



May 2024 Issue LIV
Carolina Preserve
HOA NEWS

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May Day



1st



5th



12th

FULL FLOWER MOON



THE OLD FARMER'S ALMANAC

23rd at 9:58am ET



27th

HOA President's Comments

By Sharon Valvona

I hope everyone is enjoying our beautiful spring. A thank you to all who have signed up for the strategic planning resident focus groups. We are looking forward to some excellent brainstorming and results.

Thinking about our future brings to mind a number of friends who have recently transitioned or will soon be transitioning to other neighborhoods that have supportive services different than those available at Carolina Preserve. This is a planned and positive move for all these folks. They are moving to new neighborhoods that are as welcoming and vibrant as our own. Happy as I am for them, I will miss their energy, commitment, and contributions. We are losing individuals who have provided years of leadership in many roles. I imagine many of you are feeling their absence in clubs and committees as well.

I want to take this opportunity to say thank you to all of them for helping to make Carolina Preserve the community that I wanted to join almost 5 years ago and we all continue to enjoy today. I know how much their new communities will benefit from having them there.



Project Management



As the Board has come to better understand the history and management of the Pavilion project it became apparent that an improved project management and documentation process was needed. As a result, since the fourth quarter of last year, a procedure to rectify this has been developed and brought before the Board for review. The following is a **brief** summary of the much more detailed procedure that provides insight into the overall proposal.

The procedure includes five distinct phases. Phase 1 is “Initial Steps” in which the project is justified. Why is it needed? What is the desired outcome? What are the projected costs both for the project and for ongoing operations. Phase 2 is “Moving Forward” in which the basis for a Request for Proposal (RFP) is developed. Engineers, architects, local authorities, etc., are contacted and a list of potential contractors is developed. Phase 3 is “Decision” in which the RFP is issued, references are researched, budgets are approved, timelines are set. Phase 4 is “Project Management” in which the Facilities Manager meets with the Board, the General Contractor, and anyone else needing to understand the project. In this phase, milestones are confirmed, and progress reports are issued. Budgets and timelines are closely monitored. Pertinent documents and warranties are gathered and understood. After review with the Board, the Facilities Manager closes out the project and authorizes final payment. Phase 5 is “Completion” in which documents are reviewed, lessons learned are documented, and files are saved for future Boards to utilize as needed.

Along with this improved project management and documentation process a revamped RFP process and format is under review. Both are integral to the success of future projects. In addition, authorization levels will be reviewed and procedures set up with all concerned so that checks and balances are in place and fully functional. Lastly, as new contracts are drafted between the HOA and our Management Company, all the above will be included as our expectations for process improvements.



Realtor Strategic Planning Focus Group

On April 8, most members of the Board met with realtors who have listed and/or sold in our neighborhood to ask for their perspective on how to maintain our excellent housing market resale values. The two primary questions asked were what they hear about our neighborhood as they are showing homes in Carolina Preserve to prospective buyers and how we compare with other similar communities. We were told that of the five communities like ours (being part of a master community) CP ranks if not at the top, then second. The realtors acknowledged that many homes here sell within a few days, often over list price. The Board asked very specific questions about what attracts buyers and why they may not choose CP to help us all brainstorm long-term plans.

General appearance



Positives

- Buyers appreciate the beauty of the campus.
- They really like the mature landscaping, and mature trees and the preserve setting.
- Flowers, bulbs, and other plantings make a good impression.

Concerns

- Realtors have heard comments about yards full of roots. These issues have impacted sales at some homes.
- Remember, people are coming from large perfect lawns to homes with small yards.
- Most buyers hate vinyl siding. It has a stigma as being cheap and future maintenance will be difficult as it ages.

Consider

- General upkeep, general appearance, and the overall curb appeal are the most important things we can do.
- We have one chance to make a first impression. If we must make a choice, we should focus on our outside appearance first.
- Our preserve setting and common areas as well as well-maintained, mature privacy plantings help mitigate small yards concerns.
- An effective compliance program is an important part of maintaining appearance.
- Fiber cement siding is what new 55+ communities are using. We should be considering new alternatives and how to transition to them.
- We were the first and are the model to which the others aspire. We are also the oldest, everyone else is newer. We must keep it fresh.

