

***Welcome
To
Hacienda Carmel
Community Association***

www.HaciendaCarmel.org

November 1, 2020



Hacienda Carmel Community Association

General Information

- ❖ Hacienda Carmel was established in 1962 as the first “planned retirement community” of its kind in the western U.S. with residency limited to age 55 and older (with certain exceptions) in accordance with the *Federal Senior Housing Residency Requirements*.
- ❖ Hacienda Carmel is comprised of three hundred (300) individually owned units – each with its own Assessor’s Parcel Number and therefore each homeowner is responsible for payment of annual property taxes on their condominium unit.
- ❖ Hacienda Carmel is a “**not-for-profit mutual benefit organization**” and as such each homeowner is considered to be an equal “*Member*” of the “*Association*” owning an undivided 1/300th interest in all assets of the community including the buildings, equipment and common areas.
- ❖ The Association is largely governed in accordance with the California Civil Code by an elected Board of Directors comprised of nine resident Members of the Association each serving two-year terms. Election of directors is conducted by secret ballot with the tabulation of ballots taking place at the Annual Meeting of the Members, held on the first Monday of June each year.
- ❖ The “**Governing Documents**” of the Association consist of the Articles of Incorporation, the Bylaws, the Covenants, Conditions & Restrictions (CC&R’s), the Ground Rules and the Architectural Rules as well as various written policies that may be adopted by the Board from time to time. Copies of the governing documents for real estate and lender use are available on the Association’s website.
- ❖ Day-to-day operations of the Association are handled by an on-site General Manager along with a staff of approximately 19 full-time and 5 part-time employees. Staffing includes administration, front desk operations, building maintenance, grounds maintenance, housekeeping and security/resident services.
- ❖ The annual operating budget of the Association for May 1, 2020 to April 30, 2021 is \$3,670,000. Primary funding of the Operating Account is derived from the collection of monthly “*maintenance fees*” from each homeowner. The operating budget is set and approved annually by the Board of Directors in conjunction with the Association’s Finance Committee and management.
- ❖ The monthly maintenance fees include all utilities (*except for television & internet service*) including an in-house “land-line” telephone system. Please see the “*Telephone System*” tab in the Membership binder for complete information on all the various features of the Hacienda phone system.
- ❖ Monthly maintenance fees also include the cost of regular upkeep for buildings, grounds & common area as well as all other operational expenses including staff payroll & benefits, general supplies and outside services such as legal, accounting, insurance administration services, etc.
- ❖ The Association maintains insurance policies for property, general liability & flood coverage for the residential buildings as well as the common area buildings & grounds. Homeowners are responsible for obtaining “*Condominium Owner’s Insurance*” (HO-6 policy) for coverage of the interior of the dwelling as well as personal property & liability. (*See Article 10 of the CC&R’s*) Homeowners may also purchase an optional individual flood insurance policy for coverage of personal contents within the unit if desired. A more detailed description of the Association’s insurance coverage is provided in the **Annual Disclosure to Members** booklet.
- ❖ In addition to income from monthly maintenance fees, operating revenue is also generated from the Casa Amigos guest house as well as leasing portions of the facilities to independent operators such as the on-site hair salon and **Casa Carmel**, a six room assisted living facility operated independently in a wing of the Casa Central clubhouse building by *Central Coast Senior Services* based in Monterey.

