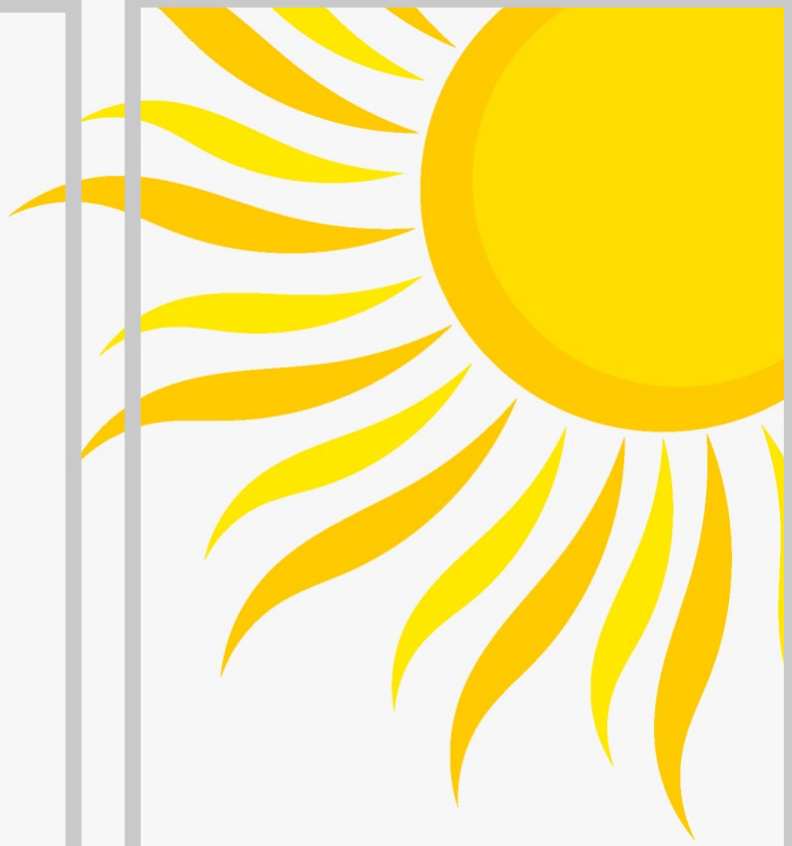




August 2024 Issue LVII
Carolina Preserve
HOA NEWS

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HOA President's Comments

By Sharon Valvona

As we celebrate having some rain during a very hot and relatively dry summer, I want to express my appreciation for the work of the Landscaping Transition Task Force (LTTF) and to our staff working with them. They have spent a number of hours assessing landscape issues within the community, meeting with Yardnique, Hansley and other landscape providers to plan improvements, and talking with residents about their concerns. I especially appreciate LTTF's efforts to reach out to residents for input. As mentioned in the Task Force update, Task Force members have appreciated residents' constructive suggestions and history of problem areas. The update mentions several ways residents will be able to assist with the future work of LTTF and invites interested residents to contact them.

As the LTTF proceeds with its work, the Board and other residents should expect to deal with some truths. First, Carolina Preserve is seventeen years old. It is probably unrealistic to expect that we will be able to restore all screening and other common area plantings exactly the way they were when people first bought their houses. Second, a major replanting effort will require an investment in the cost of the landscape materials and the cost of irrigation. That said, the Board looks forward to ongoing updates from the LTTF regarding their assessments and proposed plans.

On a totally different topic, welcome to the new members of the 2024 Election Task Force (ETF). The first meeting of the ETF will be on August 1st. On behalf of the Board, I would like to thank them for volunteering and accepting an appointment for this very important community service.

I Want to Know... Frequently Asked Questions

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

Why does the Board not respond to all Emails?

The Board makes every effort to respond to resident emails within 5 days. On average, the Board receives between 20 and 30 resident emails each month. Please remember that we are volunteers that do not have regular working hours so when Board members are on vacation or otherwise away, the process may take a bit longer to respond. Every 2 weeks we have a Board member “on-call” who creates a draft response to each email that comes in. The response is circulated to all board members for feedback. When the response is approved, the Secretary creates the response in Club Express and sends to the President or Vice-President for final approval. Once that is granted, the email is released to the resident. Every email response is logged into Club Express for posterity. Please note that there are currently over 300 residents that either have invalid emails in Club Express or have opted not to receive emails from Club Express. Please make sure your email is valid and you have opted to receive emails from Club Express if you are waiting for a Board response. In addition, the Board does not engage in “debates” with residents on the same topic.

