

JULY 2022 ISSUE XXXII

CAROLINA PRESERVE

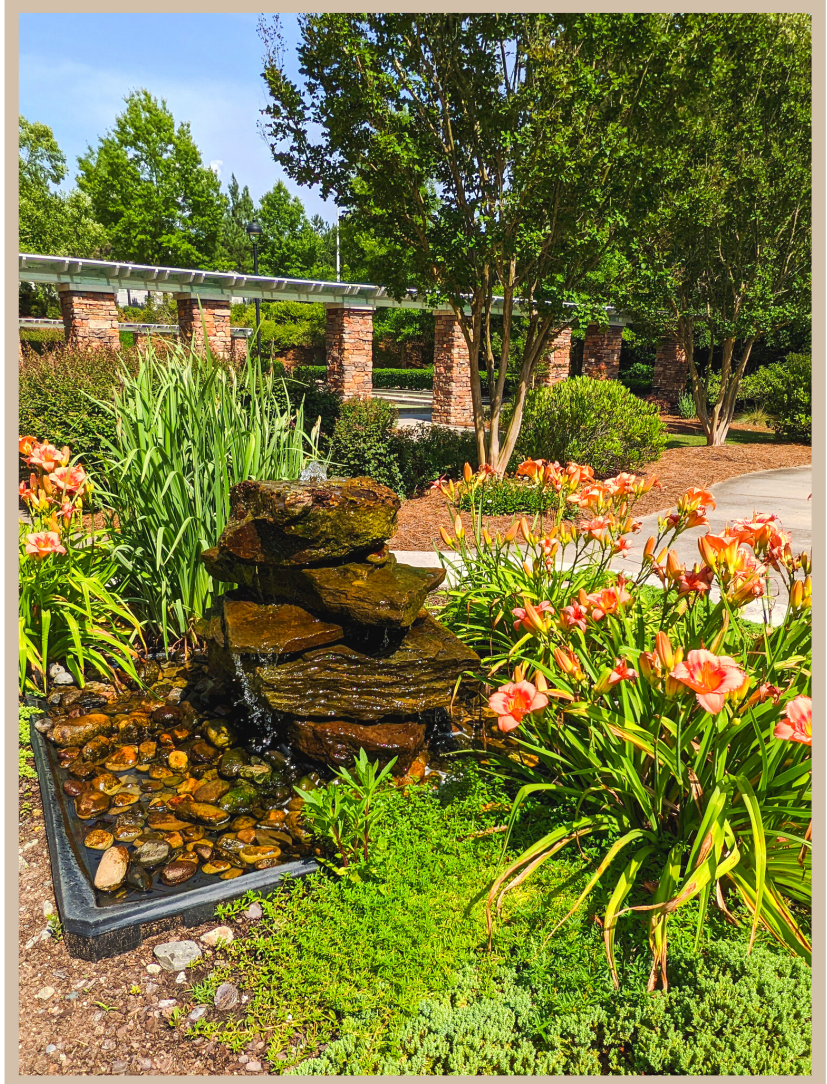
HOA NEWS

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ENJOYING THE BEAUTY



Carolina Preserve is a lovely locale with pocket parks, outdoor amenities, trails and woodlands. This time of year we are enjoying the allure of our splendid surroundings.





HOA President's Comments

by Judy Nixon



It's hard to believe that in just a few months we will be having another HOA Board election! It seems like yesterday when the 2022 Board was seated. I thought it would be a good time to remind and explain what the Board's function is, how we operate and then make the BIG ASK. As I explained during the winter in a previous article, the Board is comprised of CP volunteers democratically elected by you, the CP community. The community delegates to the Board the responsibility and authority to enforce HOA governing documents, maintain, improve and enhance the community's facilities and amenities, promote the health, safety and welfare and protect the community's property values. There are seven Board members who serve staggered two-year terms. This year there will be four Board positions open. In January of each year, the new Board elects its officers, President, Vice President, Secretary and Treasurer, to serve one-year terms. Board members also serve as Board Liaisons to task forces and the standing committees, Lifestyle Activities, Finance, Club and Group, Information Technology, Architectural Review, and Amberly Master Association. Once a month we meet in executive session and then in an open session to inform the community of the work the Board has before it and get community input. But our work is not limited to once a month, it is ongoing to address resident and community operational concerns, attending committee/task force meetings, and implementing programs/plans discussed during executive and open session. That brings me to the next topic; what does it take to be an effective Board member?

