

MARCH 2022 ISSUE XXVIII

# CAROLINA PRESERVE

HOA NEWS

## INSIDE THIS MONTH'S ISSUE:

Spring Arrives 1  
HOA President's Comments 2 - 3  
I Want to Know FAQs 4 - 7  
CP News Brief 8 - 10  
Financials At A Glance 11  
Treasurer's Comments 12  
LAC CP University 13  
ARC Makes It Easy For You 14  
ARC Submissions 15  
HOA Assessments 16 - 17  
Committee Members 18  
Board Members 19  
Mark Your Calendar 19



*Spring* **ARRIVES**



Time to enjoy all that Carolina Preserve offers, from outdoor fitness amenities, greenways, pocket parks, the Bradford Hall terrace - let's get out there CP!







# HOA President's Comments

*by Judy Nixon*



Based on resident inquiries and comments, I've learned over the last two months that the CP HOA Board of Directors' ("Board") role within the community may be unclear or misunderstood. That's why I thought it would be helpful to briefly describe and explain the Board's responsibilities and authorities under the CP Declaration of Covenants ("Declaration") and By-Laws. To begin, the Declaration is the document that established how Carolina Preserve as a Homeowner's Association would operate. It provides the legal framework pursuant to NC law, by which the HOA is governed. Under the Declaration and its implementing By-Laws, the Board is a democratically elected body of seven resident volunteers. Every year a portion of Board members are elected to serve for two years. Every year officers, President, Vice President, Secretary and Treasurer, are elected by the new Board for one-year terms. These community elected volunteers are responsible for promoting the health, safety and welfare of the community, maintaining the facilities and amenities, and protecting the community's property values. You, the community, delegate to the Board, the authority to meet those responsibilities. And it is you, the community, who can voice your pleasure or displeasure with the Board's performance and decision-making, by exercising your vote during Board elections. This is your responsibility as a CP resident, but you also need information to meet your responsibilities.

The 2022 Board is committed to providing you with as much information and facts as possible before it makes a decision that affects the community. That is why the Board put out for comment the proposed change to the Facility Use Manual and when all the Pickleball Court Expansion data is in, the Board will present it to you and ask for your input. When the Beckingham Loop Park Task Force presents its recommendations, you will be asked for feedback before any decision is made. We, the Board, want to hear your constructive suggestions as to these projects and future projects through strategic planning focus groups. But it is important to understand, that under NC law and CP governing documents, with a few exceptions (budget approval, declaration changes, removal of amenities), decisions do not require a community vote; it is the Board that you elected, which is responsible for making decisions. That is why it is so important for you to be informed by reading the governing documents, newsletters and attending Board meetings. Together, with your constructive input and feedback, the Board will do its best to make decisions in the best interest of the CP community. To learn more about the Declaration and HOA By-Laws, go to the “Governance” section on the HOA website dashboard and scroll through the various governing documents.

# I Want to Know . . .

## Frequently Asked Questions

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

### Landscaping Questions

**Q: WHY DOES BLAND BLOW THE LEAVES IN THE FRONT YARD ONE DAY AND THE BACKYARD ANOTHER DAY?**

*A: Because houses back up to each other, it is inevitable that when Bland does the backyard of another house, the leaves will fall into the backyard of an adjacent house. Instead of doing backyards twice, Bland waits until they do abutting houses and then returns to complete the backyards.*

**Q: WHY CAN'T I DIRECT THE LANDSCAPER WHERE AND HOW MUCH MULCH I WANT ON MY PROPERTY?**

*A: The spreading of mulch on CP properties is determined by the contract between Bland and CP. Residents who ask Bland for more mulch and direct where they want it, are altering the contract terms and may incur additional costs for the HOA while also delaying performance of the work. Please do not contact Bland workers while they are spreading mulch. If you have a request, please use the Work Order system that can be found on the CP website.*

### Bradford Hall Spa Question

**Q: PLEASE EXPLAIN EXACTLY WHAT IS CAUSING THE SPA TO BE SHUT DOWN FOR SO MANY DAYS DURING THE YEAR. IT'S BECOMING A REAL PROBLEM FOR THOSE OF US WHO MOVED HERE 2-3 YEARS AGO, BUT LONGER-TERM RESIDENTS HAVE TOLD ME SPA CLOSURES WERE AN ON-GOING PROBLEM EVEN BEFORE THAT.**