- ❖ A fixed amount of the monthly maintenance fees (currently \$33,000 per month) is transferred to a capital reserve fund used for the repair, scheduled refurbishment, or replacement of large common area assets such as roofing, exterior painting, asphalt paving, vehicles, maintenance equipment, kitchen equipment, interior spaces, etc. Maintaining this well-funded reserve account minimizes the risk of special assessments to members and as such the Association has not had to impose a special assessment in the past thirty years. Currently, the balance in the “*Reserve Fund*” is approximately \$900,000.
- ❖ There is a “transfer fee” of \$1,000 charged on the sale of each unit and is typically paid through the escrow process. This fee is negotiable between the seller and the buyer of a unit. The transfer fee covers the Association’s costs for the administrative process of setting up new Member records, providing insurance information, the membership binder, orientation meeting, maintenance items or repairs that may be required at the time of sale. There is also a transfer fee of \$250 charged to the unit owner for each authorized rental transaction involving a change of tenant.
- ❖ Overview of Unit Maintenance responsibilities – Article 9 of the *Hacienda Carmel Covenants, Conditions & Restrictions* (the CC&R’s) describes in detail the items for which the Association is responsible and those for which the Homeowner is responsible. Essentially, the Association is responsible for maintenance & repair of the exterior shell of the building along with the adjacent walkways, foundation and infrastructure, while the Homeowner is responsible from the “walls-in” of the unit. However, there are certain exceptions with regard to items such as the furnace system, skylights and other non-original improvements made to the unit by all previous owners. Day-to-day maintenance issues such as clogged drains, furnace problems, etc. should be reported to the Front Desk who will in turn notify the appropriate department for corrective action. Please note that any charges incurred by the Homeowner calling an outside service for repairs (such as a plumber) before notifying Hacienda Carmel will be the responsibility of the Homeowner.
- ❖ Modifications to the unit or Common Area planting by the Homeowner – Similar to virtually every homeowner’s association, Hacienda Carmel has specific rules regarding certain modifications to the unit or Common Area surrounding the unit with the requirement for approval before the work is done. Basic interior work such as painting, flooring, replacement of cabinets, counter tops, appliances & fixtures does not require prior approval. However, modifications such as replacement of windows or doors, removal of interior wall sections, addition of skylights, re-routing of a gas line, etc. as well as any changes to the landscaping outside the unit do require pre-approval and are subject to review by a committee delegated by the Board of Directors. Please refer to the HCCA “*Architectural Rules*” booklet for complete details.
- ❖ Rental Policy – In accordance with the Association’s governing documents, not more than 15% of the 300 residential units may be rentals at any given time. The Association maintains a waiting list for existing homeowners who desire to lease their unit upon reaching the top of the wait list. Minimum lease period is six months and must be a lease of the entire unit. Sub-letting of a room within a unit is not permitted. Short term transient rental of a room or the unit (such as VRBO or Airbnb) is also prohibited.
- ❖ Hacienda Information Line – Hacienda Carmel has a designated in-house phone line to provide residents with a recorded message with updated information regarding any pending situations such as extreme winter storm activity, electrical outages, water outages, or other pertinent information. Residents are encouraged to please call the “*Information Line*” rather than inundating the Front Desk staff with phone calls. Please dial **7838** from Hacienda land-line phones or **625-7838** from outside or cellular phones.
- ❖ Bi-Weekly Bulletin – Every other Friday an informational newsletter is published containing pertinent info from the General Manager as well as upcoming social happenings and notifications from various groups, clubs, etc. The Bulletin can be found in the *Information Wall Rack* adjacent to the coffee station.
- ❖ Hacienda Carmel is an independent living community and is not licensed in any way to operate as a “care facility” or “assisted living facility” and therefore does not provide any type of medical, nursing, caregiving or assisted living services. In the event of an emergency situation, Hacienda staff will respond and contact the appropriate emergency services as needed. Some of our residents do engage the services of independent providers at their own expense. However, it should be noted that on a day-to-day basis Hacienda staff members often perform many tasks for residents (such as changing a light bulb, or moving a piece of furniture) that are considered to just be a part of the “***Hacienda Way.***”

