

DECEMBER 2022 ISSUE XXXVII

CAROLINA PRESERVE

HOA NEWS

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INDOOR WINTER FITNESS



Winter weather makes outdoor strolls, hikes and bike rides a bit more challenging. Luckily there are indoor fitness options as well. Stop by the fitness center, take a group fitness class, or swim some laps. Let's keep moving CP!



HOA President's Comments

by Judy Nixon



December caps an eventful year here at Carolina Preserve (CP). The community gathered to engage in strategic planning for the next three years. The Beckingham Loop Park Task Force developed and presented a plan to enhance the Beckingham Loop Pocket Park for everyone's enjoyment, which is currently being implemented. The GOTV Task Force pounded the pavement during the blistering summer heat to encourage residents to vote on the proposed 8th Amendment. The Street Signpost and Mailbox Post Task Force developed a viable solution to repair and prevent damage to those posts from landscaping trimmers, thus enhancing CP's curb appeal. A new landscaping company will begin in January 2023, focused on improving services and CP's appearance. Plans are being drafted to convert the Yates/Del Webb fountains to sustainable landscaping. The Bradford Hall fountain was repaired, and the Pavilion is well on its way to completion. Community participation increased substantially in providing input to HOA Board proposals such as adding pickleball courts, addressing CP rental property concerns and electing resident volunteers to the 2023 HOA Board. 2022, however, also presented challenges to address aging infrastructure, such as the indoor pool and spa conditions, main level men and women's locker rooms, and nature's impact on the Marsalis retaining wall collapse, to name a few.

But whether addressing challenges or new projects, the CP community has risen to the occasion. While some outcomes were not what some hoped, CP residents engaged actively and had a voice in those outcomes. There was record voting on the 8th Amendment to the Declaration of Covenants and the 2023 Budget. Residents volunteered to run for the HOA Board and the community elected four 2023-2025 Board members. Resident attendance at Board Open Working and Community Meetings has increased substantially. One of my early articles focused on “community” and recognized that Carolina Preserve’s success is derived from residents’ participation and engagement. 2022 is evidence of CP residents’ commitment, which has enhanced and made the CP community stronger. On behalf of the 2022 HOA Board, thank you for your community participation and we wish everyone a very safe and peaceful holiday season. See you in 2023!



I Want to Know . . . Frequently Asked Questions

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

Q: WHY DO THE BALLOTS FOR RATIFYING THE BUDGET REQUIRE SIGNATURE AND ADDRESS? WHY AREN'T THEY SECRET BALLOTS?

A: The ballot requires a signature and address for two reasons. The first is to ensure that only one vote is submitted per household. The second reason is that the submitted ballots are used to establish a quorum for the Annual Meeting and as ballots are submitted, the General Manager checks off the homeowner's name and address towards that goal. How a homeowner votes is never posted anywhere. Only the total vote numbers are presented.

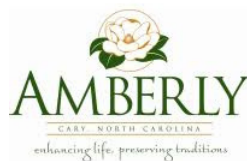
Q: RESURFACING THE BOCCE COURTS DOES NOT APPEAR TO BE INCLUDED IN THE 2023 BUDGET. IS THE HOA GOING TO MAINTAIN THE BOCCE COURTS AND RESURFACE THEM AT ANY POINT?

A: The resurfacing of the bocce courts was deferred to 2024 due to monetary limitations. It can be seen in the Budget Presentation within the Replacement Reserve slide for \$45,000. In the meantime, although not itemized, all ongoing maintenance of the bocce courts will go through operating expenses within Common Area Maintenance and Repair.

Q: WHY ARE CP RESIDENTS REQUIRED TO PAY FOR FITNESS CLASSES AT BRADFORD HALL AND YET THE CLASSES AT AMBERLY ARE PROVIDED FOR FREE. ALL THE OTHER FITNESS SERVICES OFFERED I.E., TENNIS, PICKLEBALL ETC., AT BRADFORD HALL DO NOT INCUR A FEE. WILL THE HOA BOARD CONSIDER PROVIDING FITNESS CLASSES AT CAROLINA PRESERVE FOR FREE?