Bradford Hall

Positives

- BH is an impressive activity space.
- BH has both an indoor and outdoor pool, while many more recent communities are limiting their build to an indoor pool. We also have the Amberly community pool just down the street.
- BH feels like a mountain lodge. The traditional look appeals to an older clientele. Some clients find it comfortable and homey.
- The front desk staff does an excellent job of making visitors feel welcome, very different from many other communities. Residents will often volunteer to take visitors around. Residents will spontaneously approach prospective buyers with realtors to tell them how much they love living here.

Concerns

- Clubhouses at newer 55+ communities are decorated in white and marble. Their sharp, modern look appeals to younger buyers.

Consider

- Consider adding or improving technology to provide a more modern feel. E.g., the screen in the varsity used for movies is smaller than some current buyers have in their homes. Embrace movie day, make it a community event, bring back the popcorn machine.

Other amenities and considerations

Positives

- Location, Location, Location
- People buy here for the community, activities, clubs, pickleball courts, tennis courts, the idea "we have everything".
- Buyers are impressed by our financial stability. They like hearing that there has never been a special assessment.
- Buyers like our pocket parks
- Access to the Amberly clubhouse, pool, and activities is a plus.
- So is the easy distance to the airport.



Concerns

- The feedback regarding pickleball courts was mixed. Some realtors felt the small number of courts was less a concern. Activity around the courts provides a positive impression.
- Most competing communities have more pickleball courts than we do. Those who thought more courts would make us more attractive felt one of the mantras here is “we have everything”. With that mindset, courts in nearby parks are not a draw or a mitigation. People buy here expecting to have everything here.

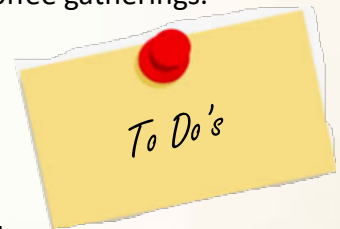
Consider

- Some other similar communities are opening small informal gathering locations with food in their clubhouse. BH is not zoned for serving food, so buyers are pointed to the food venues across from the Amberly pool. Realtors encouraged us to continue to do informal activities like the pocket park coffee gatherings.
- Many similar communities have community gardens.

Providing information

Positives

- Potential buyers make extensive use of our external website.
- The various fact sheets about Carolina Preserve and opportunities in the larger community are very informative. Realtors can download them and pass them along to clients.
- ARC is available to answer questions from prospective buyers about what is possible under current design guidelines.



Concerns

- Make sure there are current copies of newsletters and a current list of clubs available. Available newsletter copies have occasionally been out of date.

Consider

- Add a list of FAQs.
- Mitigate any erroneous impression that we are a CCRC by clearly stating what we are and what we are not on the website.
- Be aware of social media impact. At least one buyer walked because of negative Next Door postings.

I Want to Know. . . Frequently Asked Questions

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

Who is responsible to replace the trees and shrubs around the utility areas on our front yards?

Even though these trees and shrubs were planted by Pulte originally, it is now the homeowner's responsibility to replace any plantings that have subsequently died. Please refer to the ARC Design Guidelines Version 8.2, Sections 3.1.E, and F for more information.

I heard at the Strategic Planning session that Carolina Preserve has a goal of improving our public image. I'm concerned that the "No Trespassing" signs around the pavilion will negatively impact our public image.

These signs were placed in response to concerns raised by residents regarding non-resident usage of the facilities. While these signs may be counter-intuitive to improving our public image, they are a necessity given the amenities here are for Carolina Preserve residents only, and we would be opening ourselves up to significant liability exposure if we let the general public use our amenities. In addition, all CP residents have agreed to comply with the Facilities Use Policy, while outside residents have not. Also, the signage is consistent with similar signs we have around the tennis and pickleball courts, The Gathering Place at Arvada, and other pocket parks around Carolina Preserve.