The Board is also working on an automated response system to allow residents to know their email has been received while we are formulating an appropriate response. There are also other ways that the Board responds to resident questions such as this “FAQ Column” in each HOA newsletter, and in minutes of the Open Board Meetings.

Is the HOA responsible for repairs to sewer lines that are damaged by street tree roots? If not, do I need to replant a street tree that has been removed due to sewer damage repairs?

Expenses related to sewer line issues on resident property, regardless of the reason, are the responsibility of the homeowner. There is some point of demarcation on the sewer line that determines if the repair is covered by the Town of Cary or by the resident. We encourage you to have conversations with a qualified plumber AND the Town of Cary before undergoing repairs. In addition, there is considerable information on the “Can You Recommend” Message Board from residents who have had similar issues.

Street trees are required, but a variety of species and yard placement can satisfy the Design Guideline requirements. We suggest you reach out to the Architectural Review Committee at Architectural.Committee@cpamberly.net to help you determine what solution would work best for your front yard.

Why are we restricted to only 3 options of shingles to select from in the ARC Design Guidelines if we need to replace our roof?

The Design Guidelines identify three types of shingles for roof replacement if you prefer to complete the Fast Track form. Section 4.25 describes how the Fast Track process enables you to complete the form, submit it to ARC and proceed with roof replacement without waiting for further approvals from ARC.

If another shingle type is desired, a Modification Request (MR) form is required. That means that you need to provide more information to ARC and allow them to assess and approve the MR. You will need to provide a manufacturer's brochure showing the replacement shingle and color, plus an actual sample shingle for ARC to see.

So, you do have the option of selecting from a wider variety of shingles, but it will require a little more time to gather the information and wait for ARC approval. Whichever path you choose for selecting your new roof, be sure that you complete and submit the appropriate request to ARC. DO NOT assume that your contractor is going to do it for you, even if they say that they will handle the paperwork. You are responsible for communication with the ARC.

News in Brief

It was announced at the July 16th Board Open Working meeting that the following people have volunteered and been appointed to the 2024 Election Task Force:

- Darren Chesin
- Colleen Ferner
- Vijay Nair
- Chet Sadosky
- Mike Schwartz

Speaking of elections, the Call for Candidates for the 4 open seats on the 2025-2026 HOA Board will be upon us shortly. This community runs on volunteerism, so please consider running for the Board. Information about the HOA Board may be found on Club Express under the Governance Tab ([HOA Board of Directors 2024 - Carolina Preserve at Amberly \(cpamberly.net\)](#)). Stay tuned for additional information about the HOA Board Election Process.

CP Documents – Part II

In last month's newsletter, we published a guide to our Covenants and By Laws to help navigate through the myriad of documents that help govern our community. If you would like to review that article, please click here: [PowerPoint Presentation](#). In Part II of this article, you can read about the remaining HOA documents. As a reminder, all documentation may 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.

To reiterate tips from the last article, 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 Design Guidelines, HOA Board Operating Procedures, and our numerous policies.

DESIGN GUIDELINES

The purpose of the Design Guidelines is to provide an overall framework to allow the community to develop and progress in an orderly, cohesive, attractive manner, implementing planning concepts and philosophies which are required by regulatory agencies and desirable to homeowners. The Design Guidelines include minimum standards for the design, size, location, style, structure, materials, color, code of architecture, and mode of landscaping and relevant criteria for the construction or addition of improvements and the change or maintenance of existing items of any nature. They also establish a process for a judicious review of proposed new modifications and maintenance of existing items in the community. The document includes:

- Purpose
- Residential Design Guidelines
- Specific Modifications to Landscaping
- Modifications to Residence Structure
- Maintenance Policy
- Design Guidelines Variances
- Architectural Review Committee Appeal Process
- Changes and Amendments to the Design Guidelines
- Non-Liability for Approval of Plans
- Enforcement Instruments

