

OCTOBER 2022 ISSUE XXXV

# CAROLINA PRESERVE

HOA NEWS

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## OUTDOOR SOCIAL SPACES



With cooler temps, it's time to enjoy visiting in one of our beautiful outdoor social spaces. Grab a food truck dinner and eat al fresco, meet friends for a beverage or play cards at The Gathering Place. It's our time to enjoy.



# HOA President's Comments

*by Judy Nixon*

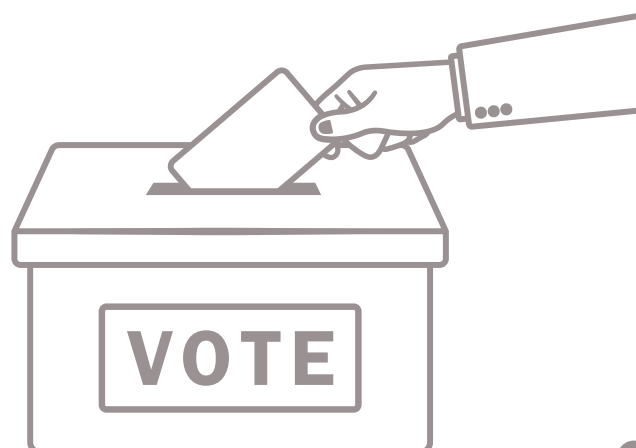


Looking at everything that will be happening in October, residents need to get out their calendars and start scheduling! Board candidates, Jeff Diton, Bob Griffith, David Jackson, John Kasarda and Ron Oliveri will address the Carolina Preserve (CP) community on October 6, 2022, during the virtual Meet the Candidates forum to explain why they should be elected to the 2023 Board for two-year terms. All residents should tune in because voting for HOA Board members is an important part of a resident's community responsibility. Learn as much as you can by reading their candidate statements and written responses to questions, which are posted on the CP website under "Governance" "2022 HOA Election" and listen to their spontaneous responses to questions raised during Meet the Candidates, which will also be recorded and posted on the website. Voting will take place electronically and via paper ballot starting October 17th and end October 28th so be an informed voter.

**mark  
your  
calendar**

*October*

Next up, on October 11, 2022, is the virtual Community Budget Presentation. There will be morning and evening presentations during which Jerry Warren, Board Treasurer, will present the proposed budget for 2023-2025. During these presentations you will have the ability to ask questions and subsequently submit written comments to the Board from October 11-17, 2022, on the proposed budget. On October 18th, during the HOA Board's Open Board Working Meeting, the Board will address comments received and vote on the 2023-2025 budget. Because of current national/global economic conditions and the necessity to address repairing and replacing HOA facilities, equipment and refurbishing amenities, residents need to understand the basis for the projected budget and Board's prioritization of HOA projects. All in all, October 2022 is one of the most important months this year for you as a Carolina Preserve resident. You are being asked to be an active participant in how Carolina Preserve will move forward as to HOA Board composition and funding the HOA over the next three years. Participate. Be informed. VOTE!



Elections belong to the people. It's their decision. If they decide to turn their back on the fire and burn their behinds, then they will just have to sit on their blisters.

— Abraham Lincoln

# I Want to Know . . . Frequently Asked Questions

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

**Q: THE HOA POLITICAL SIGN RULES STATE THAT POLITICAL SIGNS CAN GO UP 45 DAYS PRIOR TO A STATE OR FEDERAL ELECTION AND MUST COME DOWN 7 DAYS AFTER THE POLLS CLOSE ON ELECTION DAY. DOES THAT MEAN I CAN PUT UP A POLITICAL SIGN 45 DAYS BEFORE EARLY VOTING STARTS?**

**A: No. All timeframes are calculated based on election day, which this year is November 8, 2022. Early voting does not change when election day is, it only applies to when voting starts.**