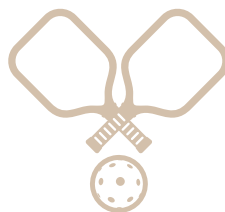
A: A number of residents have asked about the possibility of eliminating the fees for our individual exercise classes. Currently there is a nominal charge for each fitness class offered through the HOA that, as well as offsetting the cost of providing the instructor, assures that we will get the expected turnout. The fee is far less than one would pay if going to a private gym. Some of our clubs do offer beginner's classes for free, but these are provided by resident volunteers.

There is also a question as to why CP can't offer free classes when Amberly can. Amberly Master has a large separate lifestyle contract that includes the costs for classes and instructors. Our master association dues help pay for this contract, so Amberly classes are not free; they are paid for in a different manner. Because of this, CP residents should take advantage of Amberly classes; Carolina Preserve is part of the Amberly Master Association and CP residents' recreational, social, cultural and other opportunities are double that of any other sub-association within Amberly Master. This is not to say that the Board shouldn't consider this request but, given the current financial priorities with expenses rising in all operational and infrastructure facets, now is not the time to add more costs to our Budget and CP HOA dues. Therefore, the Board is tabling this idea for the time being.



Q: WHY DOES CAROLINA PRESERVE HAVE A PROBLEM WITH THE EXCESS MONEY THEY HAVE YET THEY WILL NOT ENTERTAIN THE ADDITION OF A PICKLEBALL COURT?

A: The Board has entertained adding pickleball courts. At the Spring Board Community Meeting, a proposed plan was presented to the CP community for adding two pickleball courts near the existing tennis courts. The Board requested feedback from the community about undertaking that project. Though there was substantial support for the project, there were even more residents who did not and do not support the expenditure for additional court(s) assuming the HOA had the necessary reserves. The Board at that time, planned to pursue a feasibility study of adding one pickleball court but that plan was tabled due to more immediate fiscal demands. As was explained during the October Budget presentations, increased costs due to inflation, unanticipated Stormwater costs that are four times the budgeted amount and a very expensive Marsalis project mean that Carolina Preserve does not currently have the necessary resources to undertake such a project. This information was provided to the Pickleball Club Board at a meeting on September 27, 2022, as a courtesy and out of respect for all the good work the Pickleball Club has done in promoting pickleball here at Carolina Preserve.



CP NEWS IN BRIEF

December 2022

MONTHLY UPDATES

Vol 1 Issue 11

2022 CAROLINA PRESERVE ANNUAL MEETING

The virtual 2022 Annual Meeting of Carolina Preserve took place on November 29, 2022. The Annual Meeting had to be rescheduled from its original date of November 21, 2022, due to a delay in mailed hardcopy budget/annual meeting packets being delivered to residents. Because the packet printing and mailing process was undertaken by a third-party vendor, the Board has initiated an inquiry into why and where the delay took place. Based on what is learned, the Board will take steps to avoid the problem in the future. We regret having had to reschedule the Annual Meeting and we understand the rescheduling possibly affected some residents' and clubs' plans, but it was unavoidable given the firm deadlines for notifying residents regarding 2023 HOA dues. If you were unable to attend the Annual Meeting, it was recorded and can be viewed on the CP website. After viewing the recording, please do not hesitate to contact the Board with your comments or any questions you may have at HOA.Board@cpamberly.net. The HOA Board is grateful to CP residents for their patience and understanding.

2023 BUDGET RATIFICATION RESULTS:

There were 448 ballots submitted, which constituted a quorum for the Annual Meeting. In looking at the below results, some ballots did not include votes on all topics. Therefore, the below results are not a 1:1 correlation with the total number of ballots submitted. The results are as follows:

| | | | |
|--|-----------|----------|----------|
| Approving the 2021 Annual Meeting Minutes: | Yes - 278 | No - 21 | APPROVED |
| Approving IRS Sec. 70-604: | Yes - 408 | No - 30 | APPROVED |
| Ratifying 2023 Budget: | Yes - 316 | No - 124 | RATIFIED |

Effective January 1, 2023, HOA dues will be \$287.00/month non-villas and \$307/month for villas. Thank you to everyone who voted.