*A: As with anything that runs 24 hours a day, seven days a week, whether being used or not, things can go wrong at any time. The spa is checked daily and serviced if needed. Although we try to anticipate when equipment needs to be replaced, some things cannot be predicted. If equipment breaks, we try to repair as soon as possible.*



## Policy Questions

**Q: WHY IS THE BOARD SPENDING MONEY FOR HARRIS ENGINEERING TO RESEARCH POSSIBLE LOCATIONS FOR ADDITIONAL PICKLEBALL COURTS WHEN I DON'T SEE THEM BEING USED THAT MUCH BASED ON WHEN I WALK BY IN THE MORNINGS OR LATER IN THE DAY?**

*A: While there are times the courts are not being used, the Board is looking at club membership, reservations and open play statistics. Based on that quantitative data, it appears the pickleball courts are very popular and widely used. Therefore, the Board believes Harris Engineering providing information about possible locations for additional pickleball courts is necessary to fully ascertain the feasibility of expanding the pickleball courts.*

**Q: WHY SHOULD THE COMMUNITY CARE OR WANT TO ADD PICKLEBALL COURTS?**

*A: Carolina Preserve is an award-winning 55+ community because it evolves and provides a host of activities and programs for everyone. That is what protects and increases our property values. Currently, newer 55+ communities are installing pickleball courts at almost a 3 to 1 or 4 to 1 ratio to tennis courts. Pickleball is the future in active adult communities. The Pickleball Club membership and reservation statistics currently indicate it is one of the largest clubs and the courts are one of the most widely used facilities at CP. If the community wants to stay competitive, provide an amenity that is widely used and protect our property values, the Board must determine if it is feasible to add one or two more pickleball courts because of the usage demand in our community. If it is feasible, together with our excellent HarTru tennis courts, we will have enviable court offerings for current and future residents. However, before any decision is made, the community will be presented all the data to offer constructive input to the Board.*

**Q: IS THE TOWN OF CARY CONSIDERED A HOA CONTRACTOR OR IDENTIFIABLE POTENTIAL CONTRACTOR CONCERNING MATTERS RELATING TO HOA COMMON PROPERTY UNDER PROPOSED SECTION 2.2.9 OF THE FACILITY USE POLICY?**

*A: No. The Town of Cary is not considered a HOA contractor or potential contractor under the proposed new Section 2.2.9 of the Facility Use Policy. The proposed new section pertains to those businesses that directly contract with the HOA to provide services to HOA common areas, such as landscaping, pool service, painting, court maintenance, etc., and pertains only to resident contact related to those HOA contracted services. The Town of Cary is a governmental entity that serves all its residents. It does not directly contract with the HOA to provide services. Additionally, vendors who are used by Lifestyle and other clubs/groups for events, are not covered by proposed section 2.2.9.*

**Q: WHEN WILL BRADFORD HALL BE OPEN TO GUESTS?**

*A: The Board is reviewing the no guest policy every month to determine when to allow guests. Its decision is based on the totality of the information, including current infection rates in surrounding counties and at CP. The Board will announce at each monthly meeting its guest policy decision. In the meantime, if you have been exposed to COVID and you have been tested, please do not attend club, group or other functions until you have your test results. Recently, there have been residents testing positive who attended functions while awaiting their results thus putting other residents at risk of infection.*



**Q: CAN A CLUB OR GROUP REQUIRE MASKS FOR A MEETING OR OTHER FUNCTIONS EVEN THOUGH THEY ARE NOT REQUIRED BY THE HOA IN BRADFORD HALL?**

*A: Yes, a club or group can require masks for meetings or other functions. Under the CP Facilities Use Policy Section 4.3.6, event sponsors such as clubs, groups, residents or the Lifestyle Department, may establish their own rules as to the conduct and propriety of participants, which includes requiring masks. You can learn more about clubs and groups, by accessing the CP Club Operating Manual and the Facilities Use Policy on the CP website under the “Governance” tab.*

