ISSUE XIV

CAROLINA PRESERVE

HOA NEWS

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CARY MAGAZINE 2021 MAGGY AWARD

Best Active Adult Community
Honorable Mention





HOA President's Comments

by Tom Crotty



Happy New Year everyone! Let us hope in 2021 we all stay healthy, the vaccine gets distributed, and we return to some sense of normalcy.

The Board's first meeting was on January 4th. This is when the new 2021 Board officially is seated, and officers are elected. This is also when the Board's attorney, Hope Carmichael, from Jordon Price, joins us for our meeting. Hope will address several legal questions and advise the Board on several legislative and COVID-19 issues.

At the top of our agenda is developing a strategy for when the COVID-19 vaccine becomes available to Carolina Preserve residents and staff.

The Board and General Manager are developing plans for when a vaccine becomes available and how and when we might be able to reopen more of Bradford Hall. This will all depend on CDC and Governor Cooper's executive orders and advice from our attorney.

The Board, working with the Club & Group Advisory Committee, will plan a strategy for startup of club and group functions to hopefully happen later in 2021. Part of this will involve scheduling meetings with club and group leaders at some point to discuss how to restart events and get their input.

A quick look at other significant projects for the year ahead.

- The Bradford Hall Tower project will finish in the first half of 2021. We will clean up after the project and get everything looking good for Spring.
- The outdoor pool makeover must finish before the pool is scheduled to open. Details about the makeover are in this newsletter.
- The helipad project to construct a pavilion over the concrete pad behind the pool will hopefully finish by early Summer. It will be driven by Town of Cary permit approvals. Full details are in this newsletter.
- The Arvada Park swings, corn toss game and shuffleboard courts will be installed early Spring.
- Landscaping improvements are scheduled all around Bradford Hall both in the Spring and Fall.
- Look again for lots of color (daffodils and tulips) in Spring thanks to the Beautification Group.

It is going to be another busy and challenging year and the Board and GM ask for your patience as we navigate these challenges. Our priority remains the health and safety of our residence and staff.

Stay Safe and Healthy

Tom Crotty



The Carolina Preserve 2021 Board Officers and Advisory Committee Liaisons

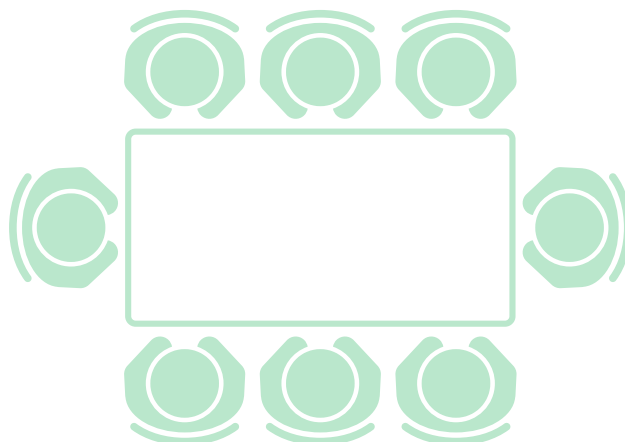
As is tradition the Carolina Preserve Board and General Manager met on the first workday of the new year, January 4th, to elect new Board officers and elect board liaisons for each of our Board appointed advisory committees. Please thank these residents for their time and efforts if and when you encounter them.

o Election of officers for 2021

- President Tom Crotty
- Vice President Carole Katz
- Treasurer Chet Sadosky
- Secretary Margaret Horst

o Selection of Board Liaisons for 2021

- Kuester Liaison – By default always the President
- Finance Advisory Committee – Chet Sadosky
- ARC Advisory Committee – John Siciliano
- IT Advisory Committee – Margaret Horst
- Lifestyle Advisory Committee – Jill Poston
- Club/Group Advisory Committee – Robert Griffith
- Amberly BOD – Carole Katz



Introducing Carolina Preserve's 2021 Committee Members

Carolina Preserve has five standing advisory committees that serve at the pleasure of the Board in direct support of the Strategic Plan and our Community. Committee members volunteer to serve for a one year commitment. They bring a wealth of talent, experiences and varied interests with a shared commitment to serve our community. Their efforts contribute significantly to maintaining Carolina Preserve as a Community of Excellence. We thank them in advance! Committee charters and contact information will be available in the near future, on the CP website under "Governance", "Committees and Task Forces".

Architecture Review Advisory Committee (ARC)

- John Siciliano (Board Liaison)
- John Bongino
- Ken Merten
- Steven Botha
- Elizabeth Diton
- Csaba Dosa
- Claire Hammitt
- MaryJane Slusser
- Robert Hamilton (Staff Liaison)

Club and Group Advisory Committee (CGAC)

- Robert Griffith (Board Liaison)
- Paulette Shekell
- Karen Baker
- Joel Glassman
- Linda Laurich
- Judy Dorezas
- Vic Buenconsejo
- Cynthia Jackson
- Wanda Abel
- Marie Millazzo
- Mary Gallagher, Deborah Badger (Staff Liaisons)

Finance Advisory Committee (FC)