BRADFORD HALL INDOOR POOL, SPA AND DECK RESURFACING:

After reviewing bids submitted for the resurfacing of the indoor pool, spa and decks for the indoor and outdoor pools, the Board awarded the contracts to Pool Professionals and Concrete Transformations. Work is projected to begin on the indoor pool, spa and indoor decking in early to mid-January. The outdoor pool decking is projected to be done before the outdoor pool opens in 2023. While work is underway, the indoor pool and spa area will be closed. Residents will be notified in advance of the indoor pool area being closed. The work is estimated to take a couple months from start to finish. Some residents have suggested that the work be done when the outdoor pool is open, so CP residents still have a pool available. The Board considered that option, however, we decided the work should be done as soon as possible for a couple of reasons. First, just the overall condition of the indoor pool and spa needs to be addressed sooner than later. More importantly, some of you may not be aware, but Bradford Hall's HVAC system design uses recirculating water from the indoor pool, which must be drained for work to take place. As a result, if the work is done during the summer, the Bradford Hall Ballrooms would not be air conditioned and there would be no way to adequately address the lack of air conditioning other than closing those rooms. On the other hand, during the winter, it is much more feasible to place space heaters in those affected rooms, if necessary, and they can continue to be used. If all goes as planned, hopefully by the early Spring it will be like there is a new indoor pool and spa with attractive decking and well worth the temporary inconvenience.

BRADFORD HALL PAVILION

It's been a long time coming, but the work of the Bradford Hall Backyard Task Force is coming to fruition. Construction is underway and soon we will have a Pavilion!! Now residents can have a covered area to enjoy each other's company near Bradford Hall and all its amenities; whether having a picnic lunch, get together, party or waiting to play bocce, tennis or pickleball. After 4:00 pm every day, residents, clubs, or groups can reserve the Pavilion but not more than 90-days in advance. Be sure to consult the CP Facility Use Policy regarding Bradford Hall Pavilion reservation requirements. We hope the community enjoys and takes advantage of the newest addition to CP amenities.

THE SIGNPOST AND MAILBOX POST IMPROVEMENT TASK FORCE (SMPITF) UPDATE:

As reported in the October HOA eNewsletter and in an October 17th email blast to all Carolina Preserve residents, the SMPITF, aka the Mailbox Task Force, kicked-off its project for installing Fence Armor metal covers at the base of mailbox posts in late October. Since then, Task Force members have been coordinating the contractor's work and inspecting each installation. All of Landscape Section 1 is complete as is almost all of Section 2. Almost 300 covers have been installed. Prior to work starting in each subsequent section, an email will be sent to residents in that section explaining the timetable and how they can get ready. A list of [Frequently Asked Questions](#) is available to provide the "why, how and when" for this effort. Work will slow down during the winter months because the paint cannot be applied when the temperature is below 50 degrees. The target project completion date is the end of April, 2023. Please send questions to the Task Force at mailboxtaskforce@cpamberly.net. Stay tuned for future updates as the project progresses. And walk around Section 1, where work has been completed, to see the improved look these covers will make.



Click the mailbox
to access the FAQs



2022 Financials at A Glance

Operations (\$000's)

| | October YTD | | | Full Year |
|----------|-------------|---------|--------------|-----------|
| | Actuals | Budget | B/(W) Budget | Budget |
| Income | 3,493 | 3,504 | (12) | 4,194 |
| Uses | | | | |
| Reserves | (507) | (507) | | (616) |
| Expenses | (2,896) | (2,998) | 102 | (3,563) |
| Net | 90 | 0 | 90 | 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 | 396 | 4 | 82 | 25 | 90 | 597 |
| Interest | 5 | 2 | | | | 7 |
| Expenses | (322) | (7) | (20) | (49) | | (398) |
| 10/31/2022 | 1,095 | 302 | 104 | 41 | 618 | 2,160 |

By Jerry Warren, HOA Treasurer



Treasurer's Comments

By Jerry Warren, HOA Treasurer

October income was \$355K, \$7K over Budget with higher resale fees (\$7K). Expenses were \$1K under Budget with lower maintenance (\$5K), Lifestyle (\$4K), and management (\$3K) expenses, offset by higher landscape expenses (\$4K), legal fees (\$2K), and a \$5K retainer for the firm that will be doing our replacement reserve study in a few months. This resulted in a monthly income of \$5K, \$8K favorable to Budget for October and \$90K 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.

