

JULY 2021 ISSUE XX

CAROLINA PRESERVE

HOA NEWS

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SHUFFLEBOARD

Did you know King Henry VIII played (and lost) at shuffleboard? The game of kings is now yours!





HOA President's Comments

by Tom Crotty



It's July, meaning half the year has gone by. It's been a busy year for the Board, General Manager and our Kuester staff. Events are again happening in Bradford Hall. The biggest events so far are the Reopening Reunion (over 225 people) and Tuscany John Denver tribute band (170 plus people). Veterans club has July 4th Parade planned and much more. Many other clubs are back and scheduling weekly and monthly events. Normalcy is slowly returning.

In the second half of the year, Carolina Preserve will move forward with construction of the Pavilion next to the pool, startup a new Task Force to address Beckingham Loop Park, build a Financial budget for the next couple years, hold Board elections, plan fall landscaping changes, etc.

There are several informative articles within this HOA eNewsletter but I ask everyone please read the article titled "Future of the Carolina Preserve HOA Board of Directors".

Enjoy the summer, time with kids and grandkids and be safe.





Looking at the Big Picture Status for Carolina Preserve

By Tom Crotty, HOA President

The Board has received several emails from residents criticizing mowing, enforcement of CCRs, parking and noise and how run down and trashy our community is looking. Yes, several residents used the words trashy, or my lawn is wrecked or lack of enforcement of CCRs is rampant, and parking and noise is a mess. The Board and General Manager take these comments seriously, so I wanted to put some perspective around these comments.

Big Picture Assessment

On Saturday, June 19 and Saturday June 26, I completed tours of our entire Carolina Preserve community to conduct an assessment on our community's overall curb appeal. I examined the entire perimeter of our community and our interior (every street) by driving around. I did not check backyards as that would be trespassing. I find the trees all looking mostly great after being treated for diseases over the past two years and overall our landscape looks very good. Therefore, I must say I do not share these opinions or comments about the state of our community curb appeal. In checking with some realtors, they feel CP has an impressive curb appeal with its mature foliage, color and kept landscape. But everyone is entitled to their opinion.

Pulte did us no favors by creating all the low areas throughout our community that do not drain well after rains and create maintenance challenges for mowing when wet. But our community does have an impressive landscape bordering the Jordan Lake Preserve.

Enforcement of HOA Documents

CCR's are not only valuable but essential for any large HOA association. They also become very cumbersome and time consuming to enforce. Just look at our ARC guidelines. These are 81 pages of rules and guidelines. Our CP Covenants are another 99 pages plus there are 14 supplements. The CP By-Laws are another 21 pages of rules and procedure and I have not mentioned the Facilities Use Policy, Club Operation Policy, Board Operating Procedures, or any of our financial policies. Owners have access to all these documents from the resident website. Under the Governance tab on the blue menu bar, select CP Documents to find the documents you want. The website also includes information on how to request help if you are having difficulty finding a particular document.

That said, the community's curb appeal is much improved. Over 200 street trees have been replaced, and over 200 homes power washed, sod replaced, etc. this year and most yards are now in compliance with ornaments and have been decluttered. I am not making excuses, just stating the challenges of managing all these rules, property, and everyone's expectations. In addition, we must respect owners' privacy and allow time for them to address violation issues, so it sometimes seems like enforcement is being ignored while the process plays out.

Please remember that our entire administration of Kuester property management staff is only five full-time employees. Our Front Desk staff is made up of CP residents (your neighbors) and their role is to check in residents, handle deliveries, open and close the Bradford Hall, and answer basic questions. They are not trained in property management nor familiar with most CCRs. The Board and our Kuester staff strive to be consistent in enforcement of all rules and procedures but there are only so many hours available and there are always other competing priorities.

With all the contractors working in Carolina Preserve parking on both sides of the road, it makes getting past hard for most vehicles and impossible for emergency vehicles. Any complaints involving noise or parking should be forwarded to the **Town of Cary Police at 919-469-4012**. Enforcement of these ordinances are their responsibility.



