

MAY 2022 ISSUE XXX

CAROLINA PRESERVE

HOA NEWS

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MAGGY AWARD



Carolina Preserve is once again listed in the Best Active Adult Community category this year. You can read the entire magazine [here](#).



HOA President's Comments

by Judy Nixon



Carolina Preserve is again an award winner! It came in third in Cary Magazine's 2022 Maggy Awards for active adult living, which is great because the first and second place winners are continuing care retirement communities, which are somewhat different than Carolina Preserve. Continuing to win awards is a testament to CP residents' commitment to this community because Carolina Preserve is only as good as its volunteers and management staff. The Strategic Planning that took place in April is an example of that commitment. Resident participation in the Focus Groups was phenomenal and the ideas even better! Kuester staff and local realtors' strategic input was invaluable. Strategic planning suggestions included going green initiatives, enhancing CP's physical infrastructure, expanding community activities, and recommending cost effective measures to grow CP's social media reach within CP and to prospective residents. So, what's next?

The Board will evaluate all the focus groups' suggestions to determine what is logistically feasible, cost effective and benefits the community as a whole. Once that evaluation is complete, the Board will prioritize implementing the selected suggestions over the next three years and post its proposed 3-year plan on the website for your input. At the annual meeting in the Fall 2022, you will be presented the 2023-2025 Strategic Plan. Unfortunately, not every suggestion will meet the above criteria for inclusion, but that doesn't mean they weren't good suggestions. For example, it may mean the project had too high a cost when balanced with the overall community benefit; or it was not possible given Town of Cary ordinances; or there just was not enough physical space available for the project. To learn more about what the focus groups suggested, attend the Community Meeting on Tuesday, May 3, 2022, at 6:30 pm, which will be held virtually.

I Want to Know . . .

Frequently Asked Questions

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

Landscaping Questions:

Q: I OPTED OUT OF ALL LANDSCAPING YET BLAND CONTINUES TO COME ON TO MY PROPERTY FOR LANDSCAPING WORK. WHAT DO I HAVE TO DO TO STOP THIS?

A: If you submitted an opt out request, you shouldn't have to do anything else. The Bland supervisor is supposed to flag properties who have opted out and clearly that did not take place. We are addressing this issue. Every year, the HOA evaluates the success of landscaping services to plan for the next year; what worked, what didn't work. The Board will do so again and keep the opt out procedure in mind when preparing the Request for Proposal (RFP) to solicit commercial landscaper bids for the future.

Amberly Lake & Carolina Preserve Pond Usage:

Q: IS BOATING, SWIMMING AND/OR FISHING ALLOWED ON AMBERLY LAKE BETWEEN YATES STORE ROAD AND ALLFORTH AND THE POND LOCATED BETWEEN ARVIND OAKS AND BICKERTON COURT?

A: Boating and swimming are not permitted on either body of water. Catch and release fishing is allowed on Amberly Lake and must follow all fishing ordinances regarding permits. However, due to liability and safety concerns, the Carolina Preserve HOA does not permit fishing in the pond because it is a Natural State Preservation Area and therefore a wild natural area thick with plants, grasses and trees that attracts snakes, rodents and may result in possible slipping into the water or drowning. For more information, see the Facility Use Policy, Section 9.0 under the CP website's Governance tab.

Trespassing:

Q: WHAT DO I DO IF I SEE SOMEONE USING CAROLINA PRESERVE FACILITIES OR COMMON AREAS AND I KNOW THEY ARE NOT CP RESIDENTS? ARE THEY TRESPASSING?

A: First, be certain the person(s) you think may be trespassing really do(es) not belong here. CP residents have grandchildren or other family members who visit and are guests. Don't make assumptions. But, if you know for certain someone may be trespassing, do not confront them. Call the Cary Police non-emergency number at: 919-469-4012. When reporting the incident, if asked, inform the Cary Police that Carolina Preserve has an agency agreement on file with the Department pertaining to trespassing.

In-person HOA Meetings:

Q: I UNDERSTAND WHY WE HAD VIRTUAL HOA MEETINGS WHEN COVID WAS SPREADING LIKE WILDFIRE, BUT WHY AREN'T WE BACK TO IN-PERSON MEETINGS NOW THAT INFECTIONS HAVE GONE DOWN?

A: You are correct that virtual HOA meetings were implemented because of COVID. What we found was that there was greater attendance and participation when the meetings were held virtually. Because COVID will most likely be with us in the foreseeable future, the Board is exploring the cost and options available to implement a hybrid meeting where people can attend in person but also remotely if they feel more comfortable doing so. Until we can find an effective hybrid system, we will most likely continue virtual HOA meetings to reach a larger audience and provide more opportunity for community participation.