In my opinion, if you are interested in running for a Board position, be prepared to represent the whole community, because that is what it is all about, not advancing any personal agenda. You must be reliable in attending meetings, not just scheduled meetings but ad hoc meetings when unforeseen issues arise. Being a Board member is committing to spending sometimes substantial time on Board issues. Are you open to hearing differing views from fellow Board members and residents? In my view, robust debate and listening yield the best solutions for the community at large, but that also means there will be those who disagree with the Board's decisions. So, do you have thick skin? Are you prepared to make difficult decisions that may affect friends and neighbors when we are called to enforce CP governing rules and regulations? But most of all, are you prepared to experience the satisfaction and reward of meeting new people, learning from a diverse community and contributing to making Carolina Preserve the award-winning community it is. Being an effective Board member is not easy and can be very time consuming, but it is incredibly rewarding. Here's the BIG ASK: If you believe you can be an effective Board member, run for the Board. If not the Board, volunteer to be a member of the Election Task Force (ETF), which runs the HOA elections. We need dedicated residents on the Board and the ETF who put the community first. Be that resident.



I Want to Know . . .

Frequently Asked Questions

This recurring HOA Newsletter article addresses frequent questions raised by Carolina Preserve residents.

LANDSCAPING:

Q: IS THERE A PROBLEM WITH THE ENTRANCE FOUNTAINS?

A: Yes. As with all the mechanical features here at CP that operate 24/7, the entrance mechanical equipment breaks and needs frequent repair. The fountains' problems are being evaluated and long-term options are being explored.

Q: I UNDERSTAND THE BOARD HAS APPROVED THE LANDSCAPING RFP TO GO OUT TO SOLICIT BIDS FOR A NEW LANDSCAPING COMPANY. HOW WILL IT ADDRESS THE PROBLEMS WE HAVE BEEN HAVING WITH BLAND?

A: Good question. The Request for Proposal (RFP) was drafted to hopefully address the bulk of residents' landscaping complaints, such as failure to blow and remove leaves, not complying with opt out requests and not allowing residents to opt out of fertilizer and weed control. Clearly there were other complaints, but these comprised the most landscaping complaints. The RFP makes it clear there will be monetary penalties if the landscaping company does not comply with opt out requests or does not blow and remove leaves the same day. It also reinstitutes a resident's ability to opt out of fertilizer and weed control and requires the landscaper to post signs before and after there is fertilizer and weed control application. The RFP includes many other provisions but those are a few that address your question.

Q: WHEN IS THE WATERFALL FOUNTAIN BEHIND BRADFORD HALL GOING TO BE FIXED?

A: Good news! The Board voted to approve \$9,300 to hire a company to repair that fountain. Once the work begins, it is projected to take about two weeks to repair. Hopefully we will see it burst into life soon.

Q: WHEN AND WHAT IS THE IRRIGATION SCHEDULE FOR THE VILLAS?

A: The Villa irrigation system is scheduled to run Monday, Wednesday and Friday from around midnight/1:00 am for 3-5 minutes and finishes in all the zones by 4 am. The systems have rain sensors and will not run if the ground is too wet. If a villa owner believes there is an issue, please submit a work order through the work order system on the CP website.

MISCELLANEOUS:

Q: WHEN WILL THERE BE “KID SWIM” AGAIN AT THE POOL?

A: The Board is reviewing that policy monthly and we hope to have information at the July 19, 2022, Open Board Meeting pertaining to “kid swim.”. As a reminder, the outdoor pool does not allow “kid swim.” The Board’s decision only would apply to the indoor pool. Fortunately, since it is summer, CP residents can bring their grandchildren or other children to the Amberly pool. Don’t forget, Amberly amenities/facilities are your amenities too.

Q: THE BY-LAWS CALL FOR BOARD MEETINGS TO BE HELD AT BRADFORD HALL AND BRADFORD HALL IS NOW OPEN. WHY IS THE BOARD STILL HOLDING VIRTUAL MEETINGS WHEN THEY SHOULD BE HELD IN-PERSON AT BRADFORD HALL?