Landscape Services

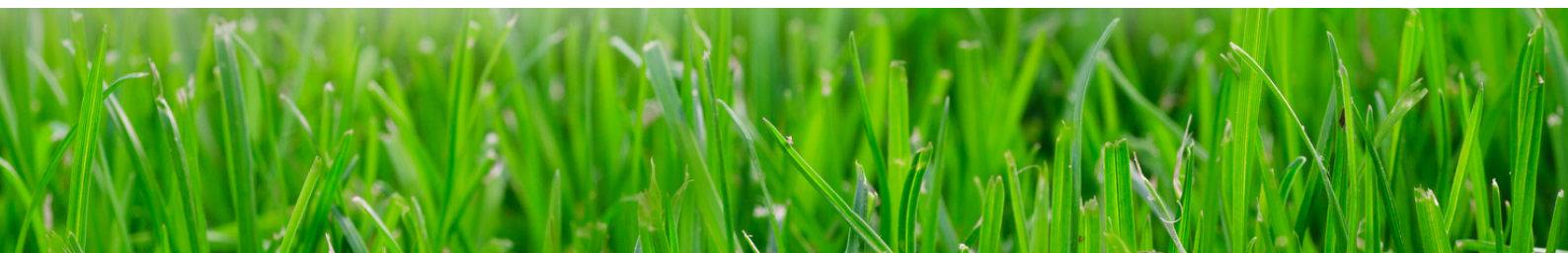
Carolina Preserve provides landscape services from large landscape service businesses commonly called “Mow and Go” companies. Most employees are not certified landscapers and have limited training. They are not arborists. The large Mow and Go companies service large communities and office complexes. They usually employ 2-400 people. There are not many of these types of companies. Within the Triangle area, the major companies are Yardnique, Bland, Yellow-Stone, and Brightview, and they all recruit from the same labor pool. These companies have struggled with a constant shortage of qualified labor for over two years.

The Board contracts for Bland to maintain the interior landscape of CP. They provide:

- Mowing
- Fertilizing and aeration
- Leaf removal
- Spraying pre-emergent weed controls in the fall, treating ant hills, spraying weeds in spring and summer, etc.
- Hard and soft edging
- Two pruning cycles starting in June

These negotiated services cost \$64 per month per household for all 1360 homes. This is roughly \$16 per week per household. The cost also includes the community common areas except Bradford Hall. Christine Hast, Chet Sadosky, and Tom Crotty meet monthly with Bland and Hansley Landscaping to discuss performance and address improvements and enhancements to our landscape. We review the work orders sent in by residents and their resolutions, with the goal of ensuring that the contractually required services are being provided with the highest quality possible. Managing the landscapers is a constant challenge. These meetings are important to allow us to alter the annual contract to adjust and improve services.

Many CP residents expect and continue to request custom landscape services and will never be happy with the Mow and Go service companies. The HOA offers these residents the option to opt-out of Bland Landscaping services to make their own arrangements for landscaping, at their own cost, with a provider that can offer more personalized services.



Summary

In the past two years Carolina Preserve has won the CAI Community of Excellence award, been featured in the national top 100 Retirement communities twice and our homes are selling at all-time record prices. Yes, we are dealing with landscaping issues which are not uncommon and normal for any community our size. Unfortunately, Bland has good days and bad days.

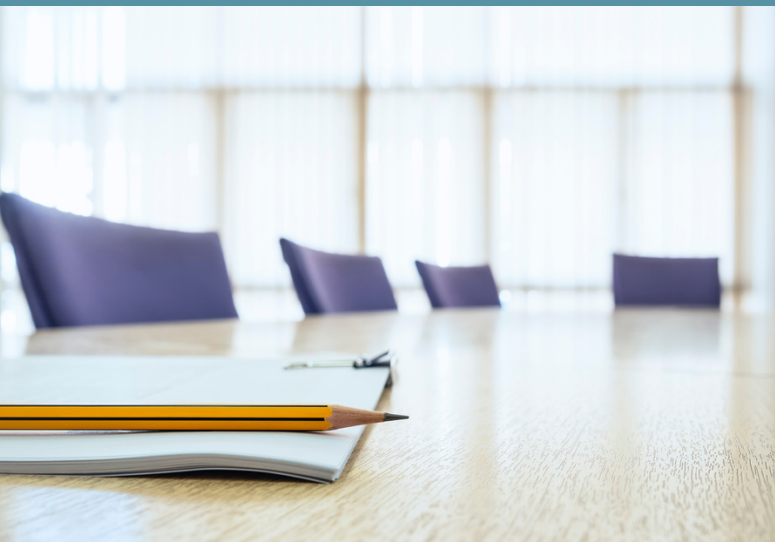
Weather impacts how the crews perform services. These meetings are important to allow us to identify problems and correct immediate problems and alter our annual contract for better service. We perform inspections for compliance as often as manpower allows. Remember all amenities are now open which consumes significant manpower resources.