Specific Information Regarding Individual Units

- ❖ **Smoke & Heat Detectors** – Each unit and all common buildings have ceiling-mounted “hard-wired” smoke and heat detectors that are monitored 24 hours a day by an outside contracted service. The local fire department automatically responds if the system is activated unless they are immediately notified by Hacienda staff that the situation is a confirmed false alarm. *Tampering with these devices is prohibited and doing so can incur charges to the individual homeowner.*
- ❖ **Land-line Telephone Service** – Each unit is wired for an “in-house” telephone system that is much like a hotel system with the ability to call unit-to-unit by using a four-digit extension number. A Hacienda Carmel Phone Directory is published twice per year listing residents alphabetically with their four-digit extension number. Residents may opt-out of being listed in the phone directory if they so choose. By plugging-in a standard “land-line” type telephone, you will automatically have a dial tone. To place a call outside of Hacienda Carmel press “9” and then dial the number you wish to call. There is no charge for calls made within the local 831 area code. However, there is a competitively priced long-distance service included on the phone system for calls outside the 831 area code. Dialing “0” on the land-line phone will connect you with the Hacienda Front Desk during regular hours or with the evening security person on duty between the hours of 9:00 pm and 7:00 am. Please see the “Telephone System” tab in the Membership binder for complete details and instructions on the Hacienda Carmel phone system.
- ❖ **Television & Internet Service** – TV & internet services are the only utilities not included in the monthly maintenance fee and are therefore the responsibility of individual residents. Although residents are permitted to utilize satellite TV services such as “DirecTV,” the infrastructure (regular phone lines) for the accompanying internet service such as “Uverse” is typically not available due to the lack of standard AT&T phone lines throughout the property. However, every unit in the community is pre-wired with Comcast cabling and therefore is generally the best alternative for residents of Hacienda Carmel with the ability to provide TV as well as high-speed internet. For residents moving into Hacienda who already subscribe to Comcast services, it is simply a matter of transferring your existing account to your new address. For new residents without an existing account our recommendation is to visit the Comcast store located at 2440 North Fremont Street in Monterey. If assistance with this process or help is needed with set-up of equipment, please contact the Hacienda business office.
- ❖ **Garbage & Recycling** – An in-ground receptacle for regular household garbage is provided adjacent to the front door of each unit. These cans are emptied every Thursday morning by the Hacienda grounds crew and the plastic bag liner is replaced. Household recycling items should be deposited in the designated blue containers located adjacent to carports 1, 2, 3 & 4, as well as adjacent to the Art Studio and Casa Amigos guest house. The blue recycling containers have signage on the lid with detailed information about what items are or are not recyclable.
- ❖ **Patio Pick-up Service** – Call the Front Desk weekdays before 2:00 pm to let them know you have items placed outside your patio gate and the grounds crew will come by and take them away for disposal at no charge except for certain large items such as appliances, mattresses, televisions, etc. **Please note that paint or any other chemical substances cannot be accepted for patio pick-up service.**
- ❖ **Disposal of Large Items & Electronics** – Residents may request disposal of various large items that would not otherwise be appropriate for Patio Pick-up Service by contacting the Hacienda Front Desk. These items will be picked-up from the Unit by HCCA Grounds or Maintenance staff and taken to the West End dump area until they can be properly disposed of at local facilities. Disposal fees for these items are as follows:

Refrigerators	\$30 each
Microwaves	\$20 each
Televisions/ Computers	\$20 each
Washers/Dryers	\$25 each
Other small appliances	\$15 each
Mattresses (any size)	\$25 each
Sofas	\$25 each
Other furniture items	\$15 to \$25 each depending on size

Facilities & Amenities Information

- ❖ **“Casa Central” Main Clubhouse Building** - Location of the Front Desk and mailboxes, a cozy Lobby Lounge area with gas fireplace, reading area, puzzle table, card tables, complimentary coffee & tea station, Library, Dining Room, Administrative Offices and restrooms. Open every day of the year (including holidays) from 7:00 am to 8:00 pm.
- ❖ **“Casa Fiesta” Auditorium Building** - Site of various forms of entertainment, educational programs, art shows, and miscellaneous social activities throughout the year, as well as providing a site for an indoor Pickleball court when other events are not taking place. Casa Fiesta can be reserved by residents of Hacienda Carmel for private parties subject to availability.
- ❖ **“Casa Amigos” Guest House** – The guest house consists of eleven rooms available by reservation through the Front Desk for family members & visiting guests of residents. Ten standard rooms with a choice of twin, queen or king beds plus one room with separate bedroom and kitchen facilities. Room rates and reservation policies are available by contacting the Front Desk. Payment for guest house stays may be handled by cash, check, credit card or charged to a resident’s monthly billing account.
- ❖ **Dining Room** - Open Tuesday through Saturday for lunch from 11:30 to 2:00 and dinner from 4:30 to 7:00 pm. Sunday Brunch off the menu is served from 10:00 am to 2:00 pm. There is no dinner service on Sunday. Food may also be ordered “to go” for pick-up from the Dining Room or you may request delivery to your unit at no additional cost. Copies of the updated weekly menu are available at the “Information Center” wall rack adjacent to the coffee station as well as on the Hacienda Carmel website. Operation of the Dining Room is contracted to an independent Chef/Operator and as such the serving & kitchen staff are employed by the Chef rather than the Association. Dining tickets may be paid by cash at the time of sale or signed-for by the resident and the charges will appear on the next monthly billing statement. Gratuities may also be paid in cash or written-in on a signed ticket. Payment by credit card is not available for Dining Room charges.
- ❖ **West Room** – Located adjacent to the Dining Room in Casa Central. Available for private luncheons, dinners, card games, meetings, etc. Reservation of the West Room may be done through the Front Desk subject to availability.
- ❖ **Front Desk** – Considered as the “hub” of Hacienda Carmel, services and items available at the Front Desk include distribution of USPS mail, receiving of parcels from FedEx & UPS, postage stamps and USPS flat rate boxes & envelopes, and a postage meter for outgoing parcels up to five pounds. In addition, there is photocopy machine intended for single copies of documents such as medical forms, etc. and a fax machine with a limit of 15 pages.
- ❖ **Shuttle Van Service** - Complimentary shuttle service is available Tuesday through Saturday on a scheduled route that includes stops in downtown Carmel-by-the-Sea as well as stops at the Carmel Rancho & Crossroads shopping centers, (Lucky, Safeway, CVS, Pet Food Express, Union Bank, Chase Bank) plus a special “*express run*” to Trader Joe’s Market in Pacific Grove every Wednesday. Please refer to the shuttle van schedule for specific times. The van departs from the front door of Casa Central.
- ❖ **Security / Resident Services** – Hacienda Carmel employs staff to provide a patrol of the grounds during evening and overnight hours seven days a week, as well as day-time coverage on weekends and holidays. In addition, these staff members also provide other services for residents such as delivery of food orders from the Dining Room and delivery of oversize UPS or FedEx packages, as well as responding to any night time medical issues or other types of emergencies of which they are made aware. Following the nightly closure of Casa Central at 9:00 pm, the Hacienda phone system is forwarded to a cell phone carried by the staff member on duty who can be contacted by simply dialing “0” on the Hacienda land-line phone system.
- ❖ **Information Center** – Located adjacent to the complimentary coffee station in Casa Central, the Information Center consists of a glass display case along with a wall rack containing copies of pertinent Hacienda info such as the Bi-weekly Bulletin, the weekly Dining Room Menu, the most recent Board meeting minutes, as well as flyers for any upcoming events or special issues.

