



March 2023 XL
Carolina Preserve
HOA NEWS

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Community



1. **A group of people living in the same place or having a particular characteristic in common.**
2. **A feeling of fellowship with others, as a result of sharing common attitudes, interests, and goals.**



HOA President's Comments

by Judy Nixon

Last month, I focused on the state of Carolina Preserve volunteerism. The Board wants to thank all those residents who submitted suggestions and comments. Now, we have a couple of volunteer opportunities for residents to be a part of advancing and enhancing the Carolina Preserve living experience. The Board is establishing two important task forces, the Go Green Task Force and the Volunteerism Task Force. These groups will have a defined timeframe in which to research, evaluate, and make recommendations to the Board related to their specific objectives and mission statements. David Jackson, At-Large Board member, will be the liaison to the Go Green Task Force. Ron Oliveri, At-Large Board member, will be the liaison to the Volunteerism Task Force. David and Ron also will lead the task forces with resident volunteers co-chairing.

Based on the strategic planning focus groups last year, it's clear there is strong community support for determining how, whether and to what extent Carolina Preserve can go green. For example, the Go Green Task Force will research and evaluate Bradford Hall for use of sustainable or alternative energy sources as well as how it and other amenities can be more environmentally friendly. The Go Green Task Force will also research how and where we can incorporate planting NC native plants to replace dead foliage and the addition of sustainable NC native plants within Carolina Preserve. The Volunteerism Task Force will research and evaluate the decline in resident volunteerism and recommend methods, programs, and improvements for recruiting and retaining Carolina Preserve volunteers. This is your community and your opportunity to get involved. If you are interested in volunteering, go to the CP website dashboard, click on "Resident Services," "Volunteer Form" and complete and submit your information that you wish to be considered for future task forces. There will also be other Task Forces established in the future so sign up now to be considered.

I Want to Know... Frequently Asked Questions

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

Q: Our questions and serious concerns are related to CP's exorbitant legal fees incurred during 2022. We believe our total planned legal expenses were just under \$20,000. Please offer guidance so we can locate where to view CP's total legal expenses for 2022. While our usual HOA attorney is Hope Carmichael from the Jordan Price Law Firm, in 2022 we became aware that the HOA hired a specialized attorney for the Marsalis project. The total cost for both attorneys must have greatly exceeded our 2022 budget.

A: HOA overall legal expenses are posted with the financial information on the website under the Governance tab. Disclosure of specific legal services is attorney client privileged and not subject to disclosure. However, it is important to understand, that when the HOA avails itself of legal representation, it is not done lightly and it is approved by the full Board.

Generally, as it relates to Ms. Carmichael, the HOA counsel, her representation during 2022, was in reviewing, interpreting and drafting legal documents associated with community issues, resident(s) grievances and complaints and representing the HOA pertaining to those same resident(s) threats of potential litigation. The Board does not engage in legal work or interpretation, that is left to the HOA attorney upon which we rely. The Marsalis attorney, Ms. Jones, was retained in response to community concerns that the HOA Board was not getting other opinions regarding the Marsalis repair and to negotiate with the Town of Cary, as was explained to the community at the outset.

While the foregoing legal work may have exceeded the projected budget for 2022, it was necessary and unforeseen at the time the 2022 budget was established in 2021. Determining whether something is "Exorbitant" in our opinion is based on whether it is frivolous and unnecessary. That was not the case in 2022 pertaining to the legal representation retained. It was necessary, in the best interest of the Carolina Preserve community, and may save the HOA substantial sums of money going forward.

Q: How does the recently approved costs related to the pavilion, indoor pool and electrical work, tree removal services and indoor pool painting affect the 2023 budget?

A: The indoor pool work was budgeted at \$100,000.00. Due to unforeseen electrical issues and the extent of the deterioration of the indoor pool surface, change orders needed to be approved. At this time, the indoor pool budget is approximately \$30,000.00 over budget, which includes the necessary electrical work. The pavilion construction is about \$9,000.00 over budget due to hitting bedrock when installing the posts. The tree removal and indoor pool painting is within budget. Please read the Treasurer's Report in this Newsletter for the overall Carolina Preserve budget status.



CP News in Brief

March 2023

MONTHLY UPDATES

Vol 2 Issue 3

Indoor Pool Resurfacing/Renovation Status Update:

Work began on the indoor pool resurfacing and renovation project January 16, 2023. The first step was to let the pool chemicals dissipate before draining the pool, which took several days. Since then, the entire pool and spa surfaces have been removed and new tiles installed. While removing the existing surfaces, more extensive deterioration was discovered that required additional concrete removal work. A bonding inspection (electrical) was performed and found electrical work that needed to be completed before the resurfacing work could continue. The Town of Cary approved an electrical and lighting permit, with work now being performed. Once the electrical work is completed, the remaining resurfacing and plaster work will take place, railing and ladders installed, the pool filled, decking repaired/replaced and the pool water heated. The final step will be a Chatham County health inspection to authorize reopening of the pool. The indoor pool area has also been repainted and looks great! We will keep you updated as work progresses.