- Chet Sadosky (Board Liaison)
- Kathy McCone Dunn
- Bill Lazcano
- Dennis Hefner
- Melva Brown
- Steve Harrison
- Paul Wolf
- Christine Hast (Staff Liaison)

Information Technology Advisory Committee (ITC)

- Margaret Horst (Board Liaison)
- Amy Levine
- Bob Willenberg
- Dennis Curtin
- Jean Curtin
- Jay Stolzenhaler
- Mel Kosmin
- Mary Gallagher, Deborah Badger (Staff Liaisons)

Lifestyle Advisory Committee (LAC)

- Jill Poston (Board Liaison)
- Dennis Curtin
- Jeff Diton
- Cathy Gottesman
- Glenn Hains
- Genie Lazcano
- Antonia Pinckney
- Sharon Valvona
- Lynnette Womble
- Deborah Badger (Staff Liaison)

Amberly Board of Directors (CP Liaison) – Carole Katz

Although 2021 Committee positions have been filled, vacancies as well as occasional calls for assistance do open up periodically. We welcome volunteer interest throughout the year. If you have interests, we encourage you to complete a non-committal volunteer form that is maintained and searched by the Board and GM as needs arise. The form can be found on the website; click Governance, then Committees and Task forces. See the “volunteer form” near the top of the page. Or click the “You Can Make it Happen” link below:



Applications are maintained for two years. In addition to future interest on a Board Committee, you can indicate interest in “Future Task Forces” which are shorter term commitments for specific projects that emerge on an ongoing basis. The volunteer form also enables you to express interest in serving on the 2022 through 2023 Board of Directors. Carolina Preserve needs you!

Strategic Plan Initiatives for Areas Behind Bradford Hall

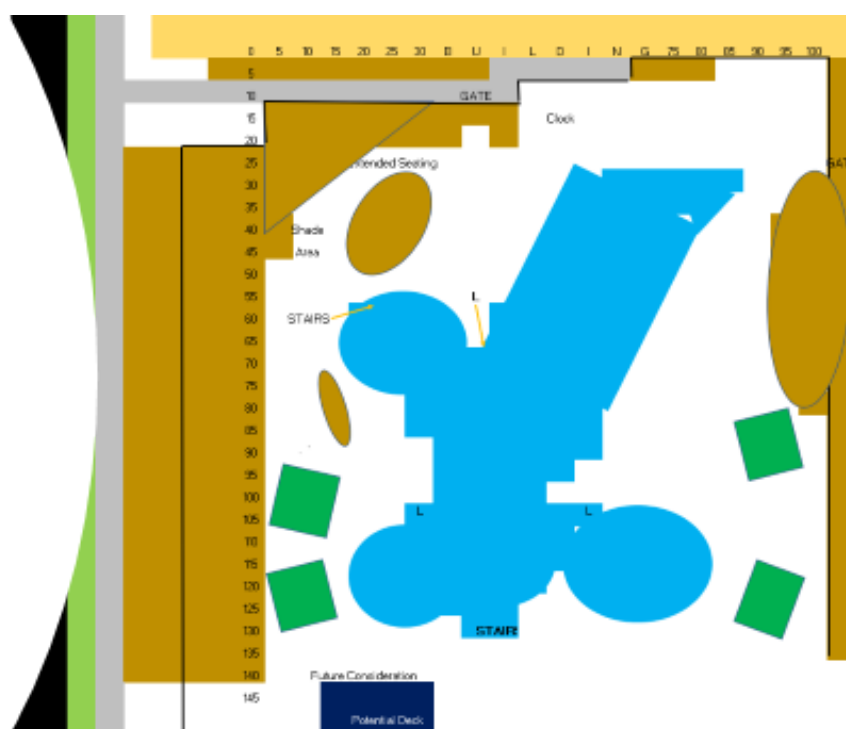
The major initiatives from our 2020 Strategic Plan update were to address the aging areas and conditions around and behind Bradford Hall. In the December HOA Newsletter the Board announced a Task Force was started in late September to tackle these areas. They identified the first two areas to address are the pool and the concrete pad area. They researched multiple options and associated costs and presented their recommendations to the Board and GM at our December 15th Board meeting. After discussions of each project the Board approved the plans and funding to complete these projects.

What Changes are about to Happen?

The task force focused on the pool and the concrete pad projects first because we need these projects completed by early Spring (pool) to early Summer. Also, by moving before year end, the task force took advantage of discounts, free shipping and avoided price hikes due to take effect 2021. These saving amounted to thousands of dollars.

Discovery and Pool Plans

The pool area's overall landscape is in very poor condition. Many plants missing (died over the years) and others overgrown or looking very poorly. The Task Force working with Mike Farrell, Hansley Landscaping, developed a multi-phase plan to redo the entire pool area starting in January 2021. Several of the plants removed from the pool area will actually be planted elsewhere around Bradford Hall.



The Task Force created plans to expand the seating area within the existing pool space. Furniture was ordered by end of 2020 which avoids January 2021 price hikes plus saved thousands of dollars with negotiated discounts and no shipping charges. Cost of most furniture comes from Reserves. A new Shade Walk is planned that will provide shade for most if not all of the 10 tables and chairs. Here are the details:

- The 15 side chairs around the pool will be replaced along with the 15 side tables.
- The eight heavy metal tables and chairs will be replaced with eight new tables and 32 side chairs.
- Two new tables and eight chairs will be purchased for the extended area.
- The existing six shade walks (green covering) will have their tarps replaced.
- Add a clock.
- Fix the air jets in the pool.
- In addition, 6-10 umbrellas will be setup providing additional shade by the pool.
- The 10 tables and chairs will become a shaded area.