- ❖ **Bulletin Board Room** – Located adjacent to the coffee station and also referred to as “The Paperback Room,” this room contains the bulletin board with “official Association business” information such as Board Meeting agendas, monthly financial reports, etc. posted, as well as a glass case with a section displaying items that residents wish to sell along with another section displaying current real estate listings for Hacienda Carmel. The room also contains a selection of paperback books where residents are free to “bring one – take one” or simply borrow a book and return it later.
- ❖ **Lobby Library** – Staffed by volunteers and featuring a wide variety of literary classics, best sellers & new releases available with a formal check-out system. The Library also gladly accepts donations of gently used books for others to enjoy.
- ❖ **Book Shoppe** – Located across the street from Casa Central adjacent to Laundry Room #3, featuring a wide selection of used hardcover and paperback books at bargain prices. Regular hours are Saturdays from 10:00 to 2:00. All sales proceeds are used to fund the purchase of new books for the Lobby Library. Donations of used books in good condition are gladly accepted.
- ❖ **Swimming Pool** - Open daily from 7:00 am to dusk and heated year-round. Children under the age of sixteen and accompanied by an adult may swim daily after 1:00 pm.
- ❖ **Fitness Room** - Open daily from 7:00 am to 9:00 pm featuring an assortment of equipment including treadmills, elliptical, rowing, stationary cycles, weight machines, stretching cage, free weight area and more. Use of the Fitness Room by guests of residents is limited to those 16 years of age and older.
- ❖ **“The Berm”** - A one-mile trail circling the perimeter of Hacienda Carmel for your walking pleasure. Dogs on-leash are also welcome when accompanied by their owner. Bicycles or other motorized vehicles are not permitted on the berm.
- ❖ **Carports** – There are seven covered carports located throughout the property with a limited number of spaces available. Carport stalls may be rented for a monthly fee as set from time to time by the Board of Directors. Assignment of carport spaces is handled through the Hacienda business office.
- ❖ **Laundry Rooms** – Located in fourteen places throughout the community for the exclusive use of residents only. Open daily from 8:00 am to 8:00 pm. There is no fee for the use of the laundry machines. Washing of pet bedding or blankets is strictly prohibited.
- ❖ **Car Washing Area** – The designated car washing area is located on the west side of Carport 4 next to the street with a hose provided. However, please note that the water provided at the wash station is non-potable well water and may cause spotting.
- ❖ **Art Studio** – A gathering place for Hacienda artists to practice their skills and learn new techniques from one another. The studio is located adjacent to carport #5 and is open for use every day. The Hacienda Art group meets for lunch on the first Wednesday of each month in the Dining Room.
- ❖ **Termite Shop** – A place for woodworking located across from the rear entrance of Casa Central on the north end of carport #1. The shop is available for use daily from 8:00 am to 8:00 pm. The key to the shop may be signed-out from the Front Desk.
- ❖ **Sewing & Crafts Room** – A place for working on a sewing project or various other types of crafts. The room is located adjacent to carport #2 and is open daily from 8:00 am to 8:00pm. The key to the shop may be signed-out from the Front Desk.
- ❖ **Garden Club Area** – A fenced area located on the west end of the property where members of the Garden Club maintain private plots for nurturing fruits, vegetables or their favorite flowers as well as regular gatherings including those without a green thumb who simply wish to enjoy the social aspects.
- ❖ **Barbecue / Picnic Area** – Located at the west end of the property adjacent to the garden area featuring picnic tables with shade umbrellas and a horse-shoe pit. Used for Hacienda community events and may also be reserved in advance for private parties.
- ❖ **Dog Run** – 4,000 square foot fenced area located on the west end of the property where dogs are allowed off-leash for fun and exercise.