Where can I find the Carolina Preserve Covenants?

The Carolina Preserve Covenants, along with all governing documents, may be found under the Governance Tab -> CP Documents. Please remember that as a resident of Carolina Preserve, we comply with many governing documents, not just the Covenants. The Facilities and Use Policy, the Club Operating Manual, and other policies may be found under the heading of Policies and Procedures. The Covenants may be found under the High Level Laws and Rules heading, which also contains City, State and Federal, and Amberly Master statutes.

Is it true that the pavilion cost \$100K over the original budget?

The short answer is no.

- Last year's Treasurer compiled pavilion information to report back to the community in October. He determined that, after approval of the Pavilion project, in December 2020, 152,390.83 was allocated in the Infrastructure Improvement Fund, which is our capital fund and \$8000 was allocated in operations. This is a

total of \$160,390.83 as the original budget. This included structure, electrical and picnic tables, as well as engineering.

- As of July 20, 2021, an additional \$ 20,000.00 was budgeted because the project was delayed during Covid and material costs increased during that time for a total of \$180,390.83.
- January 17, 2023, \$ 4,200.00 was approved for the additional cost setting the Pavilion foundation in bedrock for a total budget of \$184,590.83.
- The current known cost of the Pavilion, with the additional 2024 General Contractor cost of \$2681, is \$224,142.14. This is \$39,551.31 over the approved budget.

What is the source of the overage?

This overage can be attributed to the following sources.

- Contrary to the express Task Force specifications, the TOC required a sidewalk from the Pavilion to the sidewalk that runs along Allforth. This sidewalk is shown in the 2021 engineering plans. The cost of the sidewalk and associated landscaping was \$18,975 . No record was found showing that the cost was added to the approved budget.
- There was a \$17,590.31 overage in electrical costs that were not approved by the Board before they were incurred.
- The actual bedrock cost was \$305 over the approved \$4200.
- The \$2681 cost of a general contractor was incurred in 2024 in order to fulfill a final Certificate of Compliance requirement.

Why don't the pillars in the pavilion have stone as shown in pavilion images?

- The Board reported information that was verbally related to us last year, i.e., the TOC required them based on a sample picture. That was a mistake. Review of plans shows them appearing on the original engineering plans.
- The Board has not found documentation that shows the discussion or process by which they were changed in the construction.
- There are also no invoices showing additional cost to the community for the change, including any cost for resubmitting corrected plans in late 2023/early 2024.

Why are attendees being charged for food at the CP Annual Picnic?

Lifestyle has traditionally charged a nominal ticket price to defray the CP Annual Picnic Food costs. The amount does not cover the full cost of the band, food, and ice cream.

2024 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)					
	March YTD			Full Year	
	Actuals	Budget	Difference		Budget
Income	441	428	13		5,138
Uses:					
Reserves	(28)	(28)	-		(925)
Expenses	(384)	(400)	16		(4,209)
Net	30	0	30		3

RESERVES + EQUITY (\$000'S)							
	Replacem ent	Villa	IIF	Painting	Oper Resv (Equity)		Tot Reserves +Equity
2/29/2024	1,469	295	5	54	656		2,477
Contributions	25	-	1	2	30		58
Interest	4	1	0	0	-		5
Expenses	(14)	-	(1)	-	-		(15)
3/31/2024	1,485	296	4	55	686		2,525

Treasurer's Comments

By David Jackson, HOA Treasurer

After allowing for fitness classes and seminars, income and expenses are in line with the budget.

Resale income was up in March; there were five recorded resales of houses in CP providing over \$16K in revenue.

We are still getting higher than anticipated interest income from Certificates of Deposit (CDs). Two CDs matured in March. We rolled those funds totaling \$145K into a one-year CD and an 18-month CD at over 5% interest.

Accounts with unusual cost overages were office supplies (\$5K) and tennis court maintenance (\$15K), which the Finance Committee will be reviewing. At this point, no re-forecast for the year is warranted.