A: The CP Board is authorized to hold virtual meetings (i.e., electronic/remote) pursuant to CP By-Laws and NC statute. During COVID and after consultation with HOA counsel, the Board began holding virtual meetings to remain engaged with the community while avoiding increasing COVID infection rates. The Board found virtual meetings increased community participation and attendance. Because COVID is still with us and community engagement and participation are a Board priority, the Board has explained on numerous occasions, it will continue to hold virtual Board meetings until an effective hybrid meeting technology is found. Once found and installed, hybrid technology will allow for in-person meetings and provide residents who are uncomfortable attending in-person meetings due to COVID or any other reason, the ability to attend. While Bradford Hall is now open, that does not mean everyone is comfortable going there.

Q: WILL THE 8TH AMENDMENT TO THE DECLARATION OF COVENANTS EXEMPT OWNERS WHO SELL THEIR HOMES AND NEED TO REMAIN IN THE PROPERTY TEMPORARILY WHILE WAITING TO MOVE INTO THEIR NEW PROPERTY?

A: Yes, but it is not an exemption. “Rent backs” or “lease backs” are very limited in length and do not create a landlord/tenant relationship between the seller and buyer. Once the seller moves out, the new owner will have to meet the 12-month consecutive owner occupancy requirement before the property can be leased.

Q: IN SETTING UP FOR THE PICKLEBALL TOURNAMENT, IT WAS FOUND THAT THE AED EQUIPMENT HAD EXPIRED BATTERIES AND PADS AND THE AED UNITS CP HAS MAY BE OBSOLETE. THERE ALSO SHOULD BE AED EQUIPMENT AT THE PICKLEBALL AND TENNIS COURTS. WHAT IS BEING DONE ABOUT THAT?

A: Upon receipt of your question, the Board and Kuester management investigated your concerns and confirmed the Automatic External Defibrillator (AED) equipment at Bradford Hall is operational and not obsolete. Management contacted the manufacturer who explained that batteries and pads should be replaced every five years. The AED batteries in Bradford Hall were replaced in 2018 and are within that five-year window. Kuester management also took the AED machines to be inspected by the Fire Chief, who confirmed the machines are not obsolete and they are operational. The AED machines are checked on a weekly basis but although inspected, the inspection dates on the AED tag had not been noted. That has been corrected. Kuester also has ordered new batteries and pads to replace the existing ones when it is necessary. In response to the second part of your question, our research indicates it is not recommended that AED equipment be stored in extreme heat or sunlight. Additionally, AED equipment must be kept in unlocked receptacles for emergency access. If located at either courts or even the soon to be constructed Bradford Hall pavilion, it is highly likely the AED equipment would find legs and disappear given the cost of that equipment.

We believe it is important to share that all AED guidance provides that when an emergency arises the first action is to call 9-1-1 and begin CPR while someone goes to retrieve an AED machine. AED machines are located on the main level of Bradford Hall in the fitness center and the end of the activity rooms hall and downstairs outside the dance studio, all with signs indicating their location. There are also emergency 9-1-1 call buttons at the tennis courts shed and at the outdoor pool outside of the locker room doors. Because of your inquiry, to ensure residents know the locations of AED machines, 9-1-1 call buttons and first aid satchels, the Board asked Kuester to post maps at the pickleball and tennis courts as well as the Bulletin Board across from the fitness center identifying those locations. Finally, because CP is an active adult community and emergencies may occur, CP is offering residents a CPR /AED certification course July 27th starting at 6:00 pm. We encourage residents to sign up. Thank you for your important question.

CP NEWS IN BRIEF

July 2022

MONTHLY UPDATES

Vol 1 Issue 6

DECLARATION OF COVENANTS 8TH AMENDMENT ADDRESSING RENTAL CONCERNS:

To address the community's concern about the rental issue in Carolina Preserve, the Board's HOA attorney, drafted the 8th Amendment to the CP Declaration of Covenants. The 8th Amendment increases the minimum lease term to 12 months, requires owner occupancy for 12 consecutive months before the property can be leased and prohibits subleasing and lease assignments without prior approval by the Board. It exempts owners that buy CP property for family members to occupy and estates where the owner dies before having owner occupied the property for 12 months. A clean version of the 8th amendment will be posted soon for your information. A community vote will be taken during the last three weeks of August electronically and by paper ballot for those who prefer a paper ballot or cannot vote electronically. Because passage of the 8th Amendment requires a 67% approval of lot owners, we need volunteers to get the vote out, but to do so in a noninvasive way. To that end, the Board will provide mandatory volunteer training the first week of August. If you are interested in volunteering to get the vote out, please look for registration over the coming weeks.

