



February 2023 XXXIX
Carolina Preserve
HOA NEWS

INSIDE THIS MONTH'S ISSUE:

- Carolina Preserve's 2023 Diamond Award 1**
- HOA President's Comments 2**
- I Want to Know FAQs 3 - 5**
- CP News Brief 6 - 8**
- Financials At A Glance 9**
- Treasurer's Comments 10**
- ARC Makes It Easy For You 11**
- ARC Submissions 12**
- Getting to Know Your Kuester Staff 13 - 14**
- Committee Members 15**
- Board Members 16**
- Mark Your Calendar 16**



CAROLINA PRESERVE

Congratulations!

2023
**DIAMOND
AWARDS**

A RARE HIGH LIFESTYLE
MIDTOWN
carry
LIVING
A WESTERN WARE LIFESTYLE





HOA President's Comments

by Judy Nixon

The Oxford Dictionary defines a volunteer as "A person who freely offers to take part in an enterprise or undertake[s] a task." Volunteers perform an important community service for all CP residents by donating their talent and time to improving our amenities and making Carolina Preserve the award-winning community it is. Currently, Carolina Preserve is experiencing reduced volunteerism and needs residents to engage and participate in community service. For example, going into 2023, there were only five residents who volunteered to run for four seats on the 2023 HOA Board. At least two significant clubs dissolved because no club members volunteered to act as officers even though members enjoyed the clubs' activities. Some standing committees while fortunate to have many volunteers remain, need new ideas and energy from new volunteers. The depth of talent and energy in the CP community is enormous, but we need more residents to contribute their talent and energy to the CP community.

Many residents look to the HOA Board to do something to attract more volunteers, but what can be done? The Board asks you, the residents, what can you do? You are the community. You are the energy that drives the community forward. The HOA Board counts on residents wanting to make and keep Carolina Preserve an active community, consistently striving to be better for everyone. Learn about volunteer opportunities available by going on the website and reading about the standing committees' missions. Learn about clubs and groups, join those of interest and volunteer to be an officer. Or, if you don't see something you like, start your own club! It's easy to do and there are plenty of resources available to help. When announcements for volunteers go out for committees, task forces, clubs/groups, or to run for the HOA Board, please volunteer. To those of you who give freely of your time and labor, Carolina Preserve is grateful for your community service. We also invite new volunteers and welcome your talent and energy in making Carolina Preserve a great place to live.

I Want to Know... Frequently Asked Questions

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

Q: I own property in Carolina Preserve but rent it out. Why can't I use CP amenities and invite guests if I own CP property?

A: Carolina Preserve amenities are for the use of CP residents, i.e., use is tied to occupancy of CP properties. When you rent your property, the tenants occupy the property and are therefore the residents entitled to use CP amenities and invite guests, subject to CP guest policies. Please refer to Section 10.2 of the Declaration of Covenants and Section 3.1 of the Facilities Use Policy for more information.

Q: Does Carolina Preserve have a process in place to ensure that only residents are given the lock combinations to the pickleball and tennis courts?

A: Yes. The front desk staff are instructed to verify through the ID system that the individual requesting the combination(s) is a resident.

Q: I tried accessing the new court reservation system through the resident services link and it took me to the old system. Will this be corrected/updated?

A: This has been corrected and the new court reservation system can now be accessed through the resident services tab on the website. Because it is a new reservation system, there will be some tweaks that will need to be made. This was one of them and was identified as a result of your question. Thank you for bringing it to our attention.

FAQS continued...

Q: Why is the landscaping company not responsible for cleaning drain grates given the advanced age of some CP residents?

A: When residents purchase or rent property here in Carolina Preserve, which is an active adult community, they agree they are subject to all the covenants and restrictions contained within the community's governing documents. That includes Exhibit E to the Declaration of Covenants and the Storm Water Management Policy, which provide that residents are responsible for the upkeep of their property. Landscapers must exercise due diligence and not block grates when they blow leaves and install mulch and pine straw, but that is the extent of their responsibility. Keeping grates clear of leaves, mud and debris, often only takes a broom to sweep it clear.

Q: I'd like to understand why all the windows to the pool have been covered so that the residents can't see the progress that is being made to our pool? It is a well-known fact that communication is VERY important. If residents were informed it would greatly increase our understanding and cut down in the individual responses needed. Only after asking (and I know that I was not the only one asking) was I told that the chemical level of the water needed to be correct in order to drain the pool - this is information that should have been communicated. Next steps also need to be communicated to Residents as construction progresses and we should be allowed to see the progress.