CP NEWS IN BRIEF

May 2022

MONTHLY UPDATES

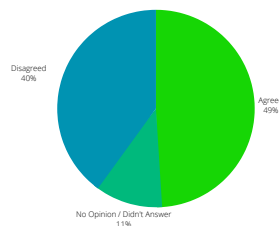
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RENTAL/OWNER SURVEY RESULTS:

By Judy Nixon

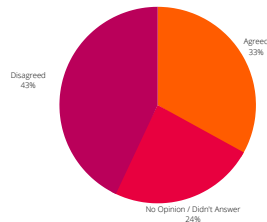
The rental/owner survey results are in! As reported previously, 2,100 surveys were emailed but only 1,810 were opened. The difference is due to residents who opted out of receiving HOA emails or the emails on file with the HOA are not correct. Of the 1,810 surveys opened, 393 were submitted, a total return rate of approximately 22%. Below is the raw data; strongly agree and agree are combined as is strongly disagree and disagree. The Board will report at the May 3rd Community meeting more information and recommendations, if any.

Question 1: CP Rentals are not an issue:



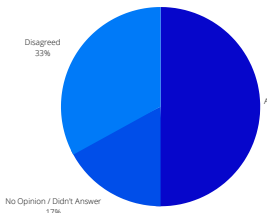
49% agreed not an issue
11% did not answer or had no opinion
40% disagreed

Question 2: Corporate owners have disproportionate influence on CP governance:



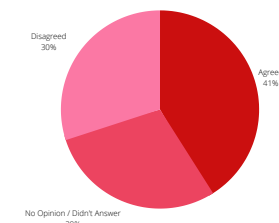
33% agreed
24% did not answer or had no opinion
43% disagreed disproportionate influence

Question 3: Rental properties decrease property values:



50% agreed decreased property values
17% did not answer or had no opinion
33% disagreed

Question 4: Maintenance of rental properties is an issue:



41% agreed maintenance an issue
29% did not answer or had no opinion
30% disagreed

BECKINGHAM LOOP PARK TASK FORCE:

By Carol Randall and Tom Croft

Over the past several months, in numerous HOA Newsletters, the Task Force (TF) described its Mission Statement, the criteria applied in its decision-making process, park enhancements considered as well as some ideas that were not going to be considered. In mid-April the TF met with the HOA Board to present its proposal for renovating the largest pocket park in Carolina Preserve, which is aimed at both beautification and adding new amenities and features. We believe the community will more actively engage in the use of the park with these renovations. We will present our proposal in detail at the May 3rd Community Meeting. If you'd like to hear and see our renovation proposal, please attend the virtual Community Meeting on May 3, 2022, at 6:30 pm. Questions will be taken in advance of and during that meeting.

BECKINGHAM LOOP PARK COMMUNITY INPUT:

First, The Board wants to thank and commend all the Task Force (TF) members for their hard work, enthusiasm, and ideas for renovating Beckingham Loop Park. The Board now will review and evaluate the TF's renovation proposal presented on April 19, 2022. The proposal will be evaluated based on cost, logistics, safety, potential noise and TOC parking requirements and other ordinances, if applicable. As stated above, the TF will present its recommendations to the community at the May 3, 2022, virtual Community Meeting. Afterwards, the community will have a 30-day comment period. Based on community input and the Board's review, the Board will present its decision to the community this summer.

PICKLEBALL COURT EXPANSION TASK FORCE:

To determine whether to add pickleball courts, the Board in consultation with the task force members, obtained various information. It engaged Harris Engineering to locate viable location(s), if any, for additional courts. The task force members monitored current usage of existing courts and its growth as well as providing pickleball national trends. The Real Estate Agent focus group provided information whether adding pickleball courts will keep Carolina Preserve competitive in attracting new residents desiring an active adult 55+ community. Based on the foregoing, The Board is now weighing whether there is a community need for additional courts and whether adding pickleball courts when balanced with the cost for doing so, will enhance community property values and the community recreational experience. The Board will present its preliminary findings at the May 3, 2022, Community Meeting for community comment.