**Q: I SENT AN EMAIL TO AN INDIVIDUAL WHO IS A BOARD MEMBER. WHY DID I GET A RESPONSE FROM THE BOARD AND NOT THE INDIVIDUAL BOARD MEMBER?**

*A: The By-Laws prohibit individual Board members from responding to resident inquiries sent to their personal email addresses. If you have an inquiry, please send it to [hoa.board@cpamberly.com](mailto:hoa.board@cpamberly.com). You will receive a response within 5-8 business days.*

# CP NEWS IN BRIEF

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March 2022

MONTHLY UPDATES

Vol 1 Issue 2

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## **IT'S HERE!! STRATEGIC PLANNING**

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Strategic planning focus groups for Carolina Preserve will begin in April and be in-person at Bradford Hall. Put on your thinking caps, be creative and sign up to provide ideas and constructive suggestions as to how you would like to see CP move forward in the future. Ideas can be about physical infrastructure as well social infrastructure. Watch for registration in upcoming Lifestyle Newsletters. Space is limited, so register early once registration opens.

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## **CP VIRTUAL/HYBRID PROGRAMS AND MEETINGS**

The Board is currently exploring how it can expand community participation and engagement through virtual means. The Information Technology Committee (ITC) is researching functionalities that would allow residents to attend meetings in-person or virtually and for those attending virtually, provide them the ability to be seen and/or ask questions directly rather than through a "chat" feature. This is all in the research stages, so watch this space!



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## RENTER/OWNER OCCUPANCY STATUS

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*By Judy Nixon*

Here are some facts: CP is made up of 1,360 houses. As of January 2022, 56 total properties (4% of all CP properties) are rented, with 9 LLC's renting 14 properties (1%), Family Trusts renting 7 properties (.5%) and individual owners renting the remaining 35 properties (2.5%). There are no Real Estate Investment Trusts owning CP property. Whether there is a CP rental issue depends on what the community sees as the problem. Is the problem that tenants won't maintain rental property? Is it that corporate ownership will dilute owners' ability to determine how CP operates? Is it that CP just doesn't want renters?

Any solution must address what the community defines as the problem. Some solutions won't be possible under NC and Federal laws, such as prohibiting business entities from buying CP properties. Some solutions will require 67% owner approval (912 homes) and may incur significant legal costs due to potential lawsuits and other necessary legal work. Other solutions can be found in CP's existing rules and regulations. That is why we need your help. Let us know whether you think there is a rental problem, and if so, what you see as the problem. A Club Express survey will be going out in early March to ask for your input. Please complete and submit it as soon as possible. The Board will then report the results to the community at the April 5 2022, HOA Quarterly meeting. To be clear, this is NOT A VOTE nor is it a formal statistical poll. It is simply an information gathering tool to aid the Board in presenting to the CP community its recommendations/decision.

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## BECKINGHAM LOOP PARK TASK FORCE UPDATE

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*By Carol Randall*

The Beckingham Loop (BL) Park Task Force (TF) has been hard at work over the past month organizing the elements of what will be going into the BL community park for everyone to enjoy. The Task Force needs to select vendors for the various amenities going into the park, obtain cost estimates and decide where each amenity will be placed. The TF will present a proposal to the HOA Board in the Spring for a feasibility review (i.e. cost, safety, parking, noise, etc.). After the Board reviews the initial proposal, it will be returned to the TF for changes, if applicable. The TF's final proposal will be presented to the community for constructive feedback and comments. Once The Board approves the plan, engineering plans and drawings must be submitted to the Town of Cary for its final approval.

The Task Force currently is close to deciding on the type of shelter to recommend for the park and other enhancements that will both benefit and delight our neighbors and the community. You can see this is not a process that happens overnight. The Beckingham Loop Park Task Force team is a very creative group who work well together and continually improve on each other's ideas. Along with CP Management and our HOA Board Liaison the team continues to forge ahead to bring ideas together for a beautiful park everyone can enjoy.