**Q: WHEN WILL THE BOARD OPEN THE BRADFORD HALL INDOOR POOL TO KIDS SWIM AGAIN?**

**A: Effective October 1, 2022, Kids Swim will be reinstated.**

**Q: WHY DOES THE BOARD AND LIFESTYLE KEEP TELLING US ABOUT PROGRAMS AT AMBERLY MASTER? SHOULDN'T WE HAVE THE SAME PROGRAMS HERE AT CAROLINA PRESERVE?**

**A: Carolina Preserve HOA dues include not only funding for Carolina Preserve but also Amberly Master Property Owners Association. Residents here get a “twofer” with their dues unlike other Amberly Master sub association residents. CP residents can choose between twice as many programs and various fitness skill levels that meet their needs. During the summer, the Amberly Master pool affords CP residents with grandchildren the fun pool and outdoor lap swimming for the adults. There are also indoor pickleball courts available at specified times. The Board and Lifestyle emphasize Amberly Master in addition to CP amenities because you are paying for both and should know and take advantage of all that is available to you as a CP resident.**

**Q: WHY IS THE BOARD PROPOSING CHARGING RESIDENTS TO RESERVE THE BRADFORD HALL PAVILION WHEN IT IS CONSTRUCTED?**

**A: The Bradford Hall Pavilion is considered part of Bradford Hall, subject to the same resident reservation rules and fees schedule for reserving rooms within Bradford Hall. Once constructed, the Bradford Hall Pavilion will be open to all residents without reservation until 4 pm each day. Starting at 4 pm, residents will be able to reserve the Pavilion for private functions.**

**Q: HAVE THERE BEEN OTHER BIDS RECEIVED FOR IMPLEMENTATION OF THE MAILBOX POST PROJECT?**

**A: Yes. The Task Force in addition to researching the solution to the mailbox post damage problem, also researched multiple sources for the ability to provide materials and labor to do the repairs when balanced with cost.**

**Q: WHAT IS THE COST TO REPAIR THE MARSALIS RETAINING WALL?**

**A: The short answer is we do not know the precise cost yet. The engineering plans must be drawn and approved by the Town of Cary before construction bids will be provided. We estimate, however, that the cost will be in the low to mid six figures, but again it could be higher, we just don't know at this time. While we must allocate for the entire estimated cost of repairs, we have retained a land development attorney on a limited basis to assist in hopefully negotiating some cost sharing with the Town of Cary for the repairs. Whether that negotiation is successful, is currently unknown.**

**Q: IS IT TIME TO RETURN TO IN-PERSON MEETINGS GIVEN ACTIVITIES HAVE BEEN HAPPENING IN BRADFORD HALL FOR MUCH OF 2022, AND THE COMMUNITY DESERVES TO HAVE AN OPPORTUNITY TO GATHER TOGETHER TO ASK QUESTIONS AND BUILD MORE COMMUNITY INVOLVEMENT?**

**A: The Board agrees that the community deserves the opportunity to gather together and ask questions, thus building more community involvement. That has never been in doubt. The Board, however, recognizes from other residents' input and comments that during 2022, many still do not feel comfortable attending meetings at Bradford Hall, despite it being fully open and activities taking place. The virtual meetings have provided significantly more residents the opportunity to attend Board meetings and ask questions than in-person meetings have in the past. The Board has further expanded the audience by recording the meetings for later viewing, an option that is not currently available with in-person meetings. Disseminating information to the largest number of residents in the community is the Board's primary goal. We understand other residents' desires to attend in-person meetings and hope to reinstitute in-person meetings in the near future.**

# CP NEWS IN BRIEF

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October 2022

MONTHLY UPDATES

Vol 1 Issue 9

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## ELECTION RELATED POLITICAL SIGNS:

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November 8, 2022, is election day and it is important to know the HOA rules pertaining to political signs. For those new to the community and as a reminder to other residents, the Carolina Preserve Declaration of Covenants was amended on April 9, 2021, to address, among other things, when political signs can go up and must be taken down and what constitutes a political sign. In pertinent part, Amendment 7, Exhibit C (j)(v.) of the Declaration states:

A political sign may only be posted 45 days before a state or federal election in which citizens of Wake or Chatham Counties are generally permitted to vote and must be removed within seven (7) days after the close of polls on election day. Political signs may be placed only in a mulch bed within an Owner's Lot. The Association will permit up to five (5) political signs with the maximum dimensions of 24 inches by 24 inches each to be placed within a mulch bed on a Lot unless any applicable town or county ordinance that regulates the **size and number of political signs on residential property** allows more signs or larger signs, in which case the ordinance shall control. (Emphasis added).