Resale fees were \$7K above Budget in October as mentioned above (8 homes sold), making up some of the previous resale shortfall. However, we are still \$21K below Budget on a YTD basis. So far there have been 4 resales in November month-to-date.

The Replacement reserve is now at \$1,095K, up \$41K from last month and \$79K 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.



ARC Makes it Easy For You

By Ken Merten, Architectural Review Committee

Are The Design Guidelines Confusing or Intimidating for You?

During the winter months when projects around the outside of your home are on hold, it's a good time to do some exploration of the Design Guidelines. While ARC makes numerous revisions to help clarify or more easily understand the Guidelines every few years, we are clearly aware that it is difficult for many of you to find the answers that you are looking for. So, on some of those cold, boring days, keep your mind active while becoming more familiar with the intricacies of the DGs.

Keep in mind that ARC is the resource you need, not Management or Kuester or the Front Desk. Everything you need including forms is on the Community website under "Governance", "CP Documents", "ARC Design Guidelines". In addition, Fast Track and Modification Request forms are available at the Front Desk. Check it out and simplify your next project.

Here are some helpful hints:

Start with section 1.4 BEST APPROACH TO REVIEWING DESIGN GUIDELINES. This will help you navigate the DGs in the easiest way.

Then move on to sections 2.2 ITEMS WITH NO APPROVAL REQUIRED; 2.3 ITEMS ON FAST TRACK APPROVAL; AND 2.4 PROHIBITED MODIFICATIONS. This provides a good foundation as to what you can and cannot do, and will form a solid background for moving on to research the particular project that you are considering.

Next, when looking at the index, keep in mind that everything in section 3 deals with landscaping and everything in section 4 deals with modifications to the residence structure. This will save time so you aren't looking for a structural project in the landscape section.

Many of you already know that ARC encourages communication with ARC, BUT only after your due diligence with the DGs. If you ask ARC a question before researching the DGs, we will simply direct you back to the proper section of the DGs for you to look for the answers. If questions remain, then contacting ARC is encouraged. ARC always has a member "on call" to respond to questions.

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.

Just What Is This Thing Called CGAC?

By Joel Glassman, Club & Group Advisory Committee

There is an acronym here in Carolina Preserve that many have seen but may not be able to say what it stands for. Others may know what it stands for but may not know exactly what it does. Sometimes, even the committee members even have confusion as to what it actually should be doing. It is called the CGAC and stands for Club And Group Advisory Committee.

The CGAC will be entering the 5th year of existence in 2023. We meet once per month on the second Tuesday in the morning. Our main mission is to act as a liaison between the clubs and the HOA Board, support the strategy of the Strategic Plan of the Board, to provide advice to the Board and Lifestyle Director on club issues, to facilitate communication and to support the clubs through making recommendations to the Board. The Board may request us to take on a task at any time. One thing we do know is that we will be looking for volunteers to be on our committee.

We assist the HOA Board by updating the Club Manual and Facilities Use Manual every other year and have made recommendations for changes when we hear of something that may need to be changed. Many of these recommendations come from our experiences with our club's activities and meetings, results from our survey and when we receive feedback and questions from the clubs. The Board has the final say on whether to adopt the recommendations. One of these was the development of an "insufficient funds" section to the club manual in case a resident passes a check that winds up not being covered. This mainly happens because most clubs do not cash checks that are received for an event until after the event occurs. When we started, we helped to develop the method of clubs scheduling their events for the coming years to make things fair to all clubs.

We have also assisted clubs with a specific problem that they may have by working with our Lifestyle liaison in developing suggestions as to how to best solve that problem. The CGAC has published an article to assist clubs in recruiting volunteers which has been challenging for all clubs. We have taken over the responsibility for organizing and running the Club Expo which had a dramatic increase in both participation and attendance this year. Clubs have always been welcome to send us suggestions and one led to the development of a training module to learn how to use the audio-visual equipment and lighting in the ballrooms. We have also listened to suggestions to upgrade the sound system in the ballrooms, assignments of storage spaces to the clubs and to improve recycling during events.