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## AMBERLY PROPERTY OWNERS ASSOCIATION (POA) UPDATE

*By Judy Nixon*

The Amberly POA Board, of which I am a member, met virtually on January 26, 2022. It elected officers for 2022 and then voted on certain measures relating to swimming pool maintenance, equipment repairs and lounge furniture replacements. It looks as though the Amberly swim season will be in full swing when the pool opens in late spring!



# 2022 Financials at A Glance

## Operations (\$000's)

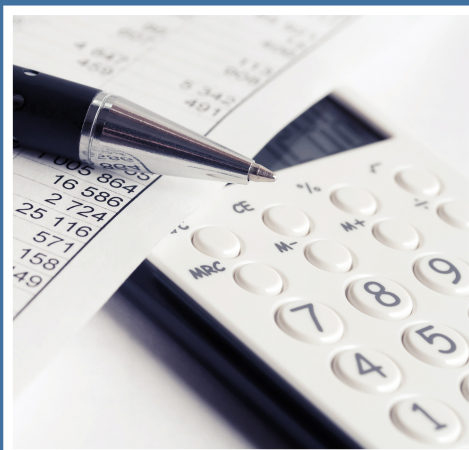
	January			Full Year
	Actuals	Plan	B / (W) Plan	Plan
Income	\$341	\$342	(\$1)	\$4194
Uses				
Reserves	(\$53)	(\$53)	.	(\$616)
Expenses	(\$267)	(\$286)	\$19	(\$3,563)
Net	\$21	\$3	\$18	\$15

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's)

	Replacement	Villa	IIF	Painting	Operating Contingency
12/31/2021	\$1,016	\$303	\$42	\$66	\$528
Contributions	\$31		\$17	\$5	
Interest Expenses	(\$102)				
1/31/2022	\$945	\$303	\$59	\$71	\$528

By Jerry Warren, HOA Treasurer



# Treasurer's Comments

*By Jerry Warren, HOA Treasurer*

January income was \$341K, essentially at Plan levels, while expenses were \$19K below Plan (primarily lower utilities (\$4K), maintenance expenses (\$5K), and landscape expenses (\$10K). This resulted in a surplus \$18 greater than Plan. As it is only the first month of the year, it is still hard to tell if this favorability will carry on for the year or just be a normal monthly variance.

Resale fees were \$3K under Plan. However, this shortfall was offset by some small overages in a few other income categories, primarily fitness pass revenue.

There were some large invoices this month for storm water management, some of which relate to 2021 activity, that were delivered in late January after last year's accounts were closed. These expenses were charged directly to the Replacement Reserve. Even after these charges, we still have a reserve of \$945K.



# Carolina Preserve University



By Jeffrey Diton, Lifestyle Advisory Committee

The Lifestyle Advisory Committee (LAC) helps support the strategy of the Board of Directors through operational initiatives that create a positive, active and diverse lifestyle at Carolina Preserve. One such initiative is Carolina Preserve University (CPU). The main objective of CPU is to provide “college-like” courses based on the Osher Lifelong Learning Institute (OLLI) model that span a wide range of interests. We try to schedule at least six multi-session courses each year at the lowest cost level possible.

Recently an email blast went out to all residents requesting suggestions for future CPU classes. We were overwhelmed with the response and we thank all those residents that submitted suggestions. Keep in mind that there are many factors that contribute to whether or not a suggestion becomes an actual class offering. These factors include time, available space in Bradford Hall, instructor availability, community-wide appeal, and cost to name a few. The CPU sub-committee certainly has our work cut out for us investigating all the wonderful suggestions we’ve received.

We thought it might be prudent to provide some guidance on what exactly constitutes a CPU class. As mentioned above, we are striving for a “college-like” experience, so first and foremost the offering must be educational. The course should be structured and organized like a college course, without the homework of course! The course needs to be informative and entertaining, so we are looking for skilled presenters in addition to interesting topics. Finally, we want all the courses to be culturally enriching. A CPU course is NOT a general “how-to” session, nor a for-profit offering (like a financial planner), nor a performance, show or concert. While Bradford Hall does host these types of events, they are more appropriate for the general Lifestyle Program than the CPU.