As a Board member and GM we are always examining the Carolina Preserve big picture. Yes, we will have our share of problems and we will deal with them. But some issues take time to work out and resolve.

Tom Crotty

President, Carolina Preserve HOA Board of Directors





Future of the Carolina Preserve HOA Board of Directors

By Tom Crotty, HOA President

In my 4.5 years on the CP Board, it has been my privilege to work with fellow Board members, our General Manager and Kuester staff in a team effort to manage Carolina Preserve, create and implement a Strategic Planning process and undertake a number of significant projects (pocket parks and entrances revitalization, Bradford Hall refurbishing, Tower Project, Pickleball courts, soon to be Pavilion, Bradford Hall Backyard pool areas, etc.) that enhance our lifestyle and overall value of Carolina Preserve properties.

All this work is managed and driven by the HOA seven-member Board of Directors (BOD). The Board is approaching a potential crisis in 2021 that would force Carolina Preserve to reduce the size of the Board from seven to five members.

Makeup of the CP HOA Board

Over the past 5-6 years CP has had extraordinarily strong Boards made up of skilled professionals that worked and communicated extremely well together. This is my fourth year as President of the CP HOA Board. I am immensely proud of what the Board working with Christine Hast, Kuester staff and an army of resident volunteers has accomplished. We have faced many challenges and chose not to punt any of them down the road for future Boards to address but simply to deal with them as they were encountered. These Board members deserve to be recognized for their time, effort and what has been achieved over the past five years.

Below are the names of residents that have served with me and contributed to our many Carolina Preserve accomplishments over the past five years. If you see these individuals, please thank them for their time and accomplishments.

Chet Sadosky, Dave Weiss, Margaret Horst, Burt Katz,
Jill Poston, Carole Katz, John Siciliano, Rick Kirkpatrick ,
Robert Griffith, Eugene Harshbarger and Tom Crotty

However as with everything times change. The CP Board is made up of seven volunteer residents. In 2021 and again in 2022 three established, long-term Board members plan to leave the CP HOA Board. They have contributed many hundreds of volunteered hours and steered our community through many significant projects and challenges while solidifying our HOA financial future.

These departures mean that by end of next year the CP Board will need six new faces to fill these vacated positions. That is a lot of experience and knowledge CP will lose.

In August of this year the Election Task Force will start up and their first challenge will be looking for candidates for the Board. If we do not receive at least three candidates to run for office in 2021 by NC law, we must reduce the Board size from seven to five members.

CP is a large HOA community with 1360 homes, an exceptionally large clubhouse, many amenities, common areas, etc. Seven Board members is the correct number needed to serve in all the roles necessary to manage the size of our community.

Let us look at these roles.

“Volunteering is the ultimate exercise in democracy. You vote in elections once a year, but when you volunteer, you vote every day about the kind of community you want to live in.”

- We have four Board officers.
 - President – direct liaison to Kuester, the GM and our attorney
 - Vice President
 - Treasurer
 - Secretary – sends out all the Board communications, minutes, etc.
- We have three additional members at large.
- We have five Board appointed Advisory Committees. Each committee is overseen by a Board member and performs valuable work for the Board.
 - Architectural Review Committee
 - Club/Group Advisory Committee
 - Finance Committee
 - Information Technology Committee
 - Lifestyle Advisory Committee
- The Board also must appoint a Board liaison to the Amberly Master Board.
- The Board must follow and execute our Covenants and By-Laws, and update these documents.
- Task Forces require one or two Board members to create the mission for the task force and oversee all activity.
- Strategic Planning requires the entire Board to manage multiple focus groups and consider the annual projects and financial requirements to keep our community looking great.
- Everyone on the Board contributes to the monthly HOA Board eNewsletter which is the primary vehicle for transparency in actions taken or being considered by the Board.