The CGAC has 9 members and some cycle off each year. We hope that some residents will want to join us in our efforts- either next year or in the near future. Watch for an announcement of an open meeting in December 13th where you can learn more about us, meet some of the committee members and even enjoy some refreshments. If you are interested in joining us, please email Cindy Jackson at cgac@cpamberly.net.

Thanks and Happy Holidays From Your Club and Group Advisory Committee.



Getting to Know Your Kuester Staff

By Tom Crotty

This space will continue to introduce our Kuester staff over the next several months. The board hopes this will provide informative information to our residents about our staff and who does what.

Introducing Terrie Murray, our Carolina Preserve Lifestyle Director.

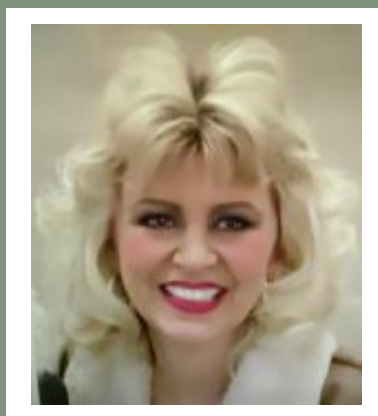
Terrie Murray was born and raised in the small town of South Boston, Virginia. She attended Danville Community College after high school and studied Business and Marketing. Her interest in travel led her to attend Southeastern Academy (school of Travel and Tourism) in Kissimmee, Florida where she studied all aspects of the Travel Industry. After graduating, Terrie moved to the Raleigh area where she has family and better job opportunities.

Terrie's spent thirty years in the Travel Industry spanning leisure travel, corporate travel, office management, and finally got into event and meeting planning for large pharmaceutical companies. In 2015 she moved into Community Management.

Terrie started working at Carolina Arbors in Durham before the Clubhouse even opened to the community. She managed the Front Desk and did administrative work and then was promoted to Assistant Lifestyle Director. Terrie came to Carolina Preserve in October 2021 as the Assistant Lifestyle Director. Her role here as Assistant Lifestyle Director has been mainly working with the Clubs and Groups. In this role Terrie receives and enters the information on all club charters, maintains all the distribution lists, responsible for Club and Group news for the weekly newsletter, sending email blast to the community from clubs and groups, handled deposits and reconciliation reports, and the monthly club financial collection reports. She also manages and oversee the weekly Saturday Matinee Movies, the sandwich boards, and bulletin board. Terrie also manages website updates for the club website pages.

TERRIE J MURRAY

Lifestyle Director



In August 2022, Terrie was promoted to Lifestyle Director and took on an expanded new role. Some of the new duties include the following:

- Create and deliver a welcome program and orientation for new owners.
- Facilitating and managing the resident activities. (Identify and promote activities that encourage participation by various age groups).
- Create the weekly Lifestyle Newsletter.
- Identify and promote activities that encourage participation by various age groups. Involve owners in lifestyle planning and implementation of activities and events.
- Plan and set up groups, clubs, picnics, socials, and other community wide events.
- Encourage and develop volunteers to set up and lead committees, groups, clubs, etc.
- Involve owners in lifestyle planning and implementation of activities and events
- Develop, plan, and implement enjoyable programs to promote fitness, wellness, cultural activities, and social activities for residents that enrich the quality of life, enhance the vibrancy of the community, and live up to Del Webb standards.
- Maintain a calendar of events, sign up lists, and generate promotional materials as needed.
- Maintain record of residents' attendance at Lifestyle functions to analyze program's success.
- Building partnerships with local vendors and organizations.
- The management company's liaison for the Lifestyle Advisory Committee (LAC).
- Solicit sponsorships for community events.
- Assist with Private Events, Block Parties, and Rentals.
- Assist in management of facility resources.
- Assist residents with the Community Website (Club Express).
- Assist in compiling information to create marketing tools.
- Maintaining and filing of event documents and forms.

As you can see Terrie has many roles and responsibilities. Carolina Preserve is very fortunate to have such a skilled professional in such an important role. So next time you visit Bradford Hall and see Terrie say hello.

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 Board Meeting
December 20 | 10:15am
GoToWebinar