HOA BOD OPERATING PROCEDURES

The purpose of this document is to describe the official rules for the operation of the Board and Committees. The document includes:

- HOA BOD Functions
- HOA BOD Officers, Duties and Requirements
- Meeting Protocol and Procedures
- Community Involvement
- Communication between Board Members and Owners/Residents
- Expenditures
- Chartered Committees
- Volunteerism

FACILITIES USE POLICY

The purpose of this policy is to provide the rules for the use of CP facilities. CP facilities include all CP HOA owned, leased, or provided common areas, buildings, equipment, services, recreational facilities, programs, conveniences, pocket parks, amenities, all streets within CP, ponds, and BMPs or any other items within the CP boundaries. The document includes:

- General Use of Facilities Rules
- Access Rules – Residents and Guests
- Facility Operating Rules
- Facilities Reservation Rules
- Website Usage Rules
- Religious and Cultural Displays and Activities Rules
- Solicitation/Fundraising - Rules
- Outdoor and Natural Areas Usage Rules
- Alcohol Policy for Bradford Hall
- Donation Policy
- Parking Policy
- Estate Sales Rules

FINANCIAL MANAGEMENT POLICY

The purpose of this document is to describe how the CP HOA finances will be managed. The document includes:

- Budgeting Policy
- Authority for Expenditures Policy
- Investment Policy
- Line of Credit Policy
- Operating Contingency Policy
- Replacement Reserve Policy
- Villa Replacement Reserve Policy
- Infrastructure Improvement Fund (IIF) Policy
- Painting Reserve Policy
- Disposal of HOA Property Policy

CLUB OPERATING MANUAL

The purpose of this document is to describe how the CP Clubs will be operated and be managed. The document includes:

- General Information
- Responsibilities
- Establishing a Club
- Membership
- Club Activities
- Lifestyle Support
- Club Financial Policies

COMPLIANCE POLICY

The purpose of this document is to describe the policies and procedures for addressing CP procedural violations of CP rules and policies. It addresses both appeals and sanctions.

STORM WATER MANAGEMENT POLICY

The purpose of this document is to provide a policy and procedures for the Board and Homeowners to resolve storm water management issues on private property or on common area abutting private property.

RECORDS RETENTION POLICY

The purpose of this document is to provide a policy that describes how long specific types of CP records have to be kept.

POLICY RELATED TO BAD DEBT

The purpose of this document is to provide a policy that describes the policy and procedure for governing bad debt which is written off.

POLICY RELATED TO SEVERE AND INCLEMENT WEATHER

The purpose of this document is to provide a policy that describes the policy and procedure for severe and inclement weather communications,

BUSINESS CONTINUITY PLAN AND EMERGENCY RESPONSE OPERATIONS PLAN

The purpose of this document is to provide plans for crisis/emergency management. The plan emphasizes planning for any natural disaster.

INFRASTRUCTURE IMPROVEMENT FUND PROJECT DEVELOPMENT PROCESS AND PROCEDURES

The purpose of this document is to describe how infrastructure improvement projects are managed from the proposal through the implementation (to include funding).

RETAINING WALL MAINTENANCE POLICY AND PROCEDURES

The purpose of this document is to identify Shared Walls and Qualified Walls and describe how they will be maintained by the HOA.



Landscaping Transition Task Force Update

The Landscaping Transition Task Force has been busy meeting with our landscaping contractors and developing plans to execute over the next few months. We're working with Yardnique to make some changes next year to its fertilization and aeration practices. We're still working out the details and may utilize our subgroup of residents who have opted out of some of the available services to trial some new options instead of making wholesale changes for the entire community. Changes will begin next year.

We're developing plans with Hansley to replant sections of the entrances to CP, the Community Park, and Serenity Park. The goal will be to remove dead and invasive plants this summer and to plant new perennials this fall.

We're arranging with Leaf & Limb to provide help to raise the canopy of some of our mature trees to allow more sunlight beneath them and encourage more grass growth. We will try to make this service available at a group rate to residents as well as improving the tree canopies in our common areas. Watch for announcements in the lifestyle newsletter.