"Political sign" means a sign that attempts to influence the outcome of an election, including supporting or opposing an issue on the election ballot. The term "sign" refers to any sign, poster, banner, flag, except for the American or North Carolina flags, placard, billboard, balloon, or similar object inscribed with words, designs, marks, or graphics that is displayed to or visible by the public. More information can be found in the Design Guidelines, Sections 4.15 and 4.31.3 and Amendment 7 to the Declaration of Covenants, all of which can be found on the CP website.



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## 8TH AMENDMENT TO THE DECLARATION OF COVENANTS VOTING RESULTS:

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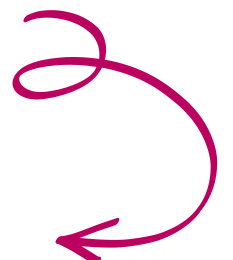
Voting took place August 15-31, 2022, to determine whether to amend the Carolina Preserve Declaration of Covenants to address residents' concerns about rental properties here at CP. The vote turn-out was phenomenal with 70% of homeowners voting. To pass the 8th Amendment, it required 67% or 912 homeowners voting "yes." The results were: 881 (65%) "yes" votes, 77 (6%) "no" votes and 402 (29%) homeowners did not vote at all. The 8th Amendment did not pass but the results showed an active resident engagement of 70%, which is an achievement regardless of the outcome. The community spoke and the Board will honor that vote.

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## CAROLINA PRESERVE CIVILITY PLEDGE:

For those not familiar with the CP Civility Pledge, it is one of the many attributes that sets Carolina Preserve apart from other HOAs. It is our community's pledge to respect the diversity of opinions and perspectives within CP. It is an acknowledgement that the vibrancy and strength of our community is the result of civility towards one another, even if we hold differing viewpoints. It is a commitment to be familiar with HOA rules, regulations, and governing documents to avoid misunderstandings about the HOA, Management Company, and residents' obligations and responsibilities. Why is this important? Over the past year, some, but not all, residents have forgotten the foregoing. Management staff implements Board policy and is responsible for maintaining HOA common areas, facilities, and amenities. There are 1,360 homes and over 2,200 residents here in CP and sometimes addressing issues can take some time so please be patient. The HOA Board is responsible for the overall management of the HOA to protect property values and improve and maintain existing facilities and amenities, among others. Not all resident issues are HOA or management issues. Please remember, civility and respect are two-way streets, for which everyone is deserving. The Civility Pledge can be found on the CP website homepage and on a poster board at Bradford Hall outside the Wall Street Room for more information.

[Click here to read](#)



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## **HOA BOARD STRATEGIC PLANNING PRIORITIES:**

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During the month of April, residents, real estate agents and Kuester staff provided suggestions and input about how to improve and enhance Carolina Preserve over the next three years. During the May 3rd Board Community Meeting, those suggestions were presented to the community. Since then, the HOA Board has prioritized strategic plan projects based on a cost benefit analysis focusing on budgetary constraints and if the projects will benefit or impact the most CP residents, rather than just some. Some strategic plans initially considered had to be moved to later years based on the foregoing. The Board's focus is on repairing, replacing, and refurbishing existing facilities and amenities, such as resurfacing the indoor pool and spa, renovating the main level locker rooms, replacing Bradford Hall HVAC units over the next several years and implementing green initiatives whenever possible. The Board also is going to address revamping the CP website to make it more user friendly, intuitive, and current, updating CPs social media presence, externally and internally, and modestly increase the Lifestyle budget for more resident activities. The final 2023-2025 Strategic and Budget Plans will be posted to the website at the end of this year.