What Happens if We Reduce the Board to Five Members?

If we reduce to five Boards members, the roles and current workload is much too large for only five people. Also, most of those elected will be first time directors. Therefore, the shape and structure currently in place would need to be modified to reduce the workload. This would likely include eliminating two Board committees, shutting down task forces and our Strategic Planning process as these all demand significant participation and much time by Board members. I do not think this is what CP residents want to see happen. We like our community the way it is currently maintained, updated, and improved.

— “ —

Volunteers are not paid
not because they are worthless,
but because they are priceless.

— ” —

So, what does this mean for the future of Carolina Preserve? It means that residents need to step up and serve on the Board. It is a rewarding job. We have over 2200 residents, and we just need seven to volunteer and work on the Board. The Board works as a team and hand in hand with our GM and Kuester staff. Yes, it takes some hours out of your schedule, but the workload is balanced across all Board members. Yes, it comes with some baggage. But that is why we have our Covenants, By-Laws, ARC Guidelines, etc. and our very competent and reliable attorney to guide the Board through these issues when they occur.

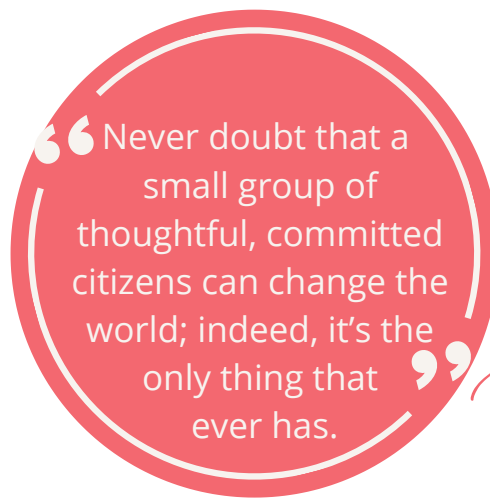
The entire CP Board and GM ask that all residents please think about running for the Board and serve our community. We need you.

On July 19, 2021, at 6:30 pm the Board and GM will hold an Open House type reception for anyone interested in running for the Board. We will share what Board membership means, commitment of time, how we make decisions, etc. This event will consist of a brief introduction and we will outline how the Board gets organized and sets our agenda for the year. There will be plenty of time for one on one and Q&As.

Agenda for July 19 Open House at 6:30 pm:

- Board Introductions
 - How the Board gets organized every January 2 and decides on officers and committee appointments.
 - How we oversee Board appointed Committees.
 - What each committee does and role of the Board liaison.
 - Our attorney provides some basic Board Of Director training and guiding principles for performance of our duties.
 - We establish our major priorities for the year.
 - How we conduct Strategic Planning and utilize task forces .
 - Our attorney will advise board members on any state laws that have changed or may change and any possible impacts on HOAs.
 - We confirm our schedule of board meetings, community meetings and financial meetings for the year.
 - Open Forum questions and answers from attendees.





Margaret Mead

Carolina Preserve - A Community of Volunteers

The HOA Board and Your Community Needs You!

By Carole Katz, HOA Vice President

Carolina Preserve (CP) relies on a small army of volunteers to keep everything functioning, our community vibrant, and a fun place to live. A well run Board backed by engaged volunteers are investments that help ensure our home values continue to increase. With as many as six current HOA Board members expected to vacate their positions in the next two years, we need you more than ever. If you might consider joining the HOA Board please register and plan to attend the reception on July 19. (See the article by Tom Crotty, Board President above.)

The fall Board elections will require the annual Election Task Force be staffed and functioning by August. Also, Committee members serve for one year and may have openings for the term beginning in January 2022. A call for future task forces may also emerge.

The best way to express interest in serving your community is on line via the Volunteer Form found on the CP website. Completing the form is non-committal and information is confidential. As needs for volunteers emerge, this is the first place for the Board, management and committees go to look for a potential match. Data is maintained for two years.

If interested in the HOA Board, it is best to register and attend the aforementioned reception. But even then, or if you absolutely cannot attend, indicate your interest on the volunteer form! It can be found on the website under Governance, Committees and Task Forces, below Where the Work Gets Done title, or click here:



2021 Financials at A Glance

Operations (\$000)

	May Year To Date			Full Year
	Actuals	Plan	B / (W) Plan	Plan
Income	\$1,690	\$1,663	\$27	\$4,035
Uses				
Reserves	\$282	\$282	\$0	\$619
Expenses	\$1,340	\$1,370	\$30	\$3,364
Net	\$68	\$11	\$57	\$52

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	\$196	\$5	\$82	\$0	\$0
Interest	\$4	\$1	\$0	\$0	\$0
Expenses	\$174	\$0	\$46	\$0	\$0
BH Tower	\$98	\$0	\$0	\$0	\$314
5/31/2021	\$866	\$292	\$122	\$ 40	\$458

Bradford Hall Tower Project: To date expenses: \$555k; Total plan: \$640k

By Chet Sadosky, HOA Treasurer



Treasurer's Comments

By Chet Sadosky, HOA Treasurer

May year to date Operations financials has a \$68k surplus which is \$57k better than plan. Please note that the 2021 plan is to have a \$52k surplus by year end to begin repaying the Operating Contingency for funds borrowed for the Bradford Hall tower project.

May year to date income of \$1,690k is \$27k better than plan due to higher resale fees. We have had 41 resales versus a plan of 25 and \$1412 per sales versus a plan of \$1300. Contributions to our four reserve accounts are at the plan levels of \$282k.

Operating expenses of \$1,340k are \$30k better than plan. There are many positive and negative variances among the 70 expense accounts with the following being the major items:

- BH utilities of \$52k are \$24k less than plan due to minimal use
- Labor expenses of \$207k are \$8k less than plan due to less front desk hours
- Legal fees of \$22k are \$17k higher than plan
- All other accounts amount to \$15k less than plan

The May BH Tower project to date expenses are \$555k and we anticipate a couple of additional invoices for a total of \$45k-\$50k to complete the project.

The spending rate starting in June will increase substantially from the prior months due to the opening of Bradford Hall, the hiring of an admin person and the replacement of trees and shrubs around BH and on the perimeter.

However, our full year forecast remains having a slightly greater surplus than the plan level of \$52k.



2022 - 2024 Budget Timeline

By Chet Sadosky, HOA Treasurer

The following is the timeline for the 2022 - 2024 budget:

Action Item	Date	Responsibility
Board issues guidance to GM and Finance	6/23/2021	Chet
GM issues guidance to staff/committees	6/25/2021	Christine
BOE's Submitted	7/23/2021	Staff/Finance
1st Draft Budget consolidated	8/2/2021	Chet
1st Budget Draft with Questions provided to Finance	8/4/2021	Chet
Finance Committee response to 1st draft questions	8/11/2021	Finance
Board presented with 1st Draft Budget	8/17/2021	Chet
Board provides comments on 1st Draft	8/31/2021	Board
2nd Budget Draft completed	9/10/2021	Chet
Board Review of 2nd Draft Budget	9/14/2021	Board
Final Budget completed	9/24/2021	Chet
Two Community Meetings - Budget Review only	9/28/2021	Chet
Last day for Community input	10/12/2021	Community
Board Reviews Community Input	10/15/2021	Board
Board Adopts Final Budget	10/19/2021	Board
Final Budget mailed to Community	10/29/2021	Christine
Community meeting to ratify budget	11/16/2021	Chet

Please note that there are two community meetings scheduled for September 28th to present the detail of the proposed budget to the community.

Folks will then have two weeks to provide their comments to the Board before the final budget is adopted.



ARC Makes it Easy For You

By Ken Merten, Architectural Review Committee

As ARC returns to its normal meeting schedule in Bradford Hall, one element needs some clarification. When ARC meets on the second and fourth Wednesdays of each month to vote on the submitted Modification Requests, homeowners are welcome to attend. However, 95% of the time, there really is no need to attend as ARC spends the prior week gathering missing/needed information from incomplete MRs. Occasionally, missing information that didn't reach ARC by the Wednesday meeting can be turned in, clarified or explained at the Wednesday meeting by the homeowner, which could prevent a two-week delay until the next meeting by ARC.

Should a homeowner fall into the above situation, ARC's Wednesday meetings (second and fourth Wednesdays of each month) are at 1:00 pm, usually in a Ballroom or meeting room. Check with the front desk for our location, first come, first served.