Thanks again for all the wonderful ideas, and please continue to submit suggestions to [CPUUniversity@CPAmberly.net](mailto:CPUUniversity@CPAmberly.net) as we look to build a pipeline of CPU offerings for years to come.



CAROLINA  
PRESERVE  
UNIVERSITY

# ARC Makes it Easy For You

By Ken Merten, Architectural Review Committee

ARC reviews and modifies the Design Guidelines annually in an effort to clarify confusing issues, as well as making them less restrictive where appropriate.

While we try to “make it easier for you”, we also understand that for some in the community, they are still confusing and a bit overwhelming.

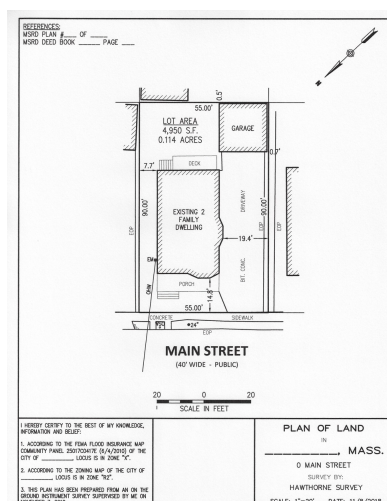
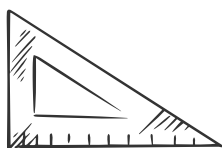
Nevertheless, ARC is frequently frustrated by the number of Modification Requests that are submitted that are missing essential information. Before ARC votes to approve MRs on the second and fourth Wednesdays of each month, we also meet on the preceding Fridays to identify MR shortcoming and assign ARC members to follow up with homeowners that have incomplete MRs. Actually, ARC receives the list of MRs from Robert Hamilton, Operations Manager two days before the Friday meetings, so that each member of ARC can read through the MRs looking for problems. All this is quite time consuming. It is essential for the homeowners to take the time to read through the appropriate Guidelines that address their specific project, and then follow through with what is required (highlighted in RED) at the bottom of each Guideline.

We understand that some of the requirements may be difficult to achieve (photos and plot plans, etc.), but ARC would appreciate your best efforts.

Occasionally, we make exceptions, but in some cases, there is no way to approve an MR without the required information.

ARC makes every effort to gather the missing information between our Friday and Wednesday meetings so that the homeowner does not have to wait another two weeks or more for the next review cycle. One option for ARC is to return the deficient MR to the homeowner and simply state that it is missing some of the requirements, and for the homeowner to resubmit the MR for the next review cycle, which will delay the project.

ARC appreciates your cooperation in this matter.



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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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# 2022 Assessment Amounts

*By Christine Hast, General Manager*

The new Assessment amount changed January 1, 2022. This is a reminder for those who have sent incorrect amounts by check or have not updated your bank of the new amount.

## **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.**

You can sign up for ACH (Auto-withdrawal) here:  
<https://kuester1.formstack.com/forms/dd>

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.**

**If you prefer to pay by sending a check, please mail to:**

**Carolina Preserve HOA  
C/O Kuester Management  
P.O. Box 998  
Commerce, Georgia 30529**



### **Web-Site Registration**

If you have not already done so, please take a few minutes to register your account on the Kuester website by visiting [www.kuester.com](http://www.kuester.com). To register, simply click the “Homeowner Login” tab located in the upper right corner of the screen and then click the brown “register” button in the right top hand corner of the screen that opens. Once your information has been validated in our system you will be able to access your account information online 24/7. By registering you will also ensure that you receive important community e-mails that the Board and Kuester periodically send out to the community regarding community events and news.

### **Questions/Concerns**

If you have any questions or concerns, please contact our community support team at:

Email: [support@kuester.com](mailto:support@kuester.com)

Phone: (888) 600-5044

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



# 2022 Committees

## Architectural Review Committee

Steve Botha | John Bongino | Elizabeth Diton  
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 | Dawn Schildhorn | 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 Stolzenhalter | 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 Open Working  
Board Meeting  
**March 15 | 10:15 am**  
Bradford Hall



HOA Community Meeting  
**April 5 | 6:30 pm**  
Bradford Hall



HOA Open Working  
Board Meeting  
**April 19 | 10:15 am**  
Bradford Hall