A: The windows are covered to protect the glass from getting chipped or broken while work is being done. Information has been provided to the community via the Open Board Working Meetings and the HOA Newsletters about the nature and scope of the necessary pool work. For example, the January HOA Newsletter specifically detailed the work that was going to be done and explained why it would take two months to complete. In the January Open Working Board Meeting the Board President covered the topic of the chemical level in the pool water before it could be drained. The Board agrees communication is important, but residents also have a responsibility to keep informed through the communication the Board makes available to the community.

FAQS continued...

Q: When will the pool work be completed and the indoor pool and spa reopen?

A: The indoor pool and spa work has only begun. As has been reported during Open Board Working Meetings and the HOA Newsletter, the work is projected to take at least two months, through March. Please refer to the January and February HOA Newsletters as to the specific work required and why it will take at least two months to complete.



CP News in Brief

February 2023

MONTHLY UPDATES

Vol 2 Issue 2

2023 Board Officers and Liaisons

The 2023 HOA Board held an organizational meeting on January 9, 2023. The main purpose was to elect officers, establish Board liaisons to standing committees and establish a meeting schedule for 2023. Elected as officers for 2023 are: Judy Nixon, President; Bob Griffith, Vice President; Sharon Valvona, Secretary; and Jerry Warren, Treasurer. The 2023 Board also voted to establish an ad hoc (temporary) Assistant Secretary position in 2023 to assist the Secretary in addressing an extensive workload pertaining to document and IT management projects this year. Jeff Diton was elected to that position. At Large members are David Jackson and Ron Oliveri. Committee Board Liaisons are: Sharon Valvona, Information Technology; Jerry Warren, Finance; Bob Griffith, Clubs and Groups; David Jackson, Architectural Review; and Jeff Diton, Lifestyle Activities. Judy Nixon will be Carolina Preserve's representative to the Amberly Master Association Board of Directors. Open Board Working Meetings will be held on the third Tuesday of every month from 11:00 am to 12:00 pm.

New Court Reservation System

On January 16, 2023, a new reservation system was implemented for reserving tennis and pickleball courts. The courts are community amenities so all residents can reserve courts; you do not need to be a member of either club to do so. However, if you are new to reserving court time, you will need to establish a user account initially. Reservations can be made seven days in advance starting at 7:25 am. This is a new system so there may be tweaks in the beginning. Please be patient. You can find the court reservation system by going to the CP website, "Resident Services" and then select the respective court you wish to reserve. Be aware that the pickleball and tennis courts limit guests to three per household and to specific times in the day due to limited court availability. Please consult the club calendars for more information about court availability and guest policies, which are also available on the website under "Clubs."

CP News in Brief

Carolina Preserve Guest Policies

2023 guest passes (wrist bands) are available at the front desk. As of February 1, 2023, the 2022 guest wrist bands will not be honored. Each household is provided 30 wrist bands for the year. Additional wrist bands can be purchased at \$3/each. Residents are reminded that the CP guest policy applies to **households** not each resident residing in a household. Generally, households are permitted four guests at a time to use CP amenity(ies) and guests at all times must be accompanied by the CP resident(s), wear the guest wrist band and be signed in at the front desk by the resident(s) sponsoring them. The tennis and pickleball courts and swimming pools do have some guest restrictions. Please consult the Facilities Use Policy and club calendars for more information as to guest restrictions.

Indoor Pool Resurfacing

The indoor pool and spa were closed on January 15, 2023, to begin resurfacing and repair work on the indoor pool, spa and decking. The work requires that both the spa and indoor pool be drained, resurfacing done, the resurfacing work must cure and then both are refilled. After refilling, the water must be tested over a period of time to ensure there is no leaching of the resurfacing materials into the water. The work must also be inspected by the appropriate governmental authorities. Additionally, some of the ladders and the pool and spa indoor decking are being repaired/replaced, which takes additional time. Once all the work is complete, which is projected to take about two months, then the pool and spa can reopen. During this time, other local aquatic facilities are available. One option is Triangle Aquatics Center, 919-459-4045, where it provides a Senior/Silver Sneakers fee of \$3.50 per day and a monthly fee of \$30.00. Another option is UNC Wellness Center, 919-759-5900, where it is \$76.00 for a monthly membership, which we understand includes Water Aerobics classes and other activities. For more information and to confirm those fees, go to <https://www.triangleaquatics.org/facility/hours-and-admissions> and/or <https://uncwellness.com/northwestcary>. Pursuant to Section 9.7(a) of the Declaration of Covenants, the HOA does not subsidize resident fees while needed amenity maintenance and repairs are being done.

CP News in Brief

Yardnique

Yardnique started work in CP on Tuesday, January 3, 2023. Its first priority was to address lack of leaf removal at CP entrances and most common areas. A plan was put in place to then address mulch removal and continue leaf removal in the residential phases. Leaf removal will continue through February and March. It is important for residents to understand that Yardnique or any landscaping company contracted by the HOA, is not paid to perform personal or specialized landscaping for any one residence. They are here for the community. If a resident has specialized or personal landscaping requests other than that provided to the community at large, they can opt out of certain services and/or can retain their own landscaping service but cannot reduce their monthly dues by doing so. Every residence will receive the same landscaping services unless they have opted out. We look forward to Yardnique's landscaping services in 2023 and enhancing the overall curb appeal of Carolina Preserve.



2023 Financials At A Glance

By Jerry Warren, HOA Treasurer

OPERATIONS (\$000'S)				
	December YTD			Full Year
	Actuals	Budget	B/(W) Budget	Budget
Income	4,195	4,194	1	4,194
Uses:				
Reserves	(620)	(616)	(4)	(616)
Expenses	(3,466)	(3,563)	97	(3,563)
Net	110	15	94	15

**Note B/(W) 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	502	11	82	25	110	730
Interest	7	3	1	-	-	11
Expenses	(475)	(7)	(23)	(49)	-	(554)
12/31/2022	1,050	310	102	41	638	2,141

Treasurer's Comments

By Jerry Warren, HOA Treasurer

December income was \$352K, \$8K over Budget with higher resale fees (\$8K). Expenses were \$39K above Budget primarily due to higher stormwater/retaining walls (\$28K offsetting lower November) and previously delayed general landscaping/tree replacements (\$22K), offset by lower maintenance (\$8K) and payroll (\$3K). There was also an extra \$4K moved to the Villa reserve in order to balance their expenses and income for the year, a required entry. This resulted in monthly net of -\$16K, \$35K under Budget for December. However, the full year 2022 ended \$94K favorable to Budget, which is an addition to our Contingency Reserve going into 2023. This result is primarily due to expenses that were expected in 2022 but will now roll over to 2023.

Resale fees were \$8K above Budget in December as mentioned above (7 homes sold), making up some of the previous resales shortfall and leaving YTD resales only \$9K below Budget.

The Replacement reserve is now at \$1,050K, up \$4K from last month and up \$35K for the year. This month's major expense items were for stormwater/retaining wall/slope stabilization. The balance is higher than our expected year-end estimate due to substantial monies that haven't yet been spent for projects such as the indoor pool resurfacing, locker room renovations, and the Marsalis project. These expenses should be coming up in early 2023.



ARC Makes It Easy For You

By Ken Merten, Architectural Review Committee

A couple of things for the community to be aware of as we enter the new year.

The Design Guidelines have been updated and approved by the Board. Version 8.1 is now available online. Not too much new, but ARC did make over 40 changes to the Guidelines to make them a bit more user friendly and easier to understand, plus a few minor corrections.

Here is an update on a previous post in “ARC Makes it Easy for You” regarding enforcement of Guideline violations. When projects are completed, homeowners should inform ARC of the completion. Within a couple of months of a project approval, ARC does “Post Audits”, which means that ARC members visit each property that submitted a Modification Request or a Fast Track. The ARC member may or may not be seen depending on the project and its location. The visit is to check to see if the project was completed, and that it conformed to the specifics in the Modification Request approval. If something was not completed or if the project did not conform to the Guidelines requirement, Management is informed and it is up to Robert Hamilton, Facilities/Operations Director to follow up with the homeowner, which may or may not result in a “violation”.

One issue that surfaces too frequently is the replacement of a street tree with a tree that is smaller than the minimum requirements (2” caliper measured at 6” off the ground, and 8’ tall). Keep in mind that having to remove a newly planted tree and replacing it with another larger tree can be quite expensive. Your contractor is in the “business” of selling trees, but the homeowner must be in the “business” of making sure that the tree conforms to the minimum standards.

