



October 2024 Issue LIX
Carolina Preserve
HOA NEWS

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HOA President's Comments

By Sharon Valvona

Thank you to the Election Task Force who have been managing and continue to manage our Board Election process. Thank you to the Finance Committee and to our Treasurer. Without their tireless efforts, we would not have the financial health or the carefully crafted budget. Thank you to the Locker Room refurbishment team. They stepped up and very quickly made decisions and suggestions that will benefit many residents who frequent the pool and fitness center. All of these individuals are volunteers who have made time to benefit our community through their efforts.

Carolina Preserve is a community that thrives on volunteerism. It is disappointing that for two years in a row, we have not been able to give residents a choice as to who serves on our HOA Board due to a lack of volunteers. This lack of volunteerism is also visible in our vibrant Club community as several large clubs have folded due to lack of leadership. Please consider volunteering your time to keep our community vibrant, either through club leadership, committee and task force participation, and most importantly, candidacy in next year's HOA Board Elections.



News in Brief

Marsalis Project

Work on the Marsalis retaining wall repair has begun. This project will take approximately 120 days to complete. During the length of the project, Marsalis Way will be closed between Leicester Court and Gillinder Place, Monday through Friday, 6am – 6pm. Marsalis will be opened each evening and weekends. Residents who live on Leicester Court and Gillinder Place will have full access to their streets, though Gillinder Place residents and other residents living in that area will have to use a more round about route to reach their homes. We recognize the inconvenience, but these part-time road closures were the best way to save time and money and to increase safety. Town services such as fire, ambulance, mail, and sanitation have been notified about the closures. Paul Fogg, CP's General Manager, will provide regular announcements and progress reports. Also, look for a Marsalis project page on the CP Website to find information and track the project progress.



Policy Review

At the October Board Open Working Meeting, the Board approved the Project Management and Documentation Procedure and the Request for Proposal Procedure. These new procedures are available for resident review and comment by following this link [Proposed Policies](#). As stated by the Board several times this year, the goal of these procedures is to improve project development, management and tracking. When these procedures were presented and approved at the meeting, both Jeff Diton and John Kasarda expressed their appreciation to Ron Oliveri for his efforts to develop these procedures and shepherd them through the Board review and approval process.

FAQs

Frequently Asked Questions...



What do the Declaration and Design Guidelines say about political signs in the neighborhood?

A political sign may only be posted 45 days before a state or federal election in which citizens of Wake or Chatham Counties are generally permitted to vote and must be removed within seven (7) days after such an election. Political signs may be placed only within an Owner's Lot.

Both the Declaration and Design Guidelines contain language that specify a number and size of signs, but also state "unless any applicable town or county ordinance that regulates the size and number of political signs on residential property allows more signs or larger signs". Per Town of Cary restrictions, the Association will permit eight (8) political signs with the maximum dimensions of 42 inches high and a total area of 5 square feet.

To clarify possible sign dimensions:

Typical 24 X 24 inch signs would equal 4 square feet.

A 24 X 30 inch sign would be 5 square feet or

A 42 X 17.1 inch sign would be 5 square feet.

For the purposes of this provision, "political sign" means a sign that attempts to influence the outcome of an election, including supporting or opposing an issue on the election ballot. Per the covenants, absolutely no flags are allowed to be flown except the United States or North Carolina state flags.

HOA Board of Directors Election Update

It seems for the past several years we've had unusual election seasons here at Carolina Preserve, between covid elections and elections by acclamation. This year is no different as we have had probably the most unusual election to date.

First, when the candidate application deadline for the 2025-2026 HOA Board openings ended on Friday September 20th the Election Task Force (ETF) did not receive enough applications to fill all open positions. The CP Board of Directors did not feel it was in the best interest of the community to elect new board members by acclamation two years in a row nor have a six-member board. The Board unanimously voted to extend the application deadline until the following Friday, after which the normal election process as outlined in the ETF charter would move forward.

Based on discussions with the ETF and resident feedback, the Board subsequently held a majority vote to elect the three residents who submitted their applications as per the original deadline by acclamation, and if any residents came forward in the extra week of applications, they would be elected via a resident election.

Initially we had two residents submit applications and were looking forward to a resident election following our new election process, but subsequently one candidate has withdrawn their application. Therefore, the following four residents **will be elected by acclamation at the November 15th, 2024 Annual Meeting** for the term of January 1, 2025 to December 31, 2026.

Ron Lepionka Spinnaker Court

Robert Muller Altarbrook Drive

Steve Rich Allforth Place

Robert Williams Beckingham Loop

On behