

# **Hacienda Carmel Community Association**

[www.HaciendaCarmel.org](http://www.HaciendaCarmel.org)

## **Information for Prospective Buyers**

*Updated as of May 1, 2023*

# 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 Federal Senior Housing Residency Requirements.
- ❖ 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 structured as 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 1/300<sup>th</sup> interest in all assets of the community including the buildings, equipment and common areas.
- ❖ Governance of the Association is handled by an elected Board of Directors comprising nine resident Members of the Association each serving a three-year term.
- ❖ Day-to-day operations of the Association are handled by an on-site General Manager along with a staff of 20 full-time and 4 part-time employees. Staffing includes administration, building maintenance, grounds maintenance, housekeeping, and security/resident services.
- ❖ The annual operating budget of the Association for May 1, 2023 to April 30, 2024 is \$4,753,604. 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 Finance Committee and management.
- ❖ All residential buildings are single-level and feature five different floor plans with monthly maintenance fees based upon the size of the unit:

<b>Studio Unit</b>	546 sq. ft.	(38 units)	\$790.00/month as of 05-01-23
<b>1 bed / 1 bath</b>	655 sq. ft.	(71 units)	\$1,049.50/month as of 05-01-23
<b>2 bed / 1 bath</b>	873 sq. ft.	(28 units)	\$1,208.50/month as of 05-01-23
<b>2 bed / 2 bath</b>	948 sq. ft.	(112 units)	\$1,359.50/month as of 05-01-23
<b>“King” 2 bed / 2 bath</b>	1,160sq. ft.	(51 units)	\$1,377.50/month to \$1,515.00 as of 05-01-23
- ❖ Monthly HOA maintenance fees include all utilities (*except for television & internet service*) including a “land line” telephone system with a very competitively priced long-distance service.
- ❖ Monthly maintenance fees also include the cost of upkeep for buildings, grounds & common area as well as all other overhead expenses including staff payroll & benefits, supplies and outside services such as legal, accounting, insurance administration services, etc.
- ❖ 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 **Casa Carmel**, a six-room assisted living facility operated independently by *Central Coast Senior Services* based in Monterey, as well as an on-site Hair Salon.
- ❖ 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 a “Condominium Owner’s Insurance” (HO-6 policy) for coverage of the interior of the dwelling as well as personal property & liability. Homeowners may also purchase an individual flood insurance policy for coverage of personal contents within the unit if desired.

- ❖ A fixed amount of monthly maintenance fees is transferred to a capital reserve fund used for repairs or scheduled replacement of large assets such as roofing, asphalt paving, vehicles, maintenance equipment, kitchen equipment, 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 more than thirty years. The current balance in the Reserve Fund is approximately \$1,200,000.
- ❖ There is a “transfer fee” of \$1,000 charged on the sale of each unit and is typically paid through the escrow process. 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 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 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.
- ❖ Modifications to the unit by Homeowner – Similar to virtually every homeowner’s association, Hacienda Carmel has rules regarding specific modifications to the unit and 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.
- ❖ Rental Policy – In accordance with the Association’s governing documents, not more than 25% of the 300 residential units may be rentals at any given time. Owners are permitted to rent to qualified tenants with a minimum lease period of not less than six months and must be a lease of the entire unit. Short term transient rental of a room or the Unit (such as VRBO or Airbnb) is prohibited.
- ❖ 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.
- ❖ Life at Hacienda Carmel features the opportunity to participate in a variety of activities as well as several planned social events throughout the year including:
  - Weekly activities such as the Easy Yoga, Tai Chi Chih, Pickleball, Meditation Group, Line Dance Group, Mah Jongg & other games, Fun Art Class and more.
  - A variety of events sponsored by Hacienda’s **Events & Entertainment Committee** including musical concerts and other performances such as jazz ensembles, vocal groups, classical piano artists and more. Friends and family are welcome to attend these complimentary performances that take place in the Casa Fiesta auditorium with refreshments following.
  - Celebrations and parties including annual events such as the *Hacienda Birthday Celebration*, the fun & festive *Halloween Costume Contest*, and a *New Year’s Eve Celebration* featuring a special dinner menu and live entertainment prior to ringing-in “New York New Year’s” at 9:00 pm.

- ❖ Life at Hacienda Carmel also features a host of various amenities including the following:
  - A beautiful Dining Room with great food at very reasonable pricing.
  - Swimming pool heated year-round. Open daily 7:00 am to dusk.
  - Fitness room with a wide variety of equipment plus a stretching area.
  - Well stocked library with new selections added on a regular basis.
  - Complimentary shuttle van service to nearby shopping and downtown Carmel.
  - An eleven-room guest house to accommodate visiting family & friends.
  - On-site Hair Salon accommodating both ladies & gentlemen by appointment.
  - Auditorium building with ongoing social and entertainment events.
  - Putting green located adjacent to the main clubhouse building.
  - One-mile walking trail circling the perimeter of the property, known as “The Berm.”
  - Woodworking shop, sewing & crafts room, art studio, and puzzle table.
  - Beautiful Garden Club area with a very active and welcoming group of participants.
  - Community barbecue & picnic area with horseshoe pit.
  - Fenced canine exercise area of approximately 3000 square feet.
  - RV / trailer storage area plus a limited number of on-site storage lockers. (extra fees)
  - Night-time grounds patrol / resident assistance staff. (employed by Hacienda Carmel)
  - On-site community laundry rooms provided with no fees for use.
  - Postage, photocopy & fax services available from the Front Desk. (extra fees)
  - Weekly disposal of household garbage deposited in receptacle adjacent to each unit.

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***Any questions? Please contact the Hacienda Carmel business office Monday through Friday from 8:00 am to 4:30 pm and we will be happy to provide you with any additional information you may need, or to schedule an in-person meeting.***

# HACIENDA CARMEL