If you submit an MR by the deadline (the Wednesday one week before our regular Wednesday meetings), and haven't been contacted by ARC during that time period, you should be in the clear, which means that ARC didn't find any problems with your MR submittal.

Correction -

In the Design Guidelines section 3.3.25 Trees, the Yoshino Cherry is listed under the Medium Trees list and should be in the Large Trees list since it can grow to over 35'.



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.

Odds & Ends and What Not

By Christine Hast, General Manager

Now that the world is almost back in full swing – just a few reminders as more family and friends are visiting, and owners have contractors working on roofs or having projects done around your home.

Parking on the street

While permitted by the Town of Cary during the day, please do not park in front of mailboxes or driveways. The US Postal Service will not deliver mail if a mailbox is blocked. Please ask your guests or contractors when parking, to ensure they are not blocking driveways of other neighbors or their mailboxes on the street. Parking on both sides of the street is not recommended or having a contractor block half the street is not appropriate. Lastly, all streets must have clearance for emergency vehicles to pass. As a reminder, there is no street parking overnight per the Town of Cary.

Removing marking tape and signs to deter pruning

Totally understandable to tape off and put-up signs to ensure that Bland does not prune certain shrubs or plantings in your yard. If the Landscaper has completed pruning for your section, please remove any Do Not Trim signs or marking tape from your yard. The community will be notified when the second pruning round begins.

Contractors start times

If you are having a roof replaced or hired a contractor for projects around your home, please let your contractor know that start times for work per the Town of Cary is 7am Monday - Friday and 9am Saturday and Sundays.

Door to Door Solicitation

We all know that there are no solicitation signs at every entrance to our community and they are totally ignored by all company solicitors. While they are a nuisance, Kuester staff cannot be expected to go out chase them and ask every vendor to leave. If they come to your door, please remind them there is no soliciting and ask them to leave the community.



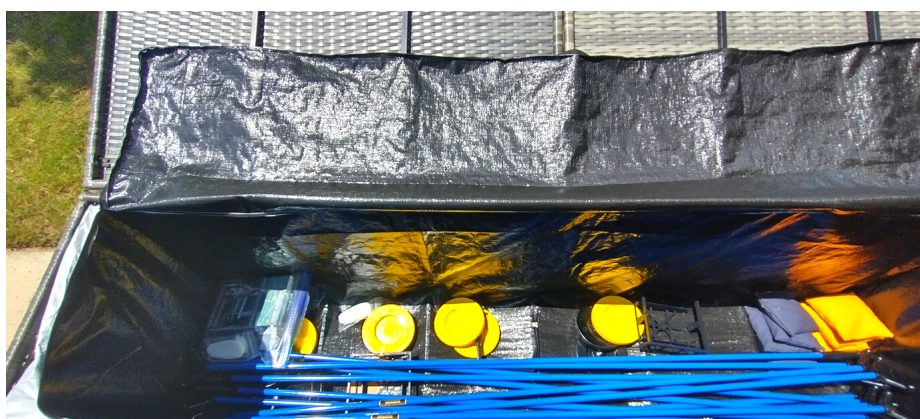
Badging In with your ID Card and Guest Sign In

It's been a while and everyone is getting back into a routine. When entering Bradford Hall, please remember to bring in your ID card and badge in. All guests must wear a wristband and be signed in by the owner that brings them.

If you haven't picked up your wristbands, please stop at the front desk. Each household is allotted 30 wristband guest passes per year. All guests must be 19 years or older. At this time, children's swim is still on hold until further notice.