MAY 3, 2022, CAROLINA PRESERVE COMMUNITY MEETING:

If you've read this far, you see that there is a lot of information that will be presented at the May 3rd Community meeting! It is important that you have all the facts on upcoming projects and the pickleball and Beckingham Loop Park projects are not the only projects that will be presented. You also will receive an update on the Marsalis retaining wall repairs, strategic plan ideas for 2023-2025, the Bradford Hall pavilion construction status and the Carolina Preserve 2022 first quarter financial report. If you want to know what is going on in Carolina Preserve and be heard, you need to attend this important meeting. Again, May 3, 2022, 6:30 pm and it will be held virtually to encourage more attendance. See you (virtually) then!

MAILBOX AND STREET SIGN TASK FORCE UPDATE:

By Tom Croft

The Mailbox and Street Sign Task Force has made great progress in addressing the ongoing string trimmer damage at the bottom of mailbox and street signposts. We evaluated three commercial product designs for mailbox posts with varying degrees of success in terms of the target criteria: reasonable cost, easy installation or easily applied, and low maintenance. The two leading designs take only a few minutes to install and could serve as protection of the mailbox post sleeve. A commercial product will likely not be required to address the street signposts in favor of a simpler solution. The Task Force has documented the installation process and the materials and tools required for installation. We currently are assessing installation labor options to input into our cost modeling spreadsheet. The Task Force will meet with the HOA Board in May to present and discuss its proposal. Stay tuned.

2022 Financials at A Glance

Operations (\$000's)

	March YTD			Full Year
	Actuals	Budget	B / (W) Budget	Budget
Income	1,032	1,028	3	4,194
Uses				
Reserves	(135)	(135)	.	(616)
Expenses	(830)	(887)	57	(3,563)
Net	66	6	60	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 (\$000's)

	Replacement	Villa	IIF	Painting	Operating Contingency
12/31/2021	1,016	303	42	66	528
Contributions	77		43	15	
Interest	1				
Expenses	(198)				
3/31/2022	896	303	85	81	528

By Jerry Warren, HOA Treasurer



Treasurer's Comments

By Jerry Warren, HOA Treasurer

March income was \$344K (on Budget) with expenses \$23K below Budget (lower utilities (\$8K), maintenance expenses (\$3K), and landscape expenses (\$11K). This resulted in a monthly surplus \$23K greater than Budget (YTD surplus of \$60K). Now that we have 3 months behind us, next month we will begin forecasting the remaining portion of the year as a lead-in to Budget season, extrapolating from Quarter 1 actuals.

Resale fees were \$5 below Budget levels in March (2 homes sold). YTD, we are \$7K below Budget. After a brisk 2021, Q1 may reflect slowing sales due to rising mortgage rates. We will continue to keep an eye on this situation.

The Replacement reserve is now at \$896K (after \$47K of expenditures). For the year so far, this reserve is down \$119K. However, this situation should change as greater monthly income is budgeted to the reserve for the remainder of the year. However, 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

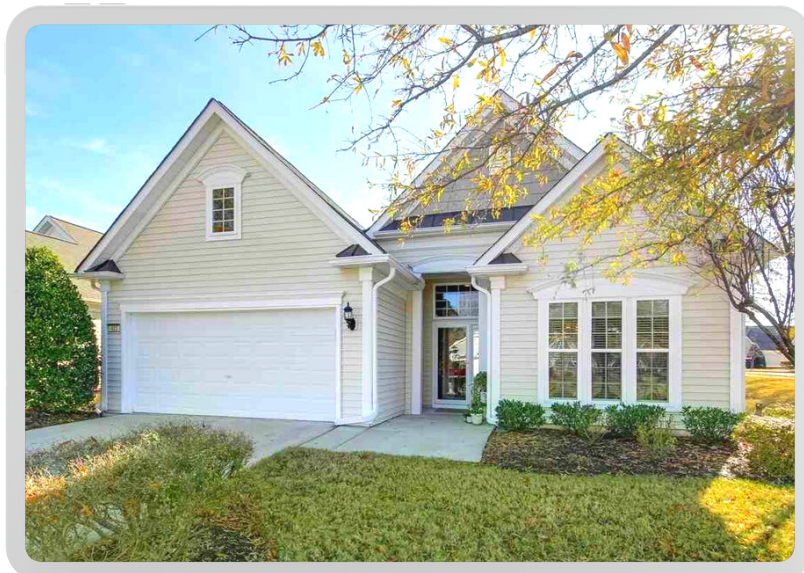
Understanding the Anomalies in the Design Guidelines

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 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
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 Community Meeting

May 3 | 6:30 pm

GoToWebinar



HOA Board Meeting

June 21 | 10:15am

GoToWebinar