Timeline to complete - End of April

Helipad or Concrete Area



Photo Credit: Oscar Esperanza

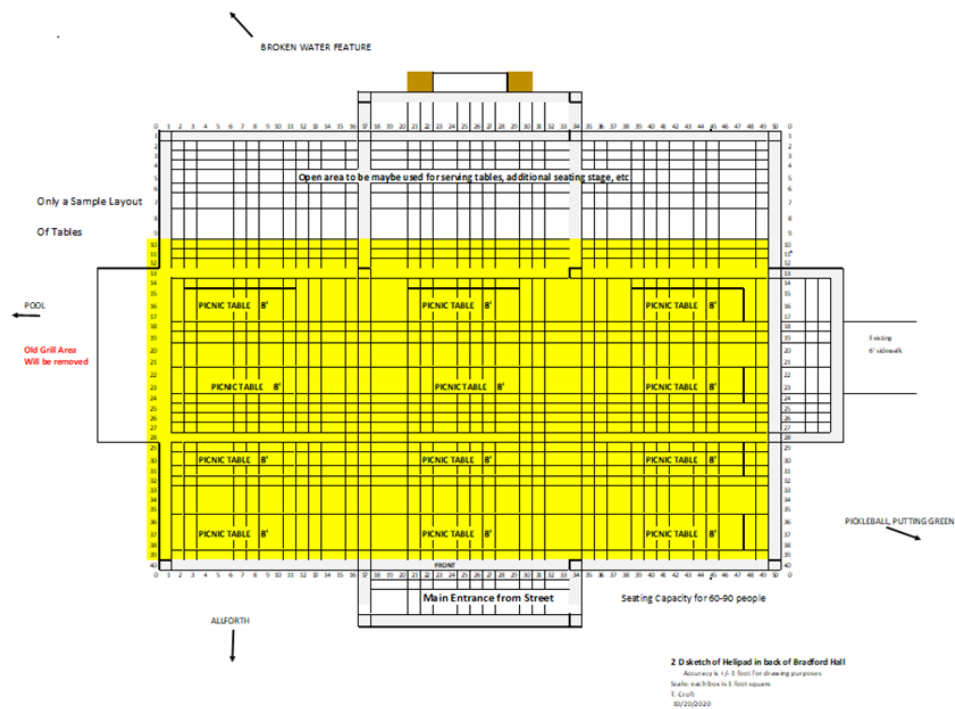
The landscape in this area is in poor condition and a new landscape plan is under development. With the only outdoor structure being the small but very popular pavilion at Arvada, the team unanimously felt that the Helipad area would benefit most with a pavilion structure. This would allow a significant area for residents to gather outdoors and even clubs and groups to hold events. We ideally wanted a structure to support 70 - 90 people.

- Many questions had to be researched and answered to arrive at the best structure.
- How to determine maximum size and height of the structure.
- Maximum seating area.
- Wanted structure to somehow match Bradford Hall color, ornamentation, etc.
- Type of roof and color to match Bradford Hall.
- Curb side aesthetic appeal from Allforth Place.
- What to do with old broken BBQ area.
- Decided on electricity for lights and fans.
- Had to avoid existing drainage lines.
- Must make plans to meet Town of Cary permitting requirements.
- Decided on stonework around columns to match existing .
- Do not want any middle support columns .
- How construction staging would be handled.
- And many more issues and challenges.

Below is the structure selected by the Task Force



Below is a diagram of how the Pavilion will sit in the existing concrete pad. The yellow area shows the area planned to be covered.



This Pavilion is made by Classic Recreations and this is the MESA model and is the recommendation from the task force. Below are the details of the structure:

- Structure will be 50' X 30' X 9" high
- Allows 12 eight-foot picnic tables or seating for 80 + people, additional tables are possible
- Standing seam roof chosen to match existing Bradford Hall pool roof and color
- Dormer will have custom ornamentation matching Bradford Hall exterior.
- Stonework will be added around some or all columns
- Electrician will wire structure for lights and fans
- The Task Force considered both new construction and other pre-designed models. They received at least five quotes from multiple vendors. New construction was the costliest and required the most permitting and length of time to build. The Classic Recreation model chosen, and the local NC company PlayWorld Preferred provided strong confidence in design and installation expertise. The design selected accomplishes the appearance to best match Bradford Hall, provide the seating area needed and best fits our budget.

Note – The unknown with these projects is working with Town of Cary and forecasting the timing for permit approvals.

Cost and funding for the Pool and Concrete Helipad recommendations

- Funds will come from Reserves for most of the furniture, etc.
- Funds will come from the Landscape Special Projects Budget
- Funds will be needed from the IIF for capital improvements. See the Treasurer's article in this issue for how these projects will be funded

The Bradford Hall Backyard Task Force work is not complete with just these two projects. The Task Force will continue with their mission. They still must address the broken fountain, landscape issues and other areas around Bradford Hall. But their focus will remain in the near term on the initial projects started until they are completed.