- ❖ **Bocce Ball Courts & Lawn Bowling Green** – Located adjacent to Casa Central and available year round for fun and recreation. The key for the equipment storage locker may be checked out from the Front desk.
- ❖ **Putting Green** – Located adjacent to the front parking area of Casa Central, the putting green is available year round to Hacienda residents and guests who wish to hone their short game skills. Putters and golf balls are available to borrow from the sports equipment storage locker mentioned above.
- ❖ **Ping Pong Table** – Located in the “Community Room” adjacent to Laundry Room #14 and available daily. Paddles & balls for ping pong may be checked out from the Front Desk.
- ❖ **Hair Salon** – Located adjacent to Laundry Room #12 and available exclusively for residents and overnight guests by appointment only. Please call Cecile at 831-402-4299 to schedule an appointment.
- ❖ **Doctor’s Office** – Dr. Ronald Villemaire, MD. (General Practitioner specializing in senior medicine) with office hours by appointment only every Tuesday from 8:00 am to noon. Appointments are handled through the Hacienda Front Desk. The doctor’s office is located adjacent to the south end of carport #7.
- ❖ **Therapeutic Massage Service** – Offered by appointment with Larissa McShane, Certified Massage Therapist at the Hacienda Doctor’s Office. Appointments can be made by calling 805-217-6747.
- ❖ **Hacienda Website & Wi-Fi Service** – The Association’s official website is: www.HaciendaCarmel.org and includes a special “Members Only” portal which provides access to certain information. Access to this portal is available upon request thru the Hacienda business office. Wi-Fi service (unsecured) is available within the Casa Central main clubhouse building for use by residents having Wi-Fi ready devices. Guests staying in the Casa Amigos guest house have access to secured Wi-Fi service via a password that may be obtained from the Front Desk.
- ❖ **RV & Trailer Storage Area** – A lighted parking lot area located on the west end of the property where over-size vehicles and trailers may be stored for a monthly fee. Please contact the General Manager for information on availability and rental rates.
- ❖ **Storage Lockers** – A limited number of storage lockers ranging in size from 3’x5’x8’ tall as well as some larger lockers of various sizes are available for rent on a first-come first-served basis. Please contact the General Manager for availability and rates.

Regular Social Activities & Other Events

- ❖ Hacienda Carmel also offers a variety of ongoing regular weekly activities and groups such as the Meditation Group, Line Dance Group, Tai Chi Chih Group, Mah-Jongg Group, RummiKub & other games, Fun Art Class, and Pickleball, just to name a few.

Other social events sponsored by the Hacienda Events & Entertainment Committee

- ❖ **Musical Concerts & Other Performances** – Various forms of entertainment throughout the year featuring a variety of presentations such as vocal groups, classical piano, jazz ensembles, comedy and more. Friends & family are always welcome to attend these complimentary performances that take place on the stage in Casa Fiesta with refreshments following.
- ❖ **Celebrations and Parties** – The Events & Entertainment Committee sponsors several festive events throughout the year including:
 - **Hacienda Birthday Party** each August celebrating Hacienda’s opening in 1962.
 - **Halloween Costume Contest** featuring prizes for Scariest, Funniest & Most Creative costumes.
 - **New Year’s Eve Party** featuring a special dinner menu with live music and dancing prior to ringing-in a “New York New Year’s Celebration” at 9:00 pm.

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Please contact the Hacienda Front Desk or the business office with any questions you may have regarding operations, amenities or any other specific issue.