

NOVEMBER 2021 ISSUE XXIV

# CAROLINA PRESERVE

HOA NEWS

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## THE CP LIFE



“

The need for connection and community is primal, as fundamental as the need for air, water, and food.

Dean Ornish

”





# HOA President's Comments

*by Tom Crotty*



Indian Summer is behind us, and the leaves are falling. Winter and the holidays will be upon us before we know it. With the hiring of additional front desk staff, Bradford Hall has adjusted their closing hours back to 10 pm (Monday – Saturday). The COVID 19 numbers for NC are once again going in a favorable direction. The Board looks forward to cubs and groups returning to scheduling monthly events. Hopefully 2022 will be a much more normal year for our residents.

October was a busy month for Kuester and the Board. All remaining contracts were finalized and the 2022 budget was finalized and approved by the Board along with several new hires were completed. The Annual Meeting is November 16 at 6:30 pm. It will be virtual again this year. See the article later in this newsletter for more information about how to attend this always important meeting. To be counted in the quorum for the meeting, you must submit your vote on the ratification of the 2022 Budget and IRS 70-604 Revenue Ruling using the ballot mailed to all homeowners. Ballots must be received by 5:00 pm on Friday, November 12, 2021

Carolina Preserve received approval from Town of Cary for our building plans for a Pavilion to be constructed on the concrete pad next to the pool. The next step is to receive the signed permits from Town of Cary. Once we receive these, we will place the order for the Pavilion.

Plans are being finalized for the landscaping revitalizing for the front of Bradford Hall. The work is planned to occur in December through February. Finally, the HOA Board elections are complete. Thanks very much to the twelve resident candidates that volunteered to run for office. See the results inside this newsletter.

# HOA Board Election Results

By Tom Crotty, HOA Board



Congratulations to all twelve candidates that volunteered to run for a seat on the Carolina Preserve (CP) 2022 Board of Directors. The existing Board greatly appreciates their time and effort in participating in this process.

Electronic voting closed on Friday, October 29 at 5 pm. This set the stage for the Election Task Force to meet on Monday, November 1 to count the manual ballots and certify the election results.

Drum roll!

Congratulation to Judith Nixon, Jerry Warren, and Sharon Valvona, and welcome to the CP 2022 Board of Directors. These new directors will start their two-year term January 1, 2022. Each new Board member brings crucial skills and experience that will benefit the board and community. Please congratulate the winners along with all the candidates that gave their time to run for office.



Leaving the Board are:

**Chet Sadosky** (4 years as Treasurer) has done a fantastic job managing the many financial challenges required by CP while maintaining a strong CP financial foundation. Realtors often comment that one reason they recommend CP to buyers is our strong financial position.

**John Siciliano** (2 years) served in two critical capacities. He was the Board liaison to the ARC, which is the most common place for CP homeowners to interact with the HOA. John was also the Board Project Manager for the very successful Tower project completed this year on time and within budget.

**Carole Katz** (4 years) served in many critical roles for the Board and leaves as the 2021 Vice President. Carole also was the 2021 Amberly Board Liaison and was instrumental in influencing changes in the Master Association. Carole also was the Lifestyle Advisory Committee board liaison for three years.

The CP community sincerely thanks Chet, John and Carole for their service and many, many contributions during their terms. If you see these individuals, please thank them for their hundreds of hours of dedication and contributions to our community over the years.

Finally, congratulations and recognition must be given to the 2021 Election Task Force consisting of David Jackson, Chair, Jeff Diton, Claudia Clissold, and Carl Wrublewski. They very successfully planned, organized, and conducted the BOD elections efficiently and on schedule. CP has never had 12 candidates run at one time and this created some new challenges that were managed perfectly. Great job everyone.





# Use of Cameras by the Board and Kuester Management

A question was raised about use of cameras around Carolina Preserve (CP). This article sets the record straight on use of cameras on CP common ground.