Resident Questions and Answers from the December 22 Community Meeting via GoToWebinar regarding the Planned Pool and Pavilion Projects:

1. Will the current concrete pad be retained, added to, or completely tore out and replaced for the pavilion?
 - Plans are to keep the existing concrete pad and build on top of it.
2. Will an irrigation system be in place for the new landscaping and who will be responsible for maintaining the new plants?
 - The Bradford Hall landscape is maintained by Hansley's Landscaping (effective August 10, 2020.) The task force has worked with Hansley's to create a new landscape plan. All the work will be done by Hansley's Landscaping and they will maintain it. There is some irrigation in place. This will be repaired and made operation again but no additional irrigation is planned.
3. Are there any plans for the fountain area?
 - The pool area and the pavilion are just the first two projects the task force will undertake. There is still much more work for the task force to complete. These are only the initial two projects. Once these projects get well underway, they will move onto other areas like the broken fountain.
4. Does this mean we will not be able to spend any further capital spending until 2023?
 - No. There are still unspent funds left in the Infrastructure Improvement Fund. When the task force has time to move onto other projects and presents proposals to the Board, the Board and GM will determine if the funds available are sufficient.

5. What is the timing of these two projects?

- The pool area changes must be completed before the pool opens May 1, 2021. The pavilion structure requires a 16-18 week build time. But building will not proceed until all the permits have been approved by Town of Cary. Historically approvals have taken awhile.

6. Parking near the tennis courts is very limited with the addition of the pickle ball courts. With the new pavilion (which I like), people attending events will want to park in that lot because it's closer. Again, putting more stress on that tennis lot.

- Carolina Preserve (CP) only has two parking lots, both on Allforth Place. One in front of Bradford Hall and the other down by the Greenway. For many years the lot by the Greenway was primarily used by tennis players and residents using the Greenway. Unfortunately, there is no land to expand our parking facilities. We have tried. The open land that exists are buffer areas required by Town of Cary and for drainage purposes. Therefore, everyone will need to learn to share the parking available. There are also bike racks by the Tennis courts and by the Pickleball courts.

7. That leads to my additional concern. How will people with disabilities get to the pavilion if they have to park in the Bradford Hall lot?

- People with disabilities wanting to use the new Pavilion can be dropped off on Allforth, but no parking along the street of Allforth (Cary police have ticketed cars in the past for illegal parking). Cars will need to park at one of the two CP parking lots. There is a handicapped ramp on the side of Bradford Hall over by the dumpster that leads all the way down to the pavilion area. There will also be guidelines and regulations added to the Facility Use Manual.



Board Open Working Meetings Open to Residents



The Board has now licensed the GoToWebinar software from [LogMeIn](#) to use for our Community meetings, Board Open Working Meetings, Annual meeting, Budget reviews, Board elections, etc. until we can have face-to-face meetings again. If you attended the 2020 Annual Meeting or any Carolina Preserve Community Meetings online in 2020, you have already used this software. It works on any computer or tablet with Wi-Fi connection and does not require you to install any software.

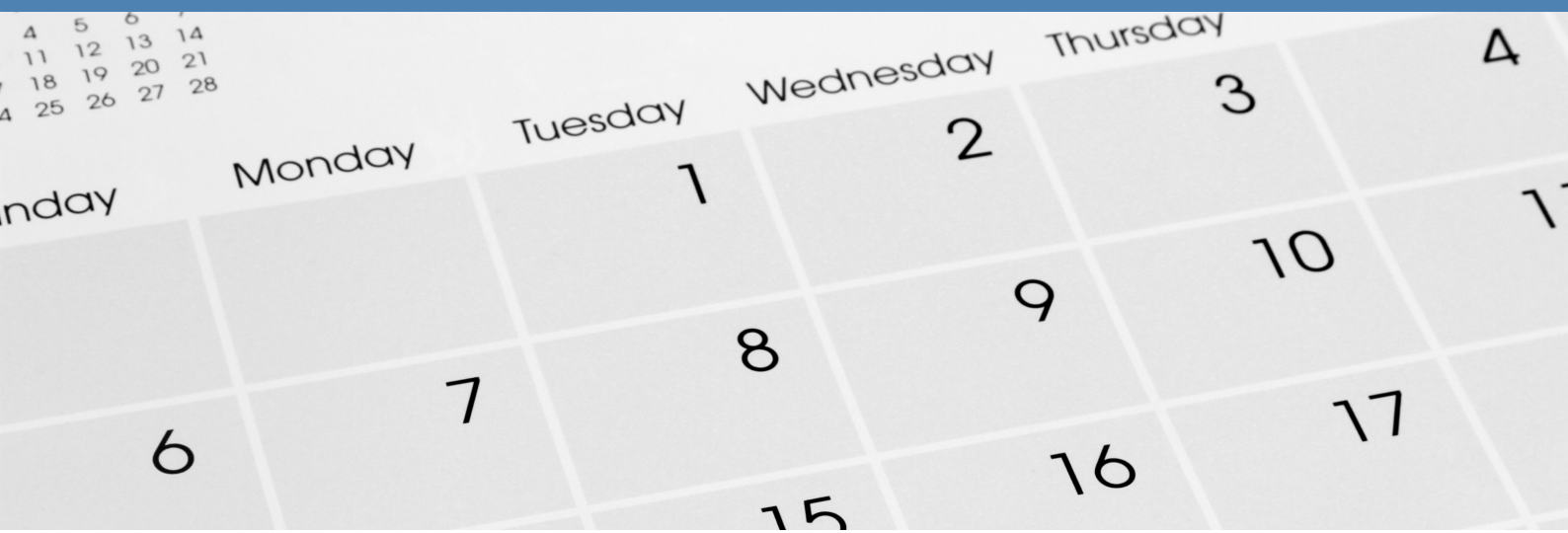
In 2020, we used GoToWebinar thanks to the generosity of our HOA attorney, Hope Carmichael of Jordan Price, so we could see how it worked and evaluate it for CP HOA use. We have now purchased three licenses for the software, and we will continue to use it in 2021. These licenses are for use by the Board, Board Advisory Committees and Kuester staff.

