



July 2024 Issue LVI
Carolina Preserve
HOA NEWS

**INSIDE THIS MONTH'S
ISSUE:**

- July Joys¹**
- EMS Service Change at CP 2**
- FAQs 4**
- Community Website Classified Ads 6**
- CP Documents 7**
- What is Traffic Calming? 10**
- Engineering Feasibility Study:
Pickleball 11**
- Financials At A Glance 12**
- Treasurer's Comments 13**
- Carolina Preserve Budget for 2025 14**
- ARC Submissions 15**
- Compliance Corner 16**
- Getting To Know Your Kuester Staff 17**
- Committees 18**
- Board Members 19**
- Mark Your Calendar 19**



The Change in Emergency Management Services (EMS) Support to Carolina Preserve

All of the following information has been received from Chatham County, Wake County, or Cary officials.


Chatham County has announced that their county EMS provider, First Health, will start providing service to our area on July 8, 2024. This will affect most of CP since most of our homes are in Chatham County.

When someone calls EMS (911) for an emergency, an Emergency Management Technician (EMT) shows up to perform the medical work that needs to be done. Typically, a fire truck also shows up and it also has personnel trained as EMTs. In many cases, the fire truck shows up first.

All Cary Fire Stations' personnel are trained as EMTs and respond to 911 calls.

Wake County provides mutual aid "backup" to all of the surrounding counties.

Currently we get our primary support from Cary Fire Station #8 at 408 Mills Park Drive. There is an ambulance stationed there along with Fire Trucks



(with personnel trained as EMTs on them). This ambulance currently has one EMT but a second EMT will be added. This ambulance is already manned by First Health and has been for many months.

Cary plans to build another Fire Station #10 on O'Kelly Chapel Rd. near the CP entrance. It has a high priority for funding and when funded will take about 2-3 years to build. When it is built the ambulance currently at Fire Station #8 will be stationed at Fire Station #10.

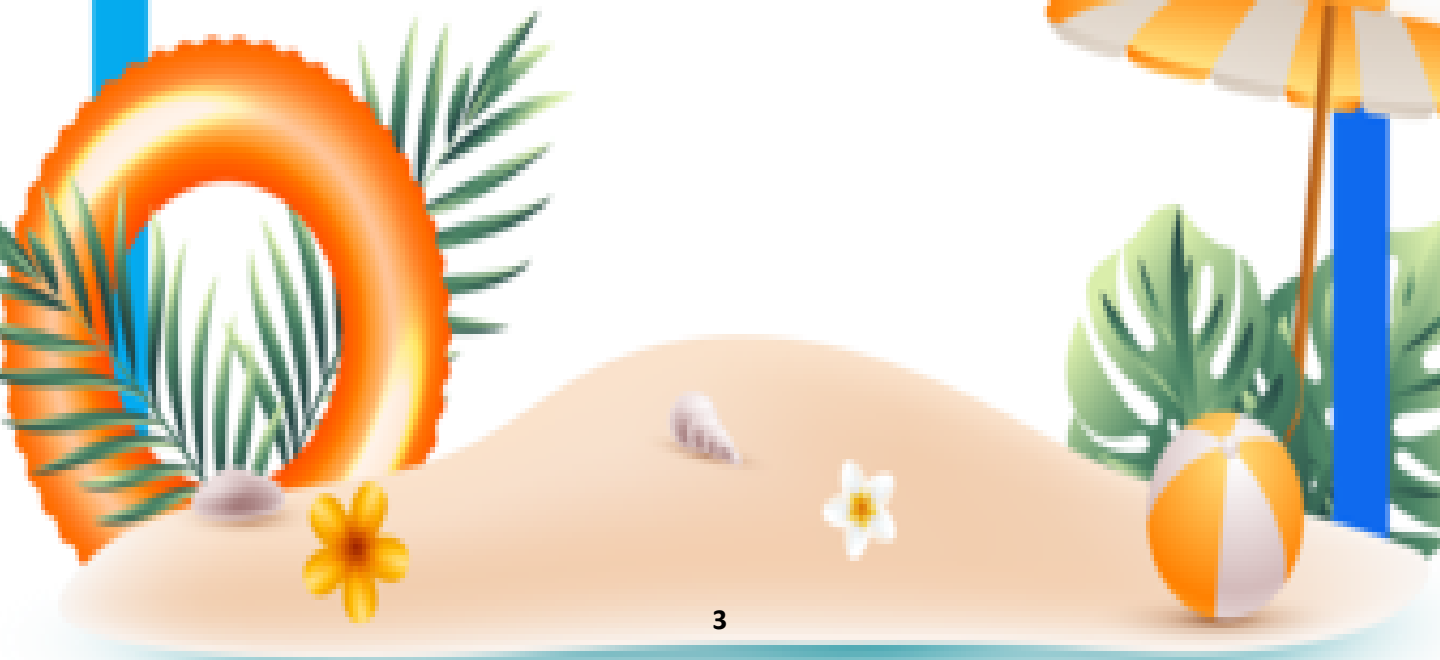
During the period 1/1/2024-6/3/2024 there were only 26 EMS calls in the northeast districts of Chatham County served by Fire Station 8. Only once were 2 calls received at the same time.

