

DECEMBER 2021 ISSUE XXV

CAROLINA PRESERVE

HOA NEWS

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HAPPY BIRTHDAY!



Two years ago, your HOA Board launched a new newsletter to keep residents informed of strategic plans, committee & task force projects, upcoming meetings, practical community information and more. Thank you to all those who contributed articles, ideas and photos to our neighborhood newsletter.



HOA President's Comments

by Tom Crotty



As we all wrap up 2021, I want to thank everyone for their support of the Board, our Advisory Committees, task forces and our Kuester staff. Its been another very challenging and successful year at Carolina Preserve. It's great to see Bradford Hall open again and residents utilizing the facilities.

I always like to look back at all the accomplishments and positive changes achieved during our past year. This year I want to thank the many residents that choose to volunteer at Carolina Preserve. We have so very many people that give tremendous amounts of their time for our HOA Community. The residents that served on our Task Forces do such a great job. The members of the Board Advisory Committees are invaluable to the board, meet at least monthly and mostly go unnoticed, except to the Board.

I am especially thankful for our General Manager and Kuester staff. The jobs they perform are exceptional. They do all their normal jobs and still manage the special projects and the task forces our strategic plan require.

So let me close with wishing everyone a happy, healthy, and safe holiday season and a special wish we all return to a more normal lifestyle in 2022.

Thank You

Town of Cary Gives Final Approvals for Pavilion

By Tom Crotty, HOA Board

The Bradford Hall Backyard task force as everyone knows, completed the revitalizing of the outdoor pool area in 2021. They also selected and recommended plans for a Pavilion to be constructed on the concrete pad next to the pool area. The Pavilion is a large 50 X 45 feet steel structure with lighting and fans. It will allow seating for just over 100 people. These plans were approved and funded by the Board. However, the plans have been under review with Town of Cary for about 10 months. But patience pays off. Christine Hast received notification that all construction plans, and necessary permits have been approved and signed.

This allowed the board to execute the contracts for the structure. This is a custom build. Once it is manufactured, it will be shipped to Carolina Preserve and assembled. Just be patient as it will take a while. The Board or General Manager will share dates as we receive them.

Great job Backyard Task Force!

In 2022 "Meet me at the Helipad" will become "Party at the Pavilion!"



Task Force Exploring the Possible Expansion of the Pickleball Amenity

In November, the Board and General Manager kicked off a large task force consisting of the officers of the Tennis and Pickleball club/group, along with an officer from the Golf club, the three newly elected Board Directors, and Robert Hamilton (Facilities Director). The agenda for the meeting was as follows:

The board expects this group to work as a team. Over the next several months we will discuss and investigate several items and alternatives for a possible amenity expansion.

The work the task force is doing is of high interest to the community and has generated many emails to the Board. Therefore, it was agreed that the progress of this task force would be reported monthly in this newsletter. This allows for one consistent means of communication to all residents. Our target is to present all our finds to the Community at a Community Meeting in late May or June 2022.

Meeting Agenda

- Review Board's authority to make any decision impacting a Carolina Preserve Amenity
- Pickleball on Har-Tru – The Har-Tru courts are a major investment for CP. Trying to leverage the utilization of these courts is important.
- Tennis and Pickleball court usage in 2021. Need for more data on use of courts.
 - Shrinking tennis club membership and utilization of tennis courts
 - For example, courts not used after 12 noon on almost any day
 - Pickleball courts being used are not accurately reflected in reservation system
 - Lack of historical data available for reservation system





Meeting Summary

For transparency, a summary of this meeting and subsequent meetings will be published in the monthly HOA eNewsletter. This allows all resident to stay current on these developments.

This was a very effective and productive meeting, attended by over 20 residents and Kuester staff. We covered a lot of ground and set a clear course of action to arrive at our end objectives. Our next meeting is after the holidays in January 2022.

Two primary objectives were established.

1. It was agreed that accurate data on court usage for pickleball and tennis does not exist. The Presidents of the Tennis and Pickleball groups were given the assignment to meet and determine how best to measure court usage starting December 2, 2021, through May 2022.
2. The Board will have architectural and feasibility studies completed on all possible locations for additional pickleball court expansion. This would include a detailed cost analysis. The Beckingham Loop park, the Bocce court area, and the parking lot next to the Tennis courts have been ruled out for use for possible pickleball court expansion.