UPCOMING HOA BOARD ELECTION MEETING:

This Fall, the CP community will be voting to fill four HOA Board positions. Newly elected Board members will be seated in January 2023. If you are interested in learning what it means to be a Board member, the commitment involved, and how to go about running, attend the Future Leaders Open House on July 18, 2022, from 6:30-8:00 pm at Bradford Hall. [Registration](#) is open now. Volunteers are also needed for the Election Task Force (ETF). The ETF is responsible for organizing and running the HOA election, including scheduling events such as Meet the Candidates, posting candidate statements and answers to community questions on the CP website and conducting the election. This is a critical task force for CP elections. If you are interested, please register when the call for volunteers goes out. You can find more information about the [Board](#) and the [ETF](#) on the CP website under the "Governance" tab.

BECKINGHAM LOOP PARK NEXT STEPS

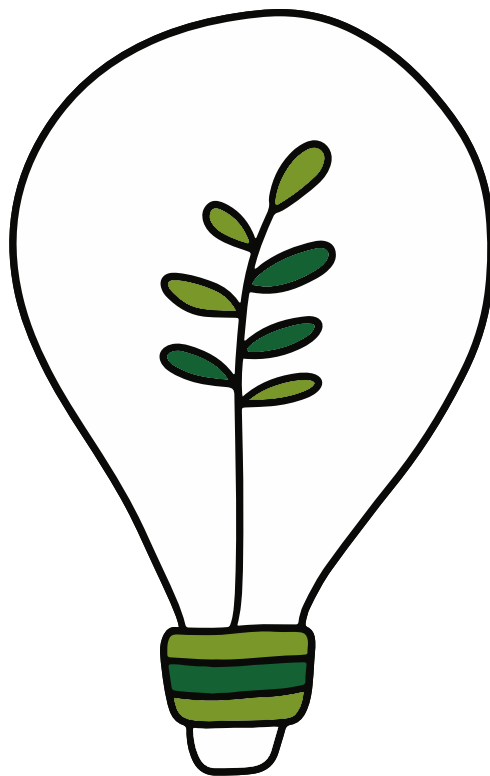
During the Board Open Meeting on June 21, 2022, the Board voted to move forward on some aspects of the Beckingham Loop Park Proposal, including the landscaping improvements and gardens, north corner refurbishment and path and benches. This work is projected to begin in the Fall 2022 and end in 2023. The Board also voted not to pursue the Astro turf proposal and tabled the pavilion proposal because of the upcoming construction of the Bradford Hall pavilion. These decisions were based on all resident comments received, which were thoughtful and well considered and the Board's evaluation of logistical and cost factors pertaining to the proposal. There was strong community support for the work approved by the Board. Thank you to everyone who took the time to review and submit constructive comments and suggestions to the Board. Thank you also to the Beckingham Loop Park Task Force for their work and great ideas!

PICKLEBALL COURT EXPANSION NEXT STEPS:

Community response to the Pickleball Court Expansion Proposal was substantial and helpful. There was overwhelming support (3:1) for expanding the pickleball courts but not as proposed. There was substantial concern about the cost of adding two courts in the retention pond area near the tennis courts and objections to taking away green space. Most residents who commented, suggested adding one court near the existing courts to promote the social aspects of the courts, reduce the construction cost, and consolidate the courts into a pickleball complex. Having considered all resident comments and evaluated the logistical and cost factors, the Board voted in open session against proceeding with the May 3rd proposal to add two courts to the area near the tennis courts. Based on community support, the Board also voted to retain Harris Engineering to draft plans for adding one court to the existing courts, cost out that option and obtain Town of Cary plan approval before taking a final Board vote whether to approve that plan. If approved, this plan would take place over 2023 and 2024. Again, thank you to all the residents who engaged in community participation and submitted thoughtful and constructive comments!