New Cubbies Policy for Clubs:

The Club Operating Manual (COM) was updated at the end of 2022. One of the changes addressed cubbies, including limiting each club to two cubbies due to storage space limitations and providing keys to Management for locks the club(s) changed. Some clubs have several cubbies, some clubs have dissolved and still have materials in cubbies and some clubs have changed the locks on cubbies without providing keys to Management. If a club has more than two cubbies, please reduce the number to two and provide keys to management for the cubbies emptied. If a club has dissolved, please remove all materials still stored in cubbies and provide keys to Management. The same is true for clubs who have changed the lock(s) to the cubbies; please be sure to provide copies of the keys to Management. If you are an officer of a club, please be sure the foregoing takes place by April 1, 2023. Your cooperation is appreciated.

CP News in Brief

HOA Dues Automated Payments:

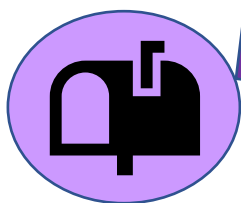
If you have automated payments set up for your HOA dues, please ensure the payments have been updated for 2023; \$287 single family homes and \$307 for villas. You can also set up automatic withdrawal by Kuester by going to <https://kuester1.formstack.com/forms/dd>. If you have any questions or concerns about your annual assessment rate or need assistance accessing the web portal or Kuester Connect App, please contact the Kuester community support team by email at support@kuester.com or by phone at (888) 600-5044.

Hybrid Modality Research and Testing Status:

As part of the Carolina Preserve Strategic Plan, the Board has been pursuing finding a hybrid method, i.e. modality, that will make meetings and hopefully other presentations more accessible for simultaneous in-person and remote/virtual attendance. Certain criteria for a successful modality were established to judge the technologies tested: 1) Board members and resident speakers must be clearly visible or audible to the virtual viewer; 2) all speakers must be clearly heard and understood; and 3) the virtual attendees must have a similar meeting experience as those attending in-person. Of three modalities tested, so far only one appears to be a possible option, which if through further testing we find it meets all these criteria will also be budget friendly. Further testing will take place in early March and if successful, will be implemented as soon as possible.

SIGNPOST AND MAILBOX POST IMPROVEMENT TASK FORCE UPDATE:

More than 700 black, metal covers have now been installed over damaged mailbox sleeves! Sections 1-3 are completed, and work has begun in Section 4. We have about 400 more covers to install. Prior to work starting in Section 5, an email will be sent to those residents 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. The targeted project completion date is the end of April. Please send any questions to the Task Force at mailboxtaskforce@cpamberly.net. Stay tuned for future updates as the project progresses and walk around Sections 1, 2 and 3 to see the improved look these covers are making.



Click the mailbox
to access the FAQs



2023 Financials At A Glance

By Jerry Warren, HOA Treasurer

OPERATIONS (\$000'S)				
	January			Full Year
	Actuals	Budget	B/(W) Budget	Budget
Income	402	406	(4)	4,900
Uses:				
Reserves	(83)	(83)	-	(875)
Expenses	(295)	(328)	33	(4,046)
Net	24	(4)	28	(21)

**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
12/31/2022	1,050	310	102	41	638	2,141
Contributions	80	-	1	2	24	107
Interest	1	-	-	-		1
Expenses	(47)	-	(18)	-		(65)
01/31/2023	1,084	310	85	43	662	2,184

Treasurer's Comments

By Jerry Warren, HOA Treasurer

January income was \$402K, \$4K under Budget with lower resale fees (-\$5K) causing the shortfall. Expenses were \$33K under Budget primarily due to lower landscaping costs (-\$15K), payroll (\$6K), service contracts (-\$5K), general & administrative expenses (-\$3K), and a one-time income tax rebate (-\$4K). This resulted in monthly net of \$24K, \$28K over Budget.

Resale fees were \$5K under Budget in January as mentioned above. The year got off to a slow start with only 1 home sold.

The Replacement reserve is now at \$1,084K, up \$34K from last month. This month's major expense items were for the Marsalis project as well as some other stormwater management issues (\$38K) plus clubhouse maintenance expenses (\$9K). In addition, \$18K was spent within the IIF Fund on the Beckingham Loop Park project.



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

In this month's article, we are featuring a very special group of Kuester Staff. These folks are not only Kuester employees, but our own friends and neighbors in Carolina Preserve. Of course, I'm referring to the fabulous front desk receptionists who greet us as we enter Bradford Hall each day. Today we are featuring **Laura Baas and Susan Faucher**, and in future articles we hope to cover the entire front desk staff.