The key takeaways from this meeting are the four assignments below. Our next meeting is scheduled for January 6, 2022.

Assignment - Initial submissions of court utilization data by both groups looked at different metrics. Tennis and pickleball group Presidents were asked to get together to determine what metrics should be investigated and tracked to measure court usage. These metrics must be in place to start tracking court usage starting December 1, 2021, through May 2022. This will allow the Board to equally compare court usage statistics using the same metrics. The Board expects to review these joint metrics before they go into effect on December 1, 2021.

Assignment - Looking at Tennis and Pickleball club membership it is impossible to determine the actual number of active players for tennis or pickleball. Both club presidents were asked to refine their membership ranks to have an accurate assessment of the players and non- players by April 2022.

Assignment - The Board will investigate the possibility of obtaining the capability to access historical data in the reservation system.

Assignment - The Board will hire Harris Engineering to perform feasibility analysis of locations within Carolina Preserve for possible additional pickleball courts that Town of Cary would likely approve. This will include architectural design and full cost analysis. Due by April 2022.



2021 Financials at A Glance

Operations (\$000)

	October Year To Date			Full Year	
	Actuals	Plan	B / (W) Plan	Plan	Forecast
Income	\$3,410	\$3,365	\$45	\$4,035	\$4,080 - \$4,085
Uses					
Reserves	\$547	\$527	(\$20)	\$619	\$639
Expenses	\$2,735	\$2,813	\$78	\$3,364	\$3,355 - \$3,360
Net	\$128	\$25	\$103	\$52	\$81 - \$111

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
12/31/2020 Final	\$938	\$286	\$86	\$40	\$772
Contributions	\$420	\$6	\$102	\$20	\$0
Interest	\$7	\$2	\$0	\$0	\$0
Expenses	\$271	\$2	\$60	\$0	\$0
BH Tower	\$98	\$0	\$0	\$0	\$357
10/31/2021	\$996	\$292	\$128	\$60	\$415

By Chet Sadosky, HOA Treasurer



Treasurer's Comments

By Chet Sadosky, HOA Treasurer

Spending in October was the lowest monthly spend in 2021. While work on the BH front yard, the replacement of trees and other work is going on, the vendors did not submit any invoices. The GM is working with our vendors to ensure that we are invoiced in 2021 for the work that is done in 2021.

October year to date Operations has a \$128k surplus which is \$103k better than plan. Areas that are better than plan are resale fees, both greater resales and higher revenue per resale, reduced Kuester staff and reduced BH utilities and maintenance costs. Areas that offset these savings are legal fees, stormwater repairs and an additional IIF contribution for the pavilion.

The full year forecast will have a greater surplus than the 2021 budget of \$52k. The most recent 2021 forecast is a surplus in the range of \$61k to \$96K.

However, spending through November 26th indicates that expenses will probably be less than we anticipated just a month ago. This means a greater 2021 surplus.

Reserve expenditures for both Replacement and Villa continue to be less than plan due to equipment lasting longer than the expected life.



An Active Lifestyle in 2021

By Lynnette Womble, Lifestyle Advisory Committee

Despite the challenges presented by Covid19 in 2021, your Lifestyle Department and Lifestyle Advisory Committee were able to provide a myriad of activities and events for CP residents to enjoy throughout the year.

Outdoor offerings included fitness classes, the St. Patrick's Day Cloverleaf Walk, Good Neighbor Day walks, the Jingle Bell Run/Walk, movies on the lawn, the spring community gathering (for which the weather was perfect!) the July 4th and Memorial Day pool parties, and Autumn Daze fun and games. The Fall Vendor Fair, the Club and Group Expo, and flu shot clinic, all normally held inside Bradford Hall, were successfully moved outside to the veranda areas.

A yard sale, ongoing bicycle maintenance, two knife sharpening offerings, and a community shred event all continued as usual. Then there were the newer and ever-popular weekly FOOD TRUCKS!

Virtual offerings were made available for fitness classes and training for club officers.

As vaccinations and booster shots became available, several indoor events were able to be scheduled: the weekly movie matinee, documentary/foreign film series, an acrylic pour painting class, Wind Down Fridays, and presentations on the downtown Cary Park, and TV streaming.