By having three licenses for the software, we will be able to make it available to HOA committees for their use, as well as using it for Lifestyle events and HOA meetings.

The next Board Open Working meeting, scheduled for January 19, 2021 at 10 am, will be open for residents to attend using GoToWebinar. Registration will be required to attend this and all CP online webinars. An email with registration link will be sent a week ahead of the scheduled meeting date. Once you have registered for the meeting, you will be sent a link to join the meeting at its scheduled time.

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





2021 HOA Board & Quarterly Community Meeting Dates

Tuesday, January 19, 2021	10:15am	Open Working Board Meeting
Tuesday, February 16, 2021	10:15am	Open Working Board Meeting
Monday, March 8, 2021	6:30pm	Community Board Meeting
Tuesday, March 16, 2021	10:15am	Open Working Board Meeting
Tuesday, April 20, 2021	10:15am	Open Working Board Meeting
Tuesday, May 18, 2021	10:15am	Open Working Board Meeting
Monday, June 14, 2021	6:30pm	Community Board Meeting
Tuesday, June 15, 2021	10:15am	Open Working Board Meeting
Tuesday, July 20, 2021	10:15am	Open Working Board Meeting
Tuesday, August 17, 2021	10:15am	Open Working Board Meeting
Monday, September 13, 2021	6:30pm	Community Board Meeting
Tuesday, September 21, 2021	10:15am	Open Working Board Meeting
Tuesday, October 19, 2021	10:15am	Open Working Board Meeting
Tuesday, November 16, 2021	6:30pm	Annual Meeting
Tuesday, December 21, 2021	10:15am	Open Working Board Meeting

Carolina Preserve is All About Volunteering—And We Thank YOU!

By Carole Katz & Tom Crotty

Volunteering allows you to connect to your community and make it a better place. In 2020, not because of COVID, but in spite of COVID, Carolina Preserve (CP) residents came out by the hundreds (literally) to volunteer for an untold number of committees, task forces and other opportunities, all contributing to a better community. CP is a recognized “Community of Excellence” and once again our residents continue to reinforce how deserving we are of that accolade. On behalf of the HOA Board, Kuester staff, and I’ll add your fellow residents, for whom your efforts didn’t go unnoticed, **Thank You!**

Let’s continue the spirit in 2021. If you haven’t completed a volunteer form and may have interests for 2021, get yourself into the database. Committees for 2021 are already filled but openings come about periodically. Task forces and calls for other volunteers manifest themselves throughout the year. To submit a form, go to the CP website, under Governance, click Committees and Task Forces and see the “volunteer form” near the top. Or click the link below:



Your submission is non committal but helps provide an important source of potential volunteers as opportunities arise.

Additionally, it’s not too soon to think about joining the CP Board of Directors for the 2022-2023 term. Candidates will be sought in late Summer with elections in November. Complete the volunteer form mentioned above, to express your interest, and any relevant experience, for the HOA Board.

The Board welcomes your expression of interest or questions at any time (HOA.board@cpamberly.net).



THANK YOU 2020 VOLUNTEERS!

Special Recognition-The Board and General Manager owe many thanks to an army of volunteers that without their time and efforts many, many things which benefit the community at large, would not have been accomplished this year.

Task Forces:

Tower Task Force - Henry (Bill) Giles, Stewart Abel, Rick Challenger, Tom Croft, John Siciliano

Pickleball Task Force, creation of new Club and Training classes – Jim Hutchinson, Joann Gott, Debbie Merten, Alan Roitman, Eileen Hutchinson, John Siciliano

Arvada Park Task Force – Denise Allmond, Debbie Merten, Helaine Turek, Eileen Hutchinson. Tom Crotty

Serenity and Fun and Fitness Parks Task Force - Bob Willenberg, Sandy Rusk, Kathleen Casner, Denise Almond, Barbara Weiss, Ginny Basik, Burt Katz

Sidewalk Task Force - Jim Giles for his ongoing coordination with the Town of Cary and:

Section 1- Volunteers

Claire & Ed Hammitt
Mark Patterson
Leslie Fingerhut
Ellie & Dennis Sesler
Deb Walvoord
David Steifford
Alan Levine
Michael Field
Barger Jeutter
Thomas Griffin
Judy Hasse
Bill & Mary Pierce
Marg Dickson

Section 2- Volunteers

Carol Gorman
Vic Buenconsejo
Marsha Drillings
Jan Orey
Ron Madl
Linda Maier
Carol Randall
Marty Atwater
Lynnette & David Womble

Section 3- Volunteers

Yvonne Gardener
Roberta Alter
Judy Smith
David Jackson
Allen Barnett
Maria Russo
Hank Cullen
Maureen Goodwin
Maggie Barrett

*Thank
you*

Section 4- Volunteers

Jeff & Cathy Gottesman
Barbara Graul
Mary Proctor
Joan Harshbarger
Janet Farrell
Henry Giles
Debbie Merten
Bob Willenberg
Jack McCann

Section 5- Volunteers

Darlene Wuthrich
Janice Overman
Linda Laurich
Jerri West
Alora Burton
Joe Tikvart
Barbara Goldberg
Judy Rampolla
Ann Pipinski
Debby Gold



Bradford Hall Backyard Task Force – Arlene Frederick, Sharon Bollini, Lynn Borman, David Jackson, Debbie Merten, Tom Croft, Tom Crotty

HOA Board Committees:

Architectural Review Committee (ARC) – John Bongino- Co Chair, Ken Merten- Co Chair, Steven Botha, Elizabeth Diton, Casba Dosa, Claire Hammitt, Maryjane Slusser (Burt Katz- Board Liaison)

Club/Group Advisory Committee (CGAC)– Paulette Shekell- Co Chair, Karen Baker- Co Chair, Larry Brown, Linda Laurich, Joel Glassman -Secretary, Judy Dorezas (Robert Griffith- Board Liaison)

Finance Advisory Committee – Melva Brown, Bill Lazcano, Eugene Harshbarger, Paul Wolf – Chair, Kathleen McCone-Dunn, Dennis Hefner (Chet Sadosky- Board Liaison)

Information Technology Committee –Jean Curtin, Jeffery Diton, Mel Kosmin, Dennis Curtin, Amy Levine - Secretary, John Stolzenhaler, Robert Willenberg (Margaret Horst, Board Liaison)

Lifestyle Advisory Committee (LAC)– Carol Randall - Chair, David Baker – Vice Chair, Jill Poston - Secretary, Lynnette Womble, Dennis Curtin, Judy Rampolla, Glenn Hains, Sandra Rusk (Carole Katz- Board Liaison)

Thank you to the numerous other volunteers who supported committees and other CP initiatives including:

The Adopt a Spot Group

The Beautification Group

CP's Community Emergency Response Team (CERT)

Neighborhood Watch Block and Area Captains

Thriving in Place Members

The numerous charitable groups including **CP Cares** and many **CP Clubs and Groups**,

Participants in the annual **Strategic Planning Process' Focus Groups**

Club and Group leaders for your flexibility in vendor negotiations, etc. and creatively seeking opportunities to engage your membership during these challenging times

"CP Connections" leaders and contributors—and welcome to CP's new digital magazine

Parade organizers, singers, dancers, and other entertainers

New Resident Orientation Welcome (NROW) support team and Ambassadors

CP University (CPU) Class Coordinators

Field Day volunteers and those who loaned their personal equipment

.... and on and on. So many deserving of mention! Hopefully we didn't leave anyone out. You are Carolina Preserve. You are ALL so appreciated.

With Great Appreciation,
Your (Volunteer) HOA Board and Kuester Management.



2020 Financials at A Glance

Operations (\$000)

	November YTD		Full Year	
	Actuals	B/(W) Plan	Plan	Forecast
Income	\$3,648	(\$ 48)	\$4,027	\$3,970 - \$3,975
Uses				
Reserves	\$ 472	(\$ 24)	\$505	\$ 515 - \$ 517
Expenses	\$2,969	\$ 288	\$3522	\$3,225 - \$3,235
Net	\$ 207	\$ 216	\$0	\$218 - \$235

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	\$ 380	\$ 41	\$ 33	\$ 18	\$ 0
Interest	\$ 15	\$ 4	\$ 0	\$ 0	\$ 0
Expenses	\$ 172	\$ 49	\$115	\$ 0	\$ 0
Transfer	\$ 0	\$ 0	\$ 20	\$ 0	\$ 20
Tower	\$ 47	\$ 0	\$ 0	\$ 0	\$ 0
11/30/20	\$1,098	\$281	\$ 26	\$ 32	\$636

By Chet Sadosky, HOA Treasurer

The November year to date net income/expenses has a surplus of \$207k and our full year forecast continues to be a surplus of approximately \$220k - \$235k as we have been reporting over the past number of months.

Spending on the BH Tower project will primarily be in the 1st quarter of 2021 which means that the year end balances for Replacement Reserves and Operating Contingency will be greater than originally anticipated. Villa reserves at year end are forecasted to be at the same level as year end 2019.

Plan to Restore the Operating Contingency

By Chet Sadosky, HOA Treasurer

Both the Pavilion project and the BH Tower project require borrowing from the Operating Contingency. The Board wants the community to understand how the Operating Contingency will be repaid to get back to the 15% of assessments goal by the end of 2023.