The Gathering Place - Arvada Park

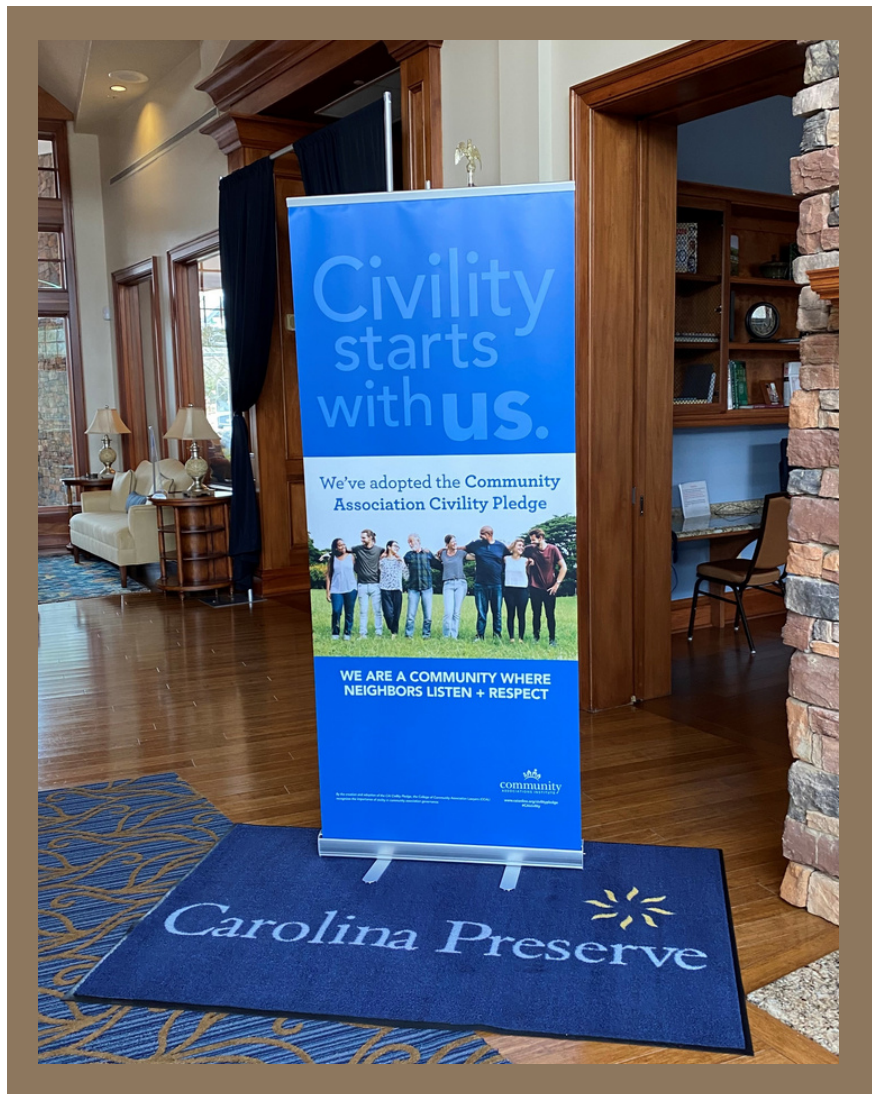
We are very happy many are taking advantage of the shuffleboard and corn toss at the park. Please make sure after using, all sticks and corn toss bags are properly stored back into the container, the rain proof bag is zipped, and the lid is place firmly down and latched with the lock. This past week, it was left unzipped and unlocked and the interior bag was filled with rainwater.



CAI Civility Pledge

By Christine Hast, General Manager

Last month the Community Association Institute (CAI) included a photo of Carolina Preserve in their monthly national magazine for community association leaders, Common Ground. The article was "Pledging to Improve Civility". The CP HOA Board adopted the CAI Civility Pledge in March 2020 to create community harmony and focus on our common interests. You can read the article using the link below.



Senior Games

By Deborah Badger, Lifestyle Director

The National Senior Games, a 19-sport, biennial competition for men and women 50 and over, is the largest multi-sport championships in the world for seniors. The next games will be held on May 10-23, 2022 in Ft. Lauderdale, FL.

Many Carolina Preserve residents participate in both the Chatham County and Wake County games and we have hosted several local competitions over the years as well. Winners then go on to compete in Fall NC State Finals.

This year Chester Hwang was highlighted in the Chatham Magazine after participating for the first time in the tennis competition of the Chatham County Spring games. Impressive! You can read the article about this year's local senior games in their online magazine below.



Congratulations to all the CP participants and thank you for representing your community.

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: Mary Gallagher, 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 | Amy Levine |
John J Stolzenhalter | 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

Future Leaders
Open House
July 19 | 6:30pm
Bradford Hall

HOA Open Working
Board Meeting
July 20 | 10:15am
Bradford Hall

HOA Open Working
Board Meeting
August 17 | 10:15am
Bradford Hall