CP University offered five classes: Bradford Hall Architecture and a bird walk (both outdoors), and three lecture series on "How to Construct a New York Times Crossword Puzzle", "The First Carolinians", and "Wines of the Rhone Valley".

New Resident Orientation Workshops were presented monthly beginning in June (rather than quarterly, as had been previous practice) in order to accommodate the backlog of all the new residents who moved to CP during 2020 and 2021. Over 150 new residents attended.

A special thanks to the members of the Lifestyle Advisory Committee for meeting the challenges to provide a successful 2021.

An Active Lifestyle in 2021



ARC Makes it Easy For You

By Ken Merten, Architectural Review Committee

When ARC meets to review newly submitted Modification Requests, an all-too-common problem is MR's that lack neighbor ACKNOWLEDGMENT signatures. (Note: Acknowledgment, not approval.) This requires ARC to contact the homeowner and ask them to resubmit a completed MR with neighbor's signatures as detailed in the Design Guidelines. The homeowner can accomplish this by visiting neighbors to have them sign the MR form, or by email, sharing the project details and asking for a return email with the acknowledgment, which can then be copied and attached to the MR form that is to be submitted to Bradford Hall.

The purpose for this long-standing requirement is for adjacent neighbors (next door, behind, or across the street) to be aware of the project so that they won't be surprised when trucks, contractors, etc. show up and begin work. In addition, if a neighbor has a suggestion, concern or issue with the proposed project, they will have the opportunity to discuss it with the homeowner submitting the MR. Although rare, concerns can also be presented to ARC and or the CP Board before the project is approved by ARC.

This requirement was in the revised, January 12, 2012 "Carolina Preserve by Del Webb at Amberly" Design Guidelines and continues to remain in effect today.



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.



Landscaping Opt-Out 2022

By Christine Hast, General Manager

It is hard to imagine that in the middle of fall and winter, Bland Landscaping is planning for the spring and summer; mowing, weeding, fertilization, aeration, mulch and pruning, etc.

As reviewed in the Annual meeting, the Landscaping Opt-Out list is now open to select your choices for 2022 landscape services.

For 2022 there will be changes in the Landscape Yearly Opt-Out List:

- A. Opt-Out of all Landscape services
- B. Opt-Out of Pruning only
- C. Opt-Out of Mulch only
- D. Opt-Out of Pruning and Mulch

opt-out@blandlandscaping.com

There will be no changing options during the year

Once your selection has been made you cannot change your options until 2023
No Exceptions

**Opting-out of any landscaping services does not reduce
your monthly HOA dues.**

Town of Cary Police Partnership

By Christine Hast, General Manager

This is a reminder that Carolina Preserve has a signed Partnership Agreement with the Town of Cary Police Department for any resident who observes trespassing on any HOA common areas such as the parks, pickleball courts, the tennis courts, or any other amenities.

Last year, an email blast went out to the community, discussed in our quarterly open community meetings, and recorded in the meeting minutes, of our Partnership with the Town of Cary Police Department regarding seeing individuals trespassing on HOA common areas such as the parks and amenities.

To partner with the Town of Cary, the HOA went through great expense and time to post no trespassing signs in all the parks and amenities, have the areas inspected by the Police Department and sign a lengthy agreement with the Town of Cary.

Any Carolina Preserve resident observing trespassers on or using any common area property or amenities are to call the non-emergency Police phone number and to report the trespassing or vandalism at the time they are observing it.

The police will be dispatched and issue a trespass warning. If the individuals are caught again trespassing on HOA property, the Town of Cary Police has the authority through the signed agreement to make an arrest.

The HOA depends on observant and responsive community members to report any trespassers on HOA Community property directly to the Cary Police department. 919-469-4012. No action can be taken, and trespassing issues can't be resolved if these types of incidents are reported to the management staff late at night or days later after being observed.

If you observe any trespassing, please contact the Town of Cary Police Non-emergency number 919-469-4012 as you are observing it. A great suggestion is everyone put the Cary Police Department non-emergency number into their phone so they have it handy: 919-469-4012.