BRADFORD HALL ENERGY AUDIT AND IMPLEMENTATION

Almost all the Strategic Planning Focus Groups advocated for a Bradford Hall energy audit and other going green initiatives. We heard you. An energy audit of Bradford Hall was conducted and upon review, the Board voted to implement it. In the first year, energy savings are projected to result in a 23% return on investment. The Board is also considering other suggested green initiatives, for example, how we can reduce wasteful use of fresh water and enhance and beautify our landscaping using more native plants. Stay tuned.



2022 Financials at A Glance

Operations (\$000's)

	May YTD			Full Year
	Actuals	Budget	B/(W) Budget	Budget
Income	1,728	1,731	(3)	4,194
Uses				
Reserves	(236)	(236)	.	(616)
Expenses	(1,431)	(1,489)	58	(3,563)
Net	61	6	55	15

Note B/(W) budget means: B is a positive number: higher income or lower expenses
(W) is a negative number: lower income or higher expenses

Reserves + Equity (\$000's)

	Replacement	Villa	IIF	Painting	Oper Resv (Equity)	Tot Reserves + Equity
12/31/2021	1,016	303	42	65	528	1,954
Contributions	144		72	20	61	297
Interest	1					1
Expenses	(239)			(49)		(288)
5/31/2022	922	303	114	36	589	1,964

By Jerry Warren, HOA Treasurer



Treasurer's Comments

By Jerry Warren, HOA Treasurer

May income was \$356K, \$2K over Budget (primarily Lifestyle revenue), but expenses were \$5K above Budget (higher maintenance (\$8K) and landscape (\$7K), both reversing lower expenses in previous months, and higher Lifestyle (\$4K offsetting last month's favorability), all of which was offset in part by lower Villa expenses (\$8K, mostly timing of invoices), utilities (\$3K), and G&A expenses (\$3K). This resulted in a monthly \$5K loss (\$3K unfavorable to Budget, but YTD net income remains favorable at \$55K above Budget. Our re-forecast for the year shows that a portion of this YTD favorability will be reversed as the year progresses when some of the delayed spending occurs. In addition, the recent increased inflation in the country is most probably going to begin to affect our finances moving forward.

Resale fees were \$1K above Budget in May (7 homes sold), the best month of the year so far. Although we are still \$12K below Budget on a YTD basis, resales have now picked up and there are already 5 resales in June month-to-date.

The Replacement reserve is now at \$922K, down \$1K from last month and \$93K for the year. However, this situation should improve as greater monthly income is budgeted to the reserve for the remainder of the year. We still need to keep in mind the (at this point) unknown cost of the Marsalis project. We are trying to have the Town of Cary share in expenses for the repairs, but we may need to front the cost until a resolution is confirmed.



ARC Makes it Easy For You

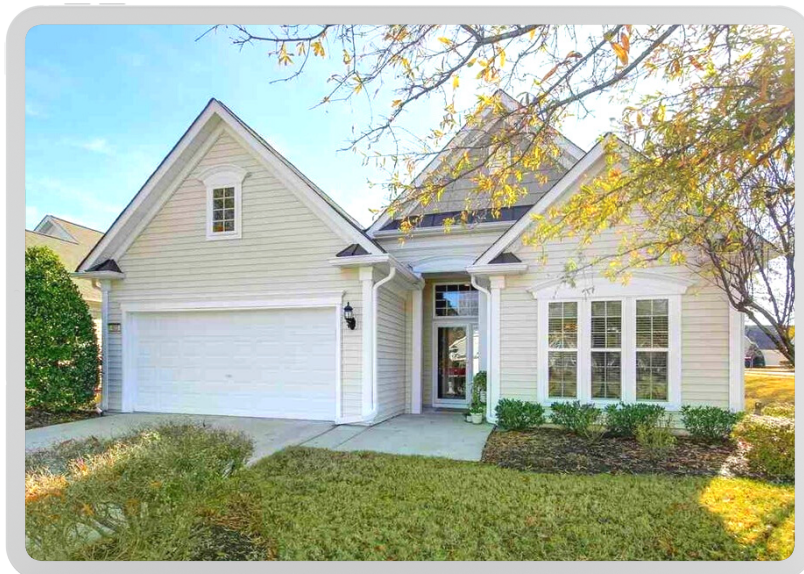
Understanding the Anomalies in the Design Guidelines

By Ken Merten, Architectural Review Committee

Homeowners that are considering changes or improvements to their yard or the exterior of their homes frequently get ideas from what they observe throughout the community. Other times they may ask neighbors or seek information through the community message board which is a good way to go about making a plan. Of course, the next important step is to look for the Design Guidelines on the CP website to understand what can or cannot be done and what the required process is to get the ball rolling. Nothing new here for homeowners that have been in CP for many years.