Carolina Preserve is now seventeen years old. Its original landscape has undergone changes. Some plants are near or past their useful lifespan. Some have grown much larger and need some changes to be made to accommodate their growth and how they affect surrounding plants. Past landscape management has focused on mowing and trimming. We haven't invested in landscape infrastructure maintenance. It is time to consider investing in some updates to this important component of our community. Our environment is changing, so we need to reconsider the types of plants that are most appropriate to be attractive and resilient in our climate.

As we've been exploring these parks with contractors, we've encountered several interested residents offering constructive suggestions and providing some useful history for the areas. We welcome these contributions. As we progress with new plantings over the next few months the task force will need additional attention from on-the-spot residents who can monitor the progress and alert us of developing concerns. We will need additional people to form local working groups and make this an overall success. If interested, please let us know by emailing to LTF@cpamberly.net



Landscaping Initiative Planning

During the recent Strategic Planning process, Realtors stressed the importance of our common areas, and how their appearance plays a key role in attracting new residents and maintaining our position as one of the premier active adult communities in the Triangle area. About 33% of participants in the resident focus groups voted to prioritize enhanced landscaping in our budgetary planning for the next three years.

The Landscape Transition Task Force has been busy (see separate article) assessing the state of our community common areas and other landscaping issues that impact our appearance. They have been meeting with Landscapers to discuss our needs and adjust their practices with an underlying principle of adding better adapted plants and using more environmentally friendly equipment where cost effective.

Based on the efforts of this Task Force and other landscape work assessment, the Board has reached some initial conclusions:

1. We have landscaping deficits that will require a major replanting effort and possibly a planting-restructure to address. Our current landscape maintenance contracts and budget are primarily focused on maintaining the appearance of existing plants, with minor replacements. These contracts will not be sufficient to address our deficits. Also, a major replanting program cannot be accomplished throughout the year, but requires intensive labor during appropriate planting seasons. Companies currently under maintenance contract with us may not have available staff or available expertise for such a program.
2. Regardless of whether we plant drought resistant plants, all new plants will require irrigation to be established. Our General Manager has been working with our Facilities Manager to evaluate our common area irrigation system. So far, the result is not good news. There are deficits in our common area irrigation systems that must be repaired or replaced if they are to be used to support a major new planting effort. An expensive alternative is to use commercial water trucks until new plants are established. Using water trucks may be a short-term solution, they will not effectively support future planting replacements.

Since this topic came up so frequently in the Strategic Planning Process, and continues to be mentioned in HOA Open Meetings and resident emails, the Board is committed to addressing this issue. Residents should expect to see a focus on landscape replanting efforts and irrigation-related costs included in the 2025-2027 budget planning cycle.

2024 Financials At A Glance

By David Jackson, HOA Treasurer

| OPERATIONS (\$000'S) | | | | |
|----------------------|----------|--------|------------|-----------|
| | June YTD | | | Full Year |
| | Actuals | Budget | Difference | Budget |
| Income | 2,632 | 2,567 | 65 | 5,138 |
| Uses: | | | | |
| Reserves | -325 | -325 | 0 | -925 |
| Expenses | -2,255 | -2,246 | 9 | -4,209 |
| Net | 52 | -4 | 56 | 3 |

| RESERVES + EQUITY (\$000'S) | | | | | | |
|-----------------------------|-------------|-------|-----|----------|-----------|--------------|
| | | | | | Oper Resv | Tot Reserves |
| | Replacement | Villa | IIF | Painting | (Equity) | +Equity |
| 12/31/2023 | 1,403 | 294 | 3 | 51 | 664 | 2,414 |
| Contributions | 310 | 0 | 6 | 9 | 51 | 376 |
| Interest | 27 | 4 | 0 | 1 | 0 | 32 |
| Expenses | -249 | 0 | -4 | 0 | 0 | -253 |
| 6/30/2024 | 1,491 | 298 | 4 | 60 | 715 | 2,569 |

Treasurer's Comments

By David Jackson, HOA Treasurer

Resale income in June was \$11,554, putting us up more than \$33k over budget YTD. This year, there have been 43 recorded resales of houses in CP providing over \$91K in revenue.