The following chart shows the planned track of the Operating Contingency from 2020 through 2023:

Operating Contingency				
	2020	2021	2022	2023
Monthly assessment	\$231/mon	\$236/mon	\$240/mon	\$244/mon
15% goal	<u>\$565,000</u>	<u>\$578,000</u>	<u>\$588,000</u>	<u>\$598,000</u>
Yearly track (\$000)				
Beginning balance	<u>\$656</u>	<u>\$796</u>	<u>\$458</u>	<u>\$548</u>
Transfer of surplus				
IIF Arvada	\$20	\$0	\$0	\$0
IIF Pavilion	\$20	\$0	\$0	\$0
Tower	<u>\$0</u>	<u>\$270</u>	<u>\$0</u>	<u>\$0</u>
Subtotal	<u>\$40</u>	<u>\$270</u>	<u>\$0</u>	<u>\$0</u>
Borrow from Op Cont.				
IIF Pavilion	\$40	\$0	\$0	\$0
Tower	<u>\$0</u>	<u>\$120</u>	<u>\$0</u>	<u>\$0</u>
Subtotal	<u>\$40</u>	<u>\$120</u>	<u>\$0</u>	<u>\$0</u>
Additions				
2020 Surplus	\$220			
Borrowing payback		\$40	\$80	\$40
15% assessment increase		<u>\$12</u>	<u>\$10</u>	<u>\$10</u>
Subtotal	<u>\$220</u>	<u>\$52</u>	<u>\$90</u>	<u>\$52</u>
Ending balance	<u>\$796</u>	<u>\$458</u>	<u>\$548</u>	<u>\$598</u>

We began 2020 with an Operating Contingency balance of \$656k which included the 2018/19 surplus of \$91k. In 2020, we have transferred \$40k of the surplus to the Infrastructure Improvement Fund (IIF) for the Arvada and Pavilion projects as well as having borrowed \$40k for the Pavilion project.

Funding for the BH Tower project as previously presented will utilize \$270k of 2018/19/20 surpluses and will require borrowing \$120k. The 2021-2023 budget showed a payback of \$40k each year. The IIF borrowing for the Pavilion will be paid back in 2022 by reducing the amount of planned 2022 IIF reserve contributions from \$82k to \$42k.

Please remember that the Operating Contingency is funded by having a budget surplus (more income than expenses in a given year).

Pickleball Update

By Jim Hutchinson, Pickleball Task Force



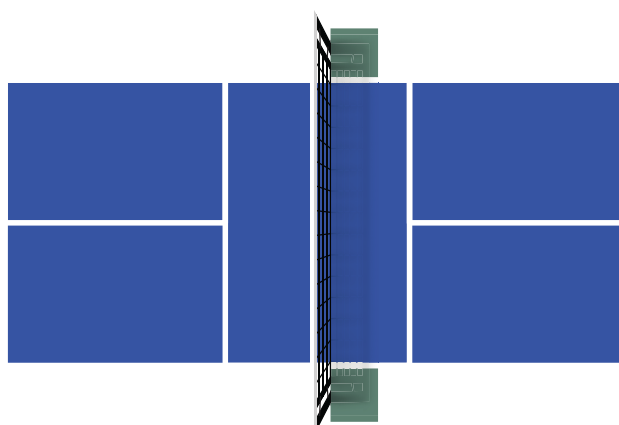
Our new pickleball courts have been open almost five months and I thought it might be useful to provide members of the Pickleball Task Force and the community update on the court's usage. Some of the objectives for the courts that were either explicitly stated in the charter / guidelines or implied via discussions are:

- Create an environment where many the residents participate in the group.
- Maximize usage of the courts across the widest cross section of the community.
- Ensure that players of all levels of play feel comfortable and enjoy themselves.
- Achieve participation among women in the community that is in line with the pickleball national average of 40%.

Below is a brief status of where we stand against these objectives:

- Group membership is at 193 and we continue to add new members.
- The court usage since the cooler weather set in has consistently been running above 70% and some weeks has exceeded 80%.
- There have been at least 120 members of the community that have used the courts at least once.
- There have been over 50 people that have used the courts that never played pickleball before the courts were built.
- 47% of the members of the pickleball group are women. Although an exact percentage of players is difficult to determine, observing courts reservations and participation in the women and beginners open times indicates that the 40% goal is being achieved.

Although we did not have specific numerical goals established for each of these objectives, I believe it is safe to say that everyone's expectations have been met or exceeded. Thanks go to Christine Hast, Robert Hamilton and the Board for their perseverance with the Town of Cary to get the courts built.



Arvada Task Force Update

The following planned purchases were made, and, in most cases, these have long lead times and we are still awaiting shipment.

1. The Artscape items were purchased and installed within the park.
2. The two Shuffleboard VERSACOURTS just arrived. These will be installed by late winter 2021.
3. The concrete Corn Toss game is on order awaiting shipment .
4. The two Forever Redwood Swings have a 12 week build and order lead time. We expect delivery in March 2021.
5. The Par Sign will ship after the holidays.

No further changes to Arvada Park are planned until late winter.