Wake County only has 4 other ambulances and the closest one is at Fire Station #5 (2101 High House Rd.) (about 7 miles/13min from CP).

Chatham County closest backup ambulance is at 1441 Farrington Point Rd, Chapel Hill. (about 11 miles/ 17min from CP)

First Health paramedics are trained to recognize the "Vial of Life" program and know to look for a baggie/envelope/folder on the refrigerator.

Anyone that lives in Chatham County and has paid \$60 for Wake County ambulance "insurance" will no longer receive any benefit from it.





I Want to Know... Frequently Asked Questions

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

According to the Reserve Study, the GER2 HVAC system is not due to be replaced until 2025. Why are we replacing it now?

As pointed out in the June Community meeting, the Reserve Study is based on an average of all HVAC components, not necessarily our specific GER2 HVAC system. The board has had multiple discussions on replacing GER2. We have done repairs on the system over the years, and we have asked the opinion of the experts. Do we want to have a system with a 12-16 week lead time go down in the middle of summer, as opposed to leaving one or two years of useable life on the table? This was a tough call – we felt replacing the unit now was the right choice.

Why is there no mention of Pickleball on our external website?

There are several areas where the Carolina Preserve website needs to be updated. This, along with our marketing media, will most likely be the focus of a future task force, as suggested in the recent Strategic Planning focus groups. However, there is an almost four-minute video on our external website that talks about our pickleball courts, the pickleball club, and the fact that living in Amberly gives us access to 4 indoor pickleball courts. In addition, there is a brief history of pickleball included in the video. The video may be found here -> [Pickleball - Carolina Preserve](#)

Again, we will be looking to update our external Marketing Strategy in the near future. While there is no call for a Task Force just yet, if this is something of interest to you, please consider submitting a Volunteer Request Form and stating your interest in helping out with a Marketing Strategy. The link to our volunteer database may be found here -> [CP Needs You - Carolina Preserve at Amberly \(cpamberly.net\)](#)




Why is the Amberly Fountain not working?

The fountain motor is failing. Stormworks is in negotiations with the fountain company to determine whether the motor problem is under warranty and if the cost of repair will be covered under the warranty. The process is taking longer than the Association would like, but the fountain will be back in service in the near future. Please note, the Amberly Fountain is an amenity maintained by the Amberly Master Association and not the Carolina Preserve HOA.

Why was the data in the Community Meeting financial reports two months out of date?