HOA Assessments

By Christine Hast, General Manager

As The HOA transitions to the New Year, beginning January 1, 2022 the monthly assessments will increase as discussed during the Budget Reviews and the Annual meeting. Please make sure your 2021 assessment account is up to date and not delinquent before January 1, 2022.

The 2022 annual assessments are:

- **Single Family Homes:**

Billing/Assessment Statement. **The 2022 annual assessment are: \$2,916.00 which is to be paid monthly in the amount of \$243.00 per month.**

- **Villa Homes:**

Billing /Assessment Statement. **The 2022 annual assessments are: \$3192.00 which is to be paid monthly in the amount of \$266.00 per month.**

The monthly payments are 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.**

To avoid receiving late fees and penalties, we encourage all owners to sign up for Auto Draft through Kuester: <https://kuester1.formstack.com/forms/dd>

Signing up for auto draft also saves the Association \$1.39 per mailing each statement.

If you currently pay with an ACH (Auto-withdrawal), there will be no statement enclosed as you will continue to pay through ACH for the regular assessment.

If you have auto pay through your bank, please remember to notify them, and adjust your monthly payment.





Holiday Lights & Displays

By Christine Hast, General Manager

Well, I guess you can call me Scrooge for bringing this up so soon when everyone is gearing up early for the holiday festivities as the 2020 holidays were pretty much a bust! This is just a reminder to review the Design Guidelines online, Section 4.17 Holiday and Special Occasion Decorations. I have seen some homes already where the elves have been busy stringing up holiday lights and not giving Thanksgiving Turkeys their two days in the limelight. Please remember that all holiday decorations must be removed from the outside of homes by January 10th.



BRADFORD HALL HOLIDAY HOURS



Christmas

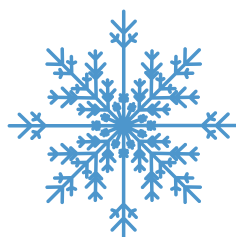
Friday, December 24 8am - 2pm

Saturday, December 25 Closed

New Year's

Friday, December 31 8am - 2pm

Saturday, January 1 Closed



2022 Bradford Hall Hours & Guests

By Christine Hast, General Manager

It's hard to believe that another year has flown by and yet, it feels that the last two years dragged on and on with the Covid-19 Virus. The HOA Board and staff appreciate all the cooperation and struggles of the Carolina Preserve residents during this time with the tough changes put in place for the health and safety of the community residents and Kuester staff.

The HOA Board and Kuester management during many discussions of Bradford Hall hours and guest policies, the decision has been made that Bradford Hall will return to normal operating hours beginning January 2nd. Bradford Hall hours will be Monday through Saturday 6 am to 10 pm. Sundays 10 am to 6 pm.

Allowing guests was also discussed in depth. The COVID numbers have been on the increase not only in North Carolina, but also in other states and around the world. New COVID variants are developing and popping up every day. Although the Town of Cary dropped their mask mandate, our surrounding counties still have mask mandates in place and most counties in North Carolina are still determined to be in the red zone. The holidays are upon us and as weather temperatures change, people will now start to gather indoors and the ability to travel is less restrictive than last year. To add insult to injury, we are now also in flu season.

The HOA Board and Kuester staff has decided to err on the side of caution at this time and keep the no guest policy in place at this time until we are sure the numbers of COVID cases decline after all the holiday gatherings and travel. While we know that this decision is disappointing and not what residents want to hear, the priority of the HOA Board of Directors is the health of community members while in Bradford Hall.

Please know that the Board and staff will continue to monitor the COVID numbers as the new year moves along and will continue to revisit the guest policy or any other decisions related to the operations of Bradford Hall.

In the meantime, enjoy the holidays with family and friends, but remember to take precautions of washing hands, waiting at the appropriate distancing when traveling or shopping and wear masks where appropriate or mandated.

2021 Committees

Architectural Review 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: Deborah Badger

Finance Committee

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

Board Liaison: Chet Sadosky | Staff Liaison: Christine Hast

Information Technology Committee

Jean Curtin | Dennis Curtin | Alan DeCrane | Amy Levine |
John J Stolzenthaler | Robert Willenberg

Board Liaison: Margaret Horst | Staff Liaison: 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 Open Working
Board Meeting
December 21 | 10:15am
Bradford Hall