The Capital Reserve is now at \$1,839K (including maintenance, IIF, villa, and painting reserves). Three projectors for the Bradford Hall ballrooms were replaced for \$14K. The Contingency Reserve is now \$686K.

Strategic Planning meetings are currently being conducted. Once those meetings are completed and the results analyzed, the annual budget cycle will begin.

The attached Financials are compiled from reports provided by Kuester.



Architectural Submissions

Everything you need to know for Architectural Submissions

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.

Email inquiries to

Architectural.Committee@cpamberly.net

or

Patrick Dzimiri, Compliance Coordinator: compliance@cpamberly.net

Compliance Corner

*By Patrick Dzimiri, Compliance
compliance@cpamberly.net*

Hello!

May is already here! I hope that April was a productive and enjoyable month for everyone! With Spring finally in full gear it's been great seeing and speaking with you all as I make my rounds around our community, as well as seeing you all in Bradford Hall!

In May our main area of focus will be yard decorations, patios and grills. In ARC, we've received numerous requests to expand patios, so this is an exciting time of the year, where there are a lot of projects that are ongoing. With this in mind please remember:

1. Please submit the required paperwork (Fast Track or Modification Request, depending on the project) and obtain (for Modification Requests) the appropriate approval before you begin your project.

[Modification Request Form \(MR\) weblink](#)

[Fast Track Form weblink](#)

2. Any work being done on the home should not begin before 8:00am.
3. Overnight street parking is not allowed between 10p.m. and 6a.m. unless approved in advance by the ARC & Compliance Coordinator (me). There have to be mitigating circumstances for approval to be granted, on a case-by-case basis.

As pertains to yard decorations, patios and grills, please keep the following in mind:

1. All decorations must be in the homeowner's lot placed at least 3 ft from the public sidewalk or 3 ft from the curb where the sidewalk does not exist.
2. Patio expansions are considered on a case-by-case basis. Please submit an MR and obtain approval prior to beginning any patio extensions.
3. The piping of a natural gas line for outdoor grills, generators, fire pits, or other projects must be hidden by plantings up to the connection point.

The ARC guidelines (pg 45) are available on the Community website and provide a wealth of information: [ARC Guidelines weblink](#)

You will need to log into the Community website to access the links above. Wishing you all a wonderful May!

Your Friendly HOA Compliance Manager,

Patrick

2024 Committees

Architectural Review Committee

Steve Botha | Ed Benfold | John Bongino | Bill Gurecki
Claire Hammitt | Kent Kjellgren | Ken Merten
Board Liaison: Ron Madl | Staff Liaison: Patrick Dzimiri

Club Advisory Committee

Wanda Abel | Joel Glassman | Cynthia Jackson | Ian Jagoda
Cara Lehman | Francine McElhinney | Marie Milazzo
Sandra Stein | Betsy Stevens
Board Liaison: Ron Oliveri | Staff Liaison: Laurene Adkins

Finance Committee

John Adamo | Dennis Curtin | Steve Harrison | Rahul Parikh
Paul Wolf | Ted Young
Board Liaison: David Jackson | Staff Liaison: Paul Fogg

Information Technology Committee

Jean Curtin | Dennis Curtin | Alan DeCrane | Brian Dos Santos
Margaret Horst | Amy Levine | Robert Willenberg
Board Liaison: Jeff Diton | Staff Liaison: Glenda Hunter

Lifestyle Advisory Committee

Harlean Botha | Alora Burton | Marianne Frisch
Jackie Millslagle | Louise Stanley | Christopher Reinhold
Gayle Streifford | Lynnette Womble
Board Liaison: Stan Levine | Staff Liaison: Terrie Murray

2024 Board

Sharon Valvona

President

Ron Madl

Vice President

Jeff Diton

Secretary

David Jackson

Treasurer

John Kasarda

Member at Large

Stan Levine

Member at Large

Ron Oliveri

Member at Large

Mark Your Calendar

May 21 | 1:00 pm

In person & virtual

HOA Board Community Meeting

June 17 | 6:30pm

In person & virtual

July 16 | 1:00 pm

In person & virtual