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### **"KIDS SWIM" AT THE INDOOR POOL IS BACK!**

Effective October 1, 2022, "kids swim" will be reinstated at the indoor pool. A schedule will be created and sent out soon. Thank you for your patience.

# 2022 Financials at A Glance

## Operations (\$000's)

	August YTD			Full Year
	Actuals	Budget	B/(W) Budget	Budget
Income	2,788	2,797	(8)	4,194
Uses				
Reserves	(394)	(394)		(616)
Expenses	(2,316)	(2,400)	83	(3,563)
Net	78	3	75	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	285	2	82	25	78	472
Interest	3	1				4
Expenses	(290)	(7)	(14)	(49)		(360)
8/31/2022	1,014	299	110	41	606	2,070

By Jerry Warren, HOA Treasurer



# Treasurer's Comments

By Jerry Warren, HOA Treasurer

August income was \$352K, \$3K under Budget with lower resale fees. Expenses were \$7K over Budget with higher landscape expenses (\$14K work on retaining walls and trees & shrubs) and insurance expenses (\$3K delayed from July), offset by lower maintenance expenses (\$6K) and utilities (\$4K electricity and water). This resulted in a monthly loss of \$9K, \$10K unfavorable to Budget for August but \$75K favorable YTD. Our re-forecast for the year shows that a portion of this YTD favorability will be reversed as the year progresses when some delayed spending occurs. In addition, the recent increased inflation in the country is beginning to affect our finances. Bids are currently coming in from area landscaping companies for a new 3 year contract starting January 2023; this contract represents a large portion of Carolina Preserve's annual budget.

Resale fees, although still a reasonably good sales month, were \$3K below Budget in August as mentioned above (5 homes sold). We are \$23K below Budget on a YTD basis. So far there have been 5 resales in September month-to-date.

The Replacement reserve is now at \$1,014K, up \$25K from last month but down \$2K for the year. We still need to keep in mind the unknown cost of the Marsalis project. Engineering has started and the costs of the project are exclusively those of Carolina Preserve and appear to be larger than originally anticipated. We also have some major repair projects anticipated for the 4th quarter such as the Bradford Hall indoor pool and locker rooms.



# LAC Autumn Daze

By Antonia Pinckney, Lifestyle Advisory Committee

The Lifestyle Advisory Committee (LAC) Autumn Daze Event was held on September 24 under a beautiful fall sky. The event included lawn games, demonstrations of tennis, pickleball, bocce and disc golf. This gave residents a hands on chance to see the facilities and learn from our enthusiasts.

Afterwards we were treated to a concert from some of our musical groups including the Veteran's Chorus, Doo Wop and CP Trio groups. To top it off, we had the Veteran's Food Truck grilling to order for us.

A big thank you to the athletes, performers, volunteers and all who participated.



# ARC Makes it Easy For You

By Ken Merten, *Architectural Review Committee*

If you are a new homeowner or are considering a change to the exterior of your home or yard for the first time, please pay close attention.

All the information you need to submit a Modification Request for ARC's approval can be found in the Design Guidelines, which are on the CP website. Start with "Governance", then "CP Documents", then "ARC Design Guidelines". The Guidelines can be a bit overwhelming at times, but please take the time to search for the applicable information for your project. If questions remain after your investigation, that's the time to email ARC for additional help. ARC is more than willing to assist, but doing your homework first will expedite the processing of your request.

All too often, ARC is 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 shortcomings and assign ARC members to follow up with homeowners that have incomplete information. Actually, ARC receives the list of MRs from Kuester two days before the Friday meetings, so that each member of ARC can read through the MRs looking for problems. 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. Paying close attention to the "MR Requirements" in red at the bottom of each Guideline is essential.

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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# The Signpost and Mailbox Post Improvement Task Force Update

## It's All About Curb Appeal

*By Ted Young & Sharon Valvona*

The Signpost and Mailbox Post Improvement Task Force has repaired approximately ninety street signposts in CP and concluded an investigation and piloting of solutions to repair unsightly string trimmer damage on mailbox posts. As announced at the September 19 Board Community Meeting, the Board has approved the Task Force recommendation to install Fence Armor metal sleeves on all mailbox posts that are not already protected by gardens or other protection devices. Households with gardens around their posts may request painting or a Fence Armor installation with the appropriate garden damage waiver form.