However, newer homeowners may not know the ins and outs of the Design Guidelines, but almost all questions can be answered by taking the time to explore them.

One issue for new or newer homeowners to understand is that many, many changes have been made to the Guidelines as they have evolved over several years. This means that you may see something that a homeowner did that was allowable under older versions of the Guidelines, but cannot be done under the current Guidelines. There are a number of these situations that have been “grandfathered”, so what you may see is possibly a “grandfathered” change and not a violation. ARC also has a “Variance Policy” which can be found in the Guidelines, if a homeowner thinks an exception to the current Guidelines is justified. Many of the “regulations” that CP must abide by are established by the Town of Cary, and ARC cannot offer a Variance when there is a conflict with those TOC regulations. However, asking the TOC for a variance is an option for homeowners that feel strongly about an ARC denial that was the result of a TOC regulation.



Don't forget that the majority of the rules/policies in the Guidelines are not in place because of the TOC or other government entity, they are there because CP believes they are necessary to maintain the community's beauty and home values as well as preserving CP's reputation of excellence.

Please understand that ARC is not responsible for the enforcement of the Guidelines, that is the responsibility of Management, specifically, Robert Hamilton Facilities/Operations Director. However, ARC does do Post Audits after the completion of approved Modification Requests and Fast Tracks, and if something does not conform to what was specified in the MR/FT, that information is passed on to Robert Hamilton. For example, replacing a street tree with a tree that is smaller than the minimum requirements, or a variety that is not listed in the Guidelines.

Contacting ARC to help clarify issues is always an option, but please do your homework first by checking out the segment(s) of the Design Guidelines that address your project.



The Architectural Review Committee, or the "ARC," reviews plans and specifications for the construction or modification of improvements and administers and enforces the Design Guidelines within the Community.

ARC Design Guidelines: (pertains to your home: improvements, changes, etc.)

Note: If you have a problem with the hyperlinks in the document, try downloading it to your local computer and opening the file with the Adobe PDF Reader.

[DESIGN GUIDELINES VERSION 8.0 \(April 2021\)](#)

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.

2022 Committees

Architectural Review Committee

Steve Botha | John Bongino | Elizabeth Diton
Bill Gurecki | Claire Hammitt | Ken Merten | MaryJane Slusser

Board Liaison: Tom Crotty | Staff Liaison: Robert Hamilton

Club & Group Advisory Committee

Wanda Abel | Claudia Clissold | Judy Dorezas
Joel Glassman | Cynthia Jackson | Linda Laurich
Marie Milazzo | Paulette Shekell

Board Liaison: Robert Griffith | Staff Liaison: Terrie Murray

Finance Committee

Dennis Curtin | Steve Harrison | Dennis Hefner
Rahul Parikh | Paul Wolf | Ted Young

Board Liaison: Jerry Warren | 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: Glenda Hunter

Lifestyle Advisory Committee

Carol Ciccarello | Dennis Curtin | Jeff Diton
Cathy Gottesman | Antonia Pinckney | Gayle Streifford
Lynnette Womble | Annette Young

Board Liaison: Jill Poston | Staff Liaison: Deborah Badger

2022 Board

Judith Nixon
President

Tom Crotty
Vice President

Jerry Warren
Treasurer

Sharon Valvona
Secretary

Robert Griffith
Member at Large

Margaret Horst
Member at Large

Jill Poston
Member at Large

Mark Your Calendar

HOA Future Leaders
Open House
July 18 | 6:30pm
Bradford Hall



HOA Board Meeting
July 19 | 10:15am
GoToWebinar



HOA Board Meeting
August 16 | 10:15am
GoToWebinar