The Bradford Hall parking lot has one camera installed for safety and security reasons. The cost was under \$1,500.00. This camera makes unattended recordings that are only reviewed if there are incidents in the parking areas. In 2017-2018 the morning inspections of Bradford Hall and the surrounding grounds, the staff discovered countless beer bottles and other paraphernalia, that parties were taking place late at night in the Bradford Hall parking lot. Additionally, we found construction material, household items, etc. filling up our dumpster. The Board discussed the issue and approved to have a camera installed to surveil the parking area. This also was a safety measure for staff who closed Bradford Hall at 10:00 PM and walked to their cars alone. Since installation, during construction of the tower and other construction times when vendors' trailers were parked in the BH lot, their trailers were broken into, and thousands of dollars of material and equipment removed. The staff was able to give the video to the Town of Cary police to assist them in tracking the perpetrators.

There have been no Board discussions about use of cameras anywhere else within our community. Instead, in February of 2020, the HOA and Kuester management entered into an agreement of Trespass Authorization with the Town of Cary Police Department for other CP common elements and outdoor Amenities. Any member of the CP community or staff who witnesses a non-member jumping over amenity fences or otherwise using our amenities can call the non-emergency Town of Cary Police number and make a report. Police will come out, speak with the perpetrator(s), and issue a trespass warning. If any perpetrator is found again entering any amenity illegally, the Town of Cary Police can make an arrest and will notify the HOA.



# 2021 Financials at A Glance

## Operations (\$000)

	September Year To Date			Full Year	
	Actuals	Plan	B / (W) Plan	Plan	Forecast
Income	\$3,067	\$3,026	\$41	\$4,035	\$4,080 - \$4,090
Uses					
Reserves	\$500	\$480	(\$20)	\$619	\$639
Expenses	\$2,489	\$2,524	\$35	\$3,364	\$3,355 - \$3,380
Net	\$78	\$22	\$56	\$52	\$61 - \$96

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	\$378	\$5	\$102	\$15	\$0
Interest	\$7	\$2	\$0	\$0	\$0
Expenses	\$271	\$2	\$59	\$0	\$0
BH Tower	\$98	\$0	\$0	\$0	\$357
9/30/2021	\$954	\$291	\$129	\$ 55	\$415

By Chet Sadosky, HOA Treasurer





# Treasurer's Comments

By Chet Sadosky, HOA Treasurer

September year to date Operations continue to run favorable to plan and has a \$78k surplus which is \$56k better than plan.

The reasons for Operations being better than plan are:

- Resale fees are \$47k better than plan due to a greater number of sales (84 v. 59) and a higher revenue per sale (\$1468 v. \$1300)
- BH utilities are \$33k less than plan due to reduced usage
- Payroll expenses are \$41k less than plan due to less front desk hours and delayed hiring
- Maintenance costs are \$21k less than plan

Offsetting these savings are:

- Legal fees are \$18k higher than plan
- Additional IIF contribution of \$20k
- Higher storm water maintenance costs of \$37k
- Other accounts of \$11k

The full year forecast will have a greater surplus than the 2021 budget of \$52k. The 2021 forecast is a surplus in the range of \$61k to \$96K. We have used a 2021 surplus of \$80k in the 2022-2024 budget as was presented on September 28th.

Reserve expenditures for both Replacement and Villa are less than anticipated due to equipment lasting longer than the expected life.



# Carolina Preserve Investments

*By Chet Sadosky, HOA Treasurer*

There have been questions as to why, with interest rates so low, can't or don't we invest in mutual funds, ETFs, stocks or bonds to enable the HOA to earn a higher rate of return.

In 2015, CP recorded a loss of \$9748 and in 2016, CP recorded a loss of \$997. (These numbers come from the 2015 and 2016 federal tax returns.) Given the combined loss of \$10,745, the Board decided that the preservation of principal should be the paramount objective of any investment policy.

The Board adopted and has been following the following policy since 2017 (from the CP Financial Policy, version 3.0 dated 5/09/2020):

The primary objective of the Carolina Preserve Investment Portfolio is the preservation of principal. One hundred percent (100%) of the funds must carry full FDIC, NCUA or other government insurance of principal. Laddering CD investment maturities will be done in order to provide cash for anticipated reserve expense. This objective shall apply to all Funds (Operating Contingency, Replacement Reserve, Villa Reserve, Painting Reserve and Infrastructure Improvement) of the association.