The financials are provided by Kuester to the HOA Treasurer on the 15th of each month, which in this case was over the weekend – two days before the Community Meeting on June 17. Clearly, this short time frame was not sufficient to give us time to analyze the data for May and put it into the PowerPoint. For this reason, end of April financial information was provided to residents at the meeting. Elsewhere in this HOA Newsletter, end of May financial numbers are available in the Treasurer’s Comments.



Did you know that we have a Classified Ads section on our Carolina Preserve resident website?

Once you've logged into the [resident website](#), here's how to proceed:

Go to the menu option for **Marketplace**, then click on [View Classified Ads](#). We have the categories usually expected for Classified Ads (**Merchandise For Sale, Merchandise Wanted, Services Offered** and **Services Wanted**), as well as three specialty ad categories (**Pets, Real Estate** and **Ticket Resales**).

Residents should make any posts relating to Pets, Real Estate or Ticket Sales in the appropriate Classified Ads category, not on the General Topics message board. This will enable other interested residents to find these posts more easily in one place and avoid cluttering the General Topics message board.

If you need help submitting your Classified Ad, go to the menu option for **Help**, then click on [Quick Start Guides](#), and look under **Quick Start Guides for Residents** for the Classified Ads guide. You can easily upload multiple photos and customize how you want to be contacted by interested residents. Be sure to select the correct category for your ad.

If you have any questions, you can submit a [Website HelpDesk Inquiry](#) and someone will respond to help you.

CP Documents

Over the years, the HOA Board has heard numerous complaints and suggestions to improve the useability of the many documents that govern our community. It is true that as an HOA community, we are subject to many entities that have a say in what we do and how we do it. In addition to our own governing documents, the overall Amberly Community, the Town of Cary, the State of North Carolina, and even the Federal Government have a say in how we are governed. In an effort to ease the frustration many residents feel, the HOA Board will be undertaking a project to provide a road map to help navigate through our voluminous governing documentation. In addition to this and subsequent articles, Club Express will be updated with a guide to help point residents to the appropriate documentation. As a reminder, all documentation may currently be found under the Governance tab -> CP Documents menu selection. The [High Level Laws and Rules](#) hyperlink contains our Articles of Incorporation, Covenants, and By Laws. The [Policies and Procedures](#) hyperlink contains not only our current policies, but archived policies, and proposed policies if applicable.

As a reminder, any document may be searched for text or a specific phrase by using the magnifying glass feature on the bottom of the page. If you open up a document and move the cursor anywhere over the page, a little pop-up menu will appear near the bottom. On this menu you can page forward or back, go to a specific page, enlarge the text, rotate the page, or search (the magnifying glass). Simply click on the magnifying glass, enter a word or phrase, and the document will automatically search for all instances of that word. Note it will look for an exact match so single words may be your best search option. Click on the next arrow to find all subsequent matches of that word.

Below you will find brief descriptions and contents of our High Level Laws and Rules. Subsequent articles will discuss our policies and procedures. In addition, we will notify the community when Club Express has been updated with the aforementioned document guide.

ARTICLES OF INCORPORATION

The purpose of this document is to describe the forming of Carolina Preserve as a nonprofit corporation. The document includes:

- Purposes and Powers of the Association
- Membership



- Board of Directors
- Amendment and Dissolution
- Indemnification

DECLARATION OF COVENANTS:

The purpose of this document is to provide a governance structure and a flexible system of standards and procedures for the overall development, expansion, administration, maintenance, and preservation of Carolina Preserve as a master planned community. The document includes:

INTRODUCTION TO THE COMMUNITY

- Creation of the Community
- Concepts and Definitions

CREATION AND MAINTENANCE OF COMMUNITY STANDARDS

- Restrictions Affecting Lots
- Architecture and Landscaping
- Landscaping, Home Maintenance and Repair

COMMUNITY GOVERNANCE AND ADMINISTRATION

- The Association and its Members
- Association Powers and Responsibilities
- Telecommunity
- Association Finances