We are still getting higher than anticipated interest income from Certificates of Deposit (CDs). During June, three CDs matured and were renewed at 5.2% annual interest. To date, we are \$5.6K favorable to budget for operating interest income. We currently have \$1,587K in CDs, and \$1,197K in money market and checking accounts.

Several high expense items gave rise to a reported operating deficit last month (May). The Finance Committee looked closely at invoices relating to landscaping, slope stabilization, and storm water management. Applying the criteria outlined in the Carolina Preserve HOA Financial Policy, some expenditures were reclassified as properly coming from the Replacement Reserve. As a result, once again, we can now report a positive YTD cash flow for the operating budget at the end of June, in the amount of \$52K.

The Capital Reserve is now at \$1,853K (including replacement, IIF, villa, and painting reserves). The Replacement Reserve funded \$109K in June, including \$100K for slope stabilization and storm water management, and \$6K for tennis court maintenance. The Contingency Reserve is now \$715K.

With the completion of the Strategic Plan, the Finance Committee, the Kuester staff, and the HOA Board of Directors have begun the budgeting process for 2025.

As a reminder, bank statements are received electronically around 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.

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

ARC Makes It Easy For You

A few things that would be good to know if you are contemplating an addition or modification to your yard or exterior of your home or if you are selling your home

- 1. What to do:** Almost all modifications to your home exterior or yard require a Modification Request or Fast Track form to be submitted to the Architectural Review Committee – ARC. What this entails can be found in the Design Guidelines which are available on the CP website.
- 2. New Updates:** Soon, version 8.2 of the Design Guidelines will be updated and published (new version will be 8.3), and it is important to know that there are 61 different changes. Mostly minor revision and clarifications but be sure to revisit them when considering a change to your yard or home exterior.
- 3. Damaged Cable:** Annual aeration of your lawn can cause an issue with buried TV or internet cables. If you are thinking about adding a new service, it would be wise to make sure that when the cable is installed, that the trench is at least 3-4” deep. While ARC doesn’t know the “standard” for this, some in the community have had their cables cut by the aeration, so it would be wise to be sure that the installers don’t cut corners and create a future issue.
- 4. Keeping Records:** If you have submitted a Modification Request or Fast Track in the past, it would be wise to keep copies of the documents as well as the approval letters (for MRs) to pass on to a future homeowner should you ever sell your house. This also applies to Plot Plans. All original owners of homes at CP received Plot Plans from Pulte and they can be very helpful and are required for many exterior projects that homeowners may consider. Many recent new owners didn’t get the Plot Plans from the previous owner, and it can be costly to get a new survey of one’s property. Plot plans show where property lines and easements are located, as well as the footprint of your home.
- 5. ARC On Call:** The Design Guidelines can appear to be a bit intimidating, and it’s common for homeowners to have questions about what they can and can’t do regarding modifications to their homes as well as the process to submit a modification request. ARC always has a member “On Call” to answer questions that a homeowner may have. All you have to do is email ARC: "architectural.committee@cpamberly.net .

Compliance Corner

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

Hello All,

August is upon us! I hope that everyone had an enjoyable 4th of July and hope that everyone is taking advantage of this warm weather to get out and do some outdoor activities! There has been a slowdown in activity in the community as people have gone on vacations and are planning to go on vacation. As I am writing this, Fall is only 70 days away! I trust that everyone is making the most of our remaining summer days.

In August, the area of emphasis is pressure washing! Thank you to the community for stepping up and focusing on this area of compliance, it is hugely appreciated. Keeping mold, stains and dirt away is essential, keep up the splendid work!

Lastly, I want to talk about rubbish and debris. I must say you all do a fantastic job of keeping your yards neat and free of trash (well, **most** of you 😊). Please continue to make sure that trash and recycling is disposed of correctly, in the appropriate bins.

Wishing you all a wonderful August!

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
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
August 20 | 1:00 pm
In person & virtual

Board Open Working Meeting
September 17 | 1:00 pm
In person & virtual