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 on the 2nd & 4th Wednesdays

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.

Getting to Know Your Kuester Staff

By Jeff Diton

We will continue to introduce the Kuester Management staff over the next several months. The Board hopes this will be informative to our residents about our staff and who does what.

This month we are featuring **Oscar Esperanza**, the Carolina Preserve Event Manager.

Oscar was born and raised in the Central American country of El Salvador. While in El Salvador, Oscar completed his Bachillerato agricola work in the fields of Agriculture and Botany. He moved to Raleigh when he was twenty years old to be close to his brother and cousins. Oscar initially worked in the kitchen in various Chinese Restaurants for the next seven years, before moving into the hotel industry. He worked his way up to the position of Banquets Captain, and eventually Assistant Banquets Manager. He was in banquets for ten years and then was a Housekeeping Manager for another ten years.

Oscar was working long and crazy hours at the hotel, and noticed our open Event Manager position with more regular hours. He applied and was the successful candidate in October 2017. As the Event Manager, Oscar is responsible for setting up and breaking down the rooms for all our events and managing the Room Calendar for booking events. Oscar also spends a significant amount of time providing consulting and advice to Clubs, Lifestyle, and CP University members on logistics, how to set up and configure the rooms, A/V possibilities, etc. A typical day for Oscar includes:

- Review the Room Calendar to plan for the day
- Meet with leaders on their event requirements
- Set up the rooms
- Being available for any problems that may arise during the day
- Train leaders on the A/V equipment
- Break down the rooms
- Set up rooms before he leaves for any early morning events
- Attend Kuester staff meetings about Carolina Preserve lifestyle and community topics in general

Getting to Know Your Kuester Staff

Hopefully we can fill the vacant Event Captain position this year to give Oscar some much needed help. Oscar encourages residents to meet with him far in advance of any events to review all the logistical requirements and Audio/Visual needs, especially when things are “out of the ordinary”. With everything going on now and Oscar being a “one-man band”, it’s oftentimes difficult to accommodate last minute requests. Also, please remember that things may be out of Oscar’s ability to resolve, like the aging sound system in the ballrooms, so please be patient and understanding if issues arise, or certain requirements cannot be met.

When Oscar is not at Bradford Hall, he could be found hiking in the mountains of North Carolina, or fishing at Falls Lake, his favorite spot. Oscar used to be an avid soccer player, but like many of us, has retired from the sporting world.

As you can see, Oscar has many responsibilities. Carolina Preserve is very fortunate to have someone with so much customer service experience in this role. Needless to say, most if not all club events, CPU classes, and Lifestyle activities would not be as successful without Oscar’s help and expertise. So next time you visit Bradford Hall and see Oscar, please say hello and thank him for all he does for our community.

Oscar Esperanza
Event Manager



2023 Committees

Architectural Review Committee

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

Board Liaison: David Jackson | Staff Liaison: Robert Hamilton

Club & Group Advisor Committee

Wanda Abel | Claudia Clissold | Joel Glassman | Cynthia Jackson | Marie Milazzo | Paulette Shekell

Board Liaison: Robert Griffith | Staff Liaison: Terrie Murray

Finance Committee

Dennis Curtin | Steve Harrison | Dennis Hefner | John Kasarda | Rahul Parikh | Paul Wolf | Daniel Yarborough | Ted Young

Board Liaison: Jerry Warren | Staff Liaison: Christine Hast

Information Technology Committee

Jean Curtin | Dennis Curtin | Alan DeCrane | Margaret Horst | Amy Levine Robert Willenberg

Board Liaison: Sharon Valvona | Staff Liaison: Glenda Hunter

Lifestyle Advisory Committee

Harlean Botha | Alora Burton | Linda Laurich | Jackie Millslagle | Louise Stanley | Davie Streifford | Gayle Streifford | Lynnette Womble

Board Liaison: Jeff Diton | Staff Liaison: Terrie Murray

2023 Board

Judith Nixon
President

Robert Griffith
Vice President

Sharon Valvona
Secretary

Jerry Warren
Treasurer

Jeff Diton
Assistant Secretary

David Jackson
Member at Large

Ron Oliveri
Member at Large

Mark Your Calendar

HOA Board Meeting
February 21 | 10:15am
GoToWebinar