COMMUNITY DEVELOPMENT

- Activity Cards
- Expansion of the Community
- Additional Rights Reserved to Declarant

PROPERTY RIGHTS WITHIN THE COMMUNITY

- Easements
- Limited Common Areas
- Party Walls and Other Shared Structures

RELATIONSHIPS WITHIN AND OUTSIDE THE COMMUNITY

- Dispute Resolution and Limitation on Litigation
- Mortgagee Provisions

CHANGES IN THE COMMUNITY

- Changes in Ownership of Lots
- Changes in Common Area
- Amendment of Declaration

BYLAWS:

The purpose of this document is to describe how the CP HOA will be governed.

The document includes:

- HOA Generic information
- HOA Membership
- HOA Meetings
- HOA Voting
- HOA Documents
- Board Information
- Board Meetings
- Board Powers and Duties
- Board Officers
- Committees and Task Forces



What is Traffic Calming?



Have you driven down Del Webb Avenue, going at the speed limit, and looked in your rear-view mirror to see someone driving very closely behind you? Seemingly urging you to drive faster? Or had someone pass you on one of our streets? While walking, has crossing a street, even at a marked crosswalk, become a challenge? Are drivers exceeding the speed limit from other neighborhoods just cutting through CP? Or are those drivers actually residents of our neighborhood?

Many CP residents have experienced these problems. So, we contacted the Town of Cary (TOC) who has a program called Traffic Calming. What is Traffic Calming? The TOC website defines it this way: “In the simplest terms, traffic calming endeavors to enhance the livability of our neighborhood streets by reducing vehicle speeds and/or volumes through the use of devices that have demonstrated an ability to produce desired results.” Some potential remedies include lowering the speed limit, installing speed humps, placing barriers to limit cut-through traffic, adding bicycle lanes, and adding pedestrian crosswalks.

At our request, in October of 2023, the TOC performed an analysis of the traffic in CP. This study measured and reviewed the traffic on most streets in our neighborhood. Following the study, they provided to us a detailed and interesting report:

- Very few instances of ticketable driving (defined as 9+ mph over the posted speed limit) were observed.
- Some average speeds did exceed the posted speed limit at some locations on Del Webb, Pittard Sears, Allforth, and Marsalis.
- However, the 85th percentile (a measure of “most” drivers) suggested that persistent speeding was not occurring.

The conclusion reached by the TOC was that there was not a clear and convincing case made for traffic calming remedies, at this time. However, they did agree to consider adding crosswalks and repainting existing crosswalks. And they provided assurance that they would revisit our request in order to consider appropriate remedies to “craft a traffic calming approach that balances the data.”



Meanwhile, as residents of CP, remember that we are a retirement community. Please be mindful of the posted speed limit on our streets, and of pedestrians and cyclists

Engineering Feasibility Study in the Pickleball Area

Pickleball is a sport that is enjoyed by many in Carolina Preserve, and support for the sport is growing in all age groups. It is no longer enjoyed by just the 55+ community. Newer 55+ active communities are being built with a larger number of pickleball courts per resident in an effort to accommodate and attract new residents. Although we have access to court time in Amberly, and access to new courts at McCrimmon park built by the Town of Cary, these courts are not adjacent to our current courts, and are not seen as attractive to potential buyers as opposed to having all the courts in one area, where tournaments and camaraderie would be enjoyed by all as a group.

The Pickleball Club, consisting of almost 350 members has approached the board to consider adding additional courts for the benefit of the entire community, and to add value to all the homes herein. In order to be responsive to their request and recognizing comments from several attendees at the Real Estate Strategic Focus group and several residents at Focus Groups, the Board has decided to retain an engineering firm at low cost to evaluate the areas around the current pickleball courts to determine if it would be even feasible to build additional courts before going any further in their evaluation. The study would evaluate if any wetlands or waterways issues would impede using any of the land around the current courts and would attempt to estimate the potential cost of courts, if feasible.