In order to meet the aforementioned investment objectives, the portfolio will normally consist only of FDIC or NCUA insured CD's issued by US banks or credit unions or similar brokered CD's, bank money market and savings accounts, US Treasury bonds, or bonds issued by government agencies guaranteed by the US Treasury. CD's placed through a broker may only be bought at face value. No brokered CD's may be bought on the secondary market with a purchase premium or discount. CD's normally will not exceed 6 years maturity.

Each Board member has a fiduciary duty to all members of the Association, those who are risk-adverse as well as those who are more risk tolerant. Each Board member must use the care of a reasonably prudent person in a similar situation – that is a reasonably prudent person managing money belonging to others, not a reasonably prudent person making investment decisions for themselves.

This investment strategy only produces interest earned; there are no capital gains, quarterly dividends or stock appreciation.

Details of our investments at four banks (Wells Fargo Advisors, Capital Bank MD, Sandy Spring Bank and Live Oak Bank) can be found on our website under CP documents > Financial documents>Bank statements. There is also a file of our investment position as of 10/29/21. Please note that North State Bank has all of the funds required for day to day operations including reserve expenditures.





# 2021 Annual Meeting

2021 has been a whirlwind year. Through the Carolina Preserve Board, Kuester Management and COVID restrictions, we have the opportunity again to hold our Annual Meeting virtually.

Please join us virtually from the comfort of your homes. No driving in the dark or foul weather!

Each household should all be receiving in the mail and by email sometime this week the Annual meeting notice with a cover letter, information of how to log in to the meeting, the agenda, a copy of the Board approved 2022 Budget for review, a Ballot for approval of last year's Annual Meeting Minutes, the 2022 Budget Ratification and the IRS Revenue Ruling 70-604.

**Please make sure to complete your ballot, sign and include your name and address. The collection of ballots will also serve as our quorum for the meeting. There will be a ballot box placed outside the front door entrance of Bradford Hall. All ballots should be placed in the ballot box and received no later than November 12, 2021 by 5:00 pm. (One ballot per household). For your convenience, we will also be emailing the packet to your email.**

Please register for Carolina Preserve at Amberly Virtual Annual Meeting on Tuesday, Nov 16th 6:30 PM EST at:



TO USE YOUR TELEPHONE:

If you prefer to use your phone, you must select "Use Telephone" after joining the webinar and call in using the numbers below.

United States: +1 (562) 247-8422

Access Code: 977-474-609

Audio PIN: Shown after joining the webinar

Carolina Preserve HOA 2021 Annual Meeting Tuesday, November 16, 2021 6:30PM



# Autumn Daze

By Cathy Gottesman & Antonia Pinckney,  
Lifestyle Advisory Committee

The Lifestyle Advisory Committee (LAC) Autumn Daze Event was held on October 16th from 11:00 until 3:00 on a bright, sunny Saturday. Although the prediction was for rain, not a drop came down until the event was complete. The event included lawn games, sports demonstrations, and performances by our very own CP music and dance groups. The event was well attended and there was excellent participation from the volunteers, sports players, performers, and spectators. The Food Trucks were an added bonus to the event. Many residents commented on how much they enjoyed the day. A big thank you to the Lifestyle Advisory Committee and all the volunteers for putting this event together.





# 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.



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# Architectural Submissions

## Everything you need to know for Architectural Submissions

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

He can be reached at [Roberth@kuester.com](mailto:Roberth@kuester.com)