Laura and her husband Bill moved to Carolina Preserve in August of 2018 and Laura has been working at the front desk for about a year now. Laura is a retired nurse who has worked in such diverse areas as the Critical Care Unit in Commack, Long Island, and the Maternity Ward here in the Rex Healthcare system. Laura was involved with the BYOB, Calabria, Pot Luck, and Veteran's clubs but slowed down her activities during the pandemic. She hopes to start back up with her many club interests soon. Laura and Bill have three sons all in the area, and many of you may know their son Pete who is a fireman in Apex, and works at JNJ Dryer Vent Cleaning with his firemen buddies during his off-time.

Susan and her husband John moved to Carolina Preserve 12 years ago, and Susan has been working at the front desk for six years now. Susan is a retired elementary school teacher from Ohio, and has taught at many different grade levels. In an effort to reach more students, Susan received a Master's Degree in Learning Disability and Children's Behavioral Disorders. She had an opportunity to become a school Principal, but decided to remain working directly with her students where she felt she could have more of an impact. Susan's philosophy with teaching was to adjust her teaching style to fit her students, and this no doubt contributed to Susan's students receiving the highest standardized Math scores in her district for 10 years running, and Susan receiving a "Teacher of the Year" award in 2009. When not at the front desk, Susan could be found playing cards in her neighborhood, working in her garden, or visiting her daughter in Kentucky.

Laura and Susan discussed their primary responsibilities as front desk receptionists:

- Answering resident questions about Club Express, in-person, by phone, or by email
- Educating residents on the various Carolina Preserve procedures such as ARC guidelines
- Providing information and being a spokesperson for potential buyers who visit Bradford Hall
- On-boarding new residents, or residents who have moved within CP
- Registering residents for Lifestyle events and collecting money for those events
- Making copies for residents (reminder – the first 10 black and white copies are free, afterwards it's 10 cents a copy, and always 25 cents for color copies)

Getting to Know Your Kuester Staff

I asked Laura and Susan what their favorite parts of the job were and they both had similar answers:

Laura: I love meeting new residents who I wouldn't ordinarily have a chance to meet. I enjoy expressing care and concern to all residents, and showing interest in their questions, concerns, and life in general.

Susan: I love meeting and greeting people, and adding a little bit of happiness to everyone who walks through the doors of Bradford Hall. I've found that I receive that happiness right back in tenfold when I do that! I also enjoy meeting perspective buyers at CP, and love telling them how wonderful our community is.

I also asked Laura and Susan is there one thing they wish they could change about their jobs at the front desk:

Laura: I wish all residents would learn how to use Club Express and stay connected with everything that's going on with the community. It would make their lives so much more fulfilling and easier. I was recently shocked that one resident was not aware our indoor pool was undergoing maintenance. It makes me sad sometimes to think that some residents are not aware of all the wonderful events we have here and the informative communication that is distributed. (Editor's comment – please note that on Thursdays now through April 13, 2023 from 12:30pm - 2pm in the Bradford Hall Wall Street Room, a member of the IT Committee will be available to answer any and all questions you may have about our community website, Club Express. This service is free and an appointment is not necessary – just stop on by, first come first served!).

Susan: I wish I could sleep two hours later, ha-ha. Our shifts are from 6:00 AM – 2PM, and 2PM – 10PM. When I have the early shift, I usually try to get to Bradford Hall at 5:15 to turn on the lights, turn on the tv's in the Fitness Center, check to see if anything's amiss like water on the floor or broken glass, and check the Front Desk Message Board to see if there are any notes from the previous day's staff I need to know about. Bradford Hall at 5:15 in the morning is kind of creepy, so luckily my husband doesn't mind keeping me company until residents start arriving.

As you can see, the front desk has many responsibilities, and we are so lucky to have front desk receptionists that look to “add a little bit of happiness” to our lives as we enter Bradford Hall.

Getting to Know Your Kuester Staff

Laura Baas
Front Desk Staff



Susan Faucher
Front Desk Staff



2023 Committees

Architectural Review Committee

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

Board Liaison: David Jackson | Staff Liaison: Robert Hamilton

Club & Group Advisor Committee

Wanda Abel | Claudia Clissold | Joel Glassman | Cynthia Jackson
Cara Lehman | Francine McElhinney | Marie Milazzo
Paulette Shekell | Sandra Stein

Board Liaison: Robert Griffith | Staff Liaison: Terrie Murray

Finance Committee

Dennis Curtin | Steve Harrison | Don Ferranti | Dennis Hefner
John Kasarda | Rahul Parikh | Paul Wolf | 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 | David 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
March 21 | 11:00am
GoToWebinar