If found feasible, the board would likely survey the community to determine the level of interest and desire to add courts to keep up with our competitors and would also need to include the cost in the budgeting process after a thorough review of the results.



2024 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)				
	May YTD			Full Year
	Actuals	Budget	Difference	Budget
Income	2,196	2,137	59	5,138
Uses:				
Reserves	(238)	(238)	-	(925)
Expenses	(1,977)	(1,903)	(74)	(4,209)
Net	(19)	(3)	(15)	3

RESERVES + EQUITY (\$000'S)						
	Replacemen t	Villa	IIF	Painting	Oper Resv (Equity)	Tot Reserves +Equity
12/31/2023	1,403	294	3	51	664	2,414
Contributions	225	-	5	8	(19)	219
Interest	22	4	0	1	-	27
Expenses	(140)	-	(10)	-	-	(150)
5/31/2024	1,510	298	(3)	59	645	2,510

Treasurer's Comments

By David Jackson, HOA Treasurer

Resale income was up in May; there were ten recorded resales of houses in CP providing over \$30K in revenue.

We are still getting higher than anticipated interest income from Certificates of Deposit (CDs). One CD matured in May at Live Oak Bank. During the month. We closed our two accounts at Live Oak Bank, transferring the funds to Wells Fargo and North State Bank. We currently have accounts at four banks. To date, we are \$4.6K favorable to budget for operating interest income.

During May, there were high expenses relating to seasonal landscaping (\$275K), landscaping projects (\$19K), slope stabilization (\$15K), and storm water management (\$31K) which related to various improvements in drainage throughout CP. These expenditures are being reviewed by members of the Finance Committee. As a result of the current financials, we are at a net loss of \$19K year to date. However, it should also be noted that current YTD expenses are within 4% of budget.

The Capital Reserve is now at \$1,864K (including replacement, IIF, villa, and painting reserves). The Replacement Reserve funded \$6.5K for architectural design work relating to the locker room renovation. As a result of the month's reported net loss, the Contingency Reserve is now \$645K.

With the progress of the Strategic Planning process, we have begun planning for the budgeting process for 2025.

Occasionally, the Board is challenged by individuals questioning the transparency and currency of financial information. It should be noted that bank statements are received electronically at the beginning of each month and promptly uploaded to our website. Financial information from Kuester is reported to the Treasurer on the 15th day of each month. The Finance Committee meets on the fourth Wednesday of each month. From those sources, reports are generated in as expeditious a manner as possible and provided to CP residents at Board meetings, HOA Newsletters, and on the club express website. We encourage all CP residents to become knowledgeable about sources of financial information available to them.





Carolina Preserve Budget for 2025

Process, Timeline, and Issues

Soon, we will begin the process to prepare the financial budget for 2025. The guidelines for doing this are detailed in the document entitled “Carolina Preserve HOA Financial Policy” which may be found in the Club Express website. The HOA Treasurer, the General Manager, and the Finance Committee are the key participants who will work closely together. Each budget line item will have a Basis of Estimate, which takes into account prior year historical costs, year to date actual amounts, and projected needs for 2025, 2026, and 2027. This process is arduous and time consuming, expected to take most of July and August. The draft budget they put together for the Board will project the income, expenses, and reserve funds needed by CP for three years in advance.

The tentative timeline is as follows:

- HOA Board to finalize the proposed budget – September 17
- Community Budget Review meetings – October 7 & 8
- Community questions and input – week of October 7
- HOA Board to vote on Budget – October 15
- Ratification ballots sent to Homeowners – November 1
- Annual Meeting – November



Factors to be considered will be activities identified in the Strategic Plan process and the Reserve Study completed in 2023, as well as recent budgets and historical data. Additionally, we will take into account the status of whether 2024 projects (e.g., Marsalis, locker rooms, and HVAC replacement at Bradford Hall) have been completed. An important consideration will be the necessary homeowner assessments (i.e., monthly fees) required to support the revenue needed.