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



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

Wednesday 12 noon - Seven days before the scheduled meeting

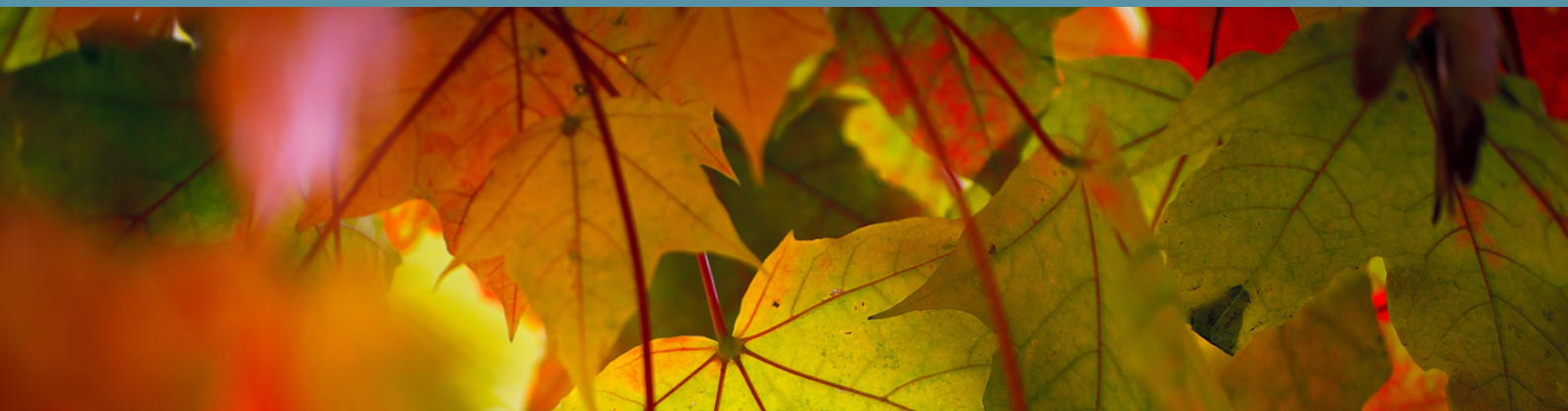
(Meetings are held twice a month: 2nd & 4th Wednesday)

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

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

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## Fall & Leaf Collection

*By Christine Hast, General Manager*

Fall is here and this is leaf collection season, which I dread more than weed season. For those members who are new to Carolina Preserve and a reminder to members who have been here for years, there are hundreds of thousands of trees in Carolina Preserve and surrounding Carolina Preserve in everyone's, yards, buffer areas, woods, and street scapes. So many, many, many, leaves. 400 acres of trees! The leaves in North Carolina fall later than in the Northern states, especially, the oaks. They are the last to lose their leaves and usually in late February.

There are five (5) leaf collections per contract. One in November, one in December, one in January and one in February. The final clean-up will be performed in March/April. This process will be performed section by section. All five sections will be blown and collected before the crew will return to the first section. They will blow from the back to the front of yards towards the street. A large vacuum truck will then suck up the piles and take the leaves to be dumped.

Leaves will fall or be blown by wind into your yard in between the monthly pick-up, more than likely, the minute the crew leaves your yard, and it may appear that they haven't even touched your yard. The Bland Crew will be back to your section for the second, third, fourth and fifth round. Please do not submit work orders claiming your yard has leaves, looks horrible and you have company coming. Bland will not come back just for your yard, and I guarantee your company has leaves all over their yard.

Please be patient.



# Town of Cary/Wake EMS - Good News

*By Christine Hast, General Manager*

If you recall, back in Late June, early July the Board became aware of issues with response times to Carolina Preserve 911 calls. This prompted the HOA Board and the General Manager to request a meeting with the Town of Cary, Wake and Chatham County EMS, Fire and Police services. The meeting was well attended by all Wake and Chatham County Supervisors and Communication Directors of Emergency Services as well as the Town of Cary Police Chief and Police Officers. The discussion was informative for the process and procedures followed by emergency service providers and the routing of calls that bounce off the Cell Tower on Pittard Sears Road.

The good news is that it was discovered there were some immediate changes that can improve the handling of 911 calls by re-programming our nearest Cell Tower for calls originating from within Carolina Preserve directly to Wake County and the Town of Cary for faster service.

In early October, The GM followed up with Chris Hegele- Town of Cary Police Department Communications, he confirmed Verizon has completed the work on the tower on Pittard Sears Road so that it now routes the Carolina Community 911 calls directly to Wake County and the Town of Cary emergency services instead of Chatham County. Response times for EMS and emergency vehicles should be faster.



# BRADFORD HALL HOLIDAY HOURS

## *Thanksgiving*

Thursday, November 25 Closed

Friday, November 26 8am - 2pm



## *Christmas*

Friday, December 24 8am - 2pm

Saturday, December 25 Closed

## *New Year's*

Friday, December 31 8am - 2pm

Saturday, January 1 Closed





# 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 Stolzenhalter | 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 Annual Meeting  
**November 16 | 6:30pm**  
GoToWebinar

HOA Open Working  
Board Meeting  
**December 21 | 10:15am**  
GoToWebinar