The Gathering Place

Welcome, New 2020 Residents & Introducing an Updated Website Tutorial for All Residents

By Lynnette Womble, Lifestyle Advisory Committee

Since 2018, an ongoing project of the Lifestyle Advisory Committee (LAC) has been the offering of revised New Resident Orientation Workshops (NROW) on a quarterly basis. This is a program by residents for residents, reinforcing Carolina Preserve (CP) as a volunteer-centric community. However, only the February session was held in 2020 before COVID-19 intervened.

A temporary substitute for the in-person group presentations was created, assembling a group of eleven ambassador volunteers to contact new residents. A list of new residents is supplied by our Kuester management team monthly, based on closing information and new rental information. December data will not be available until January 5th or 6th, but through November, there have been almost 75 contacts made to new owners, new renters, and former renters who have become owners.

The first contact is made by phone, with a personal welcome to the community. This is followed by an email with an attachment containing links to Kuester management team contacts, the CP website, and a tutorial video featuring some of the functions and features of the website.

In December the original video, created this past summer, was replaced with an updated version demonstrating the newest version of the website rolled out on December 1st. The updated video has been posted on the CP website as a reference for all residents. It can be found under the "Help" dropdown on the blue bar of the home page, or click the link below.



The CP website is the lifeline to our community. We hope all residents will check it out; you just may find something new and helpful!

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.



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.

HOA Assessments for 2021

By Christine Hast, General Manager

A quick reminder that the Carolina Preserve Assessments increased starting January 1, 2021.

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:**

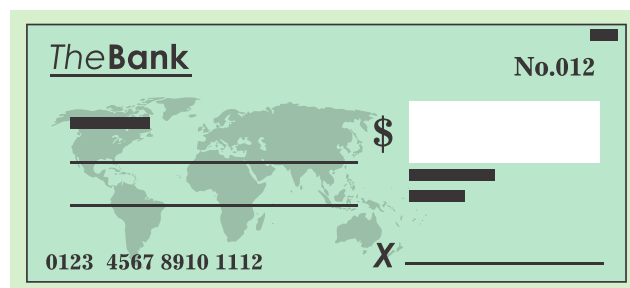
Billing /Assessment Statement. **The 2021 annual assessments are: \$3108.00 which is to be paid monthly in the amount of \$259.00 per month.**

The monthly payments will be due the 1st of each month with a 15 day grace period. However, after the 15th day, **a late fee of 10% of the standard monthly dues will be assessed to each account along with an additional 1.45% monthly interest charges until the balance is paid in full.**

If you currently are on auto pay through your bank, please notify your bank of the increase.

If you currently pay with a Kuester Auto Draft, the adjustment will be done for you.

If you pay Monthly by Check – all checks should be mailed to:
Carolina Preserve
C/O Kuester Management Group
P.O. Box 998
Commerce, Georgia 30529



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. 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

Phone: (888) 600-5044

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



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Homeowners Central



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View your account dashboard.

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Walking Safety

By Christine Hast

It is wonderful to see Carolina Preserve Residents still walking and biking even when there is a chill in the air! I want to remind all community members especially the early morning walkers and bikers and late-night walkers and bikers to please be careful and wear some type of reflective gear or carry a flashlight so drivers can see you, – especially if you happen to walk in the bike lane, which is not advisable.



Pay attention to your surroundings and if you hear a car coming, get back on the sidewalk until they pass.

Be safe and alert!

COVID-19 Vaccines

By Christine Hast, General Manager

Now that the COVID vaccine is available and being distributed – and it is exciting! - many of the residents of Carolina Preserve are asking if it would be possible to have a COVID vaccine clinic.

At this time, because the Federal and State Governments are in control of distribution and priority lists, having a COVID vaccination clinic at Carolina Preserve is out of our hands. We recommend keeping in close contact with your personal doctor and Insurance provider for the latest update and availability of when you and others at Carolina Preserve will be eligible for the vaccine.

This is the most recent press release from North Carolina:



When the vaccine becomes more common place, we will certainly reach out to the local pharmacies as we do with the flu shots to have them vaccinate our residents.

In the meantime, Stay Safe, healthy, practice social distancing and the 3 WWWs and practice patience.

Have a Happy New Year!



Seven Reasons 2020 was Awesome!

By Deborah Badger, Lifestyle Director

1

We walked together, getting to know each other and our neighborhood via multiple, varied routes carefully crafted by the talented duo of Womble & Womble.

2

We rode the streets of CP and the ATT while our bikes were well taken care of with private bicycle maintenance.

3

We played outside. Tennis, pickleball, golf, bocce, disc golf, fun in the sun at the pool, lawn darts, croquet, bucket pong, table tennis & corn hole.

4

We found Waldo. And discovered why he was hiding in the first place.

5

We paraded around waving and having a blast!

6

We rolicked in the parks. All of them. In all manner of weather - no matter.

7

We did our part to support small businesses from the handyman to the roofer, knife sharpener and a couple of food trucks.

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

Club Treasurer Training
with Finance Committee
January 5 | 10am

HOA Board Meeting
January 19 | 10:15am

HOA Board Meeting
February 16 | 10:15am



All meetings are held online
via GoToWebinar