This is a one-time assistance by the HOA to address string trimmer damage and to reset curb appeal before the 2023 mowing season for landscaper accountability under the new contract. The HOA will cover the cost of materials and installation by a local company.

Homeowners will continue to be responsible for future mailbox visual and structural upkeep and may contract with the same company if they choose. Work is expected to begin this Fall in Section-1. Residents will shortly receive a Task Force email with more detailed project information, a link to Frequently Asked Questions (FAQ) answers and an email address where residents can submit questions.





# Getting to Know Your Kuester Staff

By Tom Crotty

Over the past three years, over 260 homes have sold and Carolina Preserve now has between 260 to 400 new residents. COVID also brought isolation and fewer residents visiting Bradford Hall and meeting the staff. The Board plans to introduce all our Kuester employees to the community by profiling one staff person each month. The employee profile will provide background information on experience, qualifications, certifications, roles, and responsibilities. We have a small staff therefore our staff wear multiple hats. The Board hopes this will provide informative information to our residents about our staff and their responsibilities.

## Introducing Christine Hast, our Carolina Preserve General Manager

Born and raised in Pittsburgh, PA, Christine is one of six children. She received a BA in Social work and psychology from Seton Hill College, now Seton Hill University in Greensburg, PA in 1979. Her first career job was as a hospital caseworker at Westmoreland Hospital in Greensburg, after which, she made a move to a more challenging position with the Pennsylvania Bureau of Vocational Rehabilitation where she performed psychological and vocational testing, rehab, and counseling. Due to Insurance changes and state funding cutbacks for social services, in 1992 Christine transitioned to property management, managing State and Federal Section 8 and HUD affordable housing until December 2009 when she relocated to North Carolina to be closer to her son and daughter who made North Carolina home for their careers.

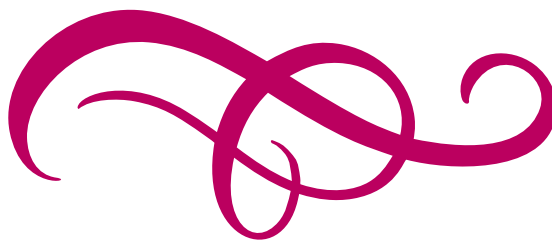


**CHRISTINE HAST, CMCA, AMS**

General Manager

Christine's management experience took her in a new direction of property management, to Homeowners Association management. As a portfolio manager she managed 13 different HOA communities at the same time. While a portfolio Manager, Christine joined Community Association Institute (CAI) and through their continuing education programs, earned her Certified Manager for Community Associations (CMCA) and Association Management Specialist (AMS) designations and certificates. She came to Carolina Preserve in 2015, as the onsite Assistant Community manager, then Community Manager and on to General Manager. In 2019, she received from (CAI) the Management Excellence award and Carolina Preserve won the Community of Excellence award. Christine continues to further her education and has attended TOC Storm Water seminars, Law seminars and several CAI classes. These classes and seminars are required to maintain her (CMCA) and AMS Designations and to stay on top of issues that affect Homeowner Associations to ensure she is a knowledgeable and effective General Manger for Carolina Preserve.

The Carolina Preserve HOA Board sets the rules, procedures, budget, and strategic plans. Christine and her staff focus on HOA Operations, managing the operational budget, vendors, contractors, maintaining the amenities, and all operational issues, to implement those plans.



# 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 Stolzenhaler | 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: Terrie Murray

# 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 Meet the Candidates  
**October 6 | 6:30pm**  
GoToWebinar



2023 Budget Review  
**October 11 | 10am & 6:30pm**  
GoToWebinar



HOA Open Working  
Board Meeting  
**October 18 | 10:15am**  
GoToWebinar



HOA Annual Meeting  
**November 21 | 6:30pm**  
GoToWebinar