The budget process is laborious and time intensive, but necessary in order to operate a place like CP. We wish to thank the members of the management staff and all CP residents who participate in this endeavor.

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!

July is already here! I hope that June was a productive and enjoyable month for everyone! With Memorial Day now behind us and July 4th around the corner, we are definitely in summer season!

In July, from a compliance perspective, our main area of focus will be mulching. For the overwhelming majority of residents, this is not an area of compliance that is of focus because most residents have opted for Yardnique to take care of the yard maintenance requirements. For residents who have opted out, please make sure that there is mulch present in areas where there is no grass, unless you have gotten written approval from ARC to replace the mulch with stones instead.

In ARC, we continue to receive numerous modification requests and Fast Tracks every week. 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 \(MR\)](#)
[Fast Track Form](#)

2. Any work being done on the home should not begin before 8:00a.m.

Finally, as we get into the swing of summer, and begin to use the common areas more frequently, please keep the following in mind:

1. What is a common area? - A common area is that area outside all owners' private property which is owned and maintained by the HOA.
2. No supplies (contractor's equipment, sand, soil, debris, sod, trees, shrubs, etc.) can remain or be stored on a street sidewalk or HOA Common Area overnight.
3. No homeowner's decorations are allowed in the common area.

Finally, last (but certainly not least), we want to make sure we're all on the same page when it comes to trash/recycling can policy: Trash bins cannot be located permanently at the side of the house. They need to be behind the house or in the garage.

Wishing you all a wonderful July!

Your Friendly HOA Compliance Manager,
Patrick

Getting To Know Your Kuester Staff

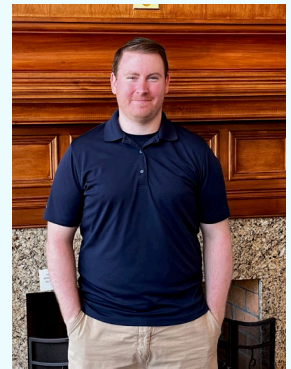
In this month's edition of *Getting To Know Your Kuester Staff*, we are introducing Brian Kelly, the Event Manager's Assistant here at Carolina Preserve. Brian started with us on July 10th of 2023.

Brian was born in Hartford Connecticut and raised in Cary with a brief stop in Texas. Brian graduated from Green Hope High School just up the road, and Wake Tech in East Raleigh with a degree in Network Management.

Prior to coming to Carolina Preserve, Brian was a third shift inventory specialist at Walmart, and was very happy to get (somewhat) regular hours here at Carolina Preserve.

On a personal note, Brian enjoys playing hockey – he played at the High School level – building computers and cooking.

As the Event Manager's Assistant, Brian's duties are similar to Oscar, our Event Manager, in that he is responsible for setting up and breaking down the rooms for all our events, managing the Room Calendar for booking events, and providing consulting and advice to Clubs, Lifestyle, and CP University members on logistics, how to set up and configure the rooms, and A/V possibilities. Brian also has primary responsibility for weekend events.



A typical day for Brian includes:

- Reviewing the day's schedule
- Setting the rooms up as needed
- Meeting with club leaders to review their event requirements
- A/V training where necessary
- Setting up virtual meetings
- Working with clubs in the fall on their schedules for the upcoming year

Brian says his biggest surprise is how busy the clubhouse gets, especially around the November through December timeframe. It seems every one of our 110+ clubs want to have a holiday party!

As you can see, Brian has many responsibilities here at Carolina Preserve. Brian says on a typical day, he is setting up rooms for almost a dozen events. Next time you visit Bradford Hall and see Brian, please say hello and thank him for all he does for our community.

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
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

Board Open Working Meeting
July 16 | 1:00 pm
In person & virtual

Board Open Working Meeting
August 20 | 1:00 pm
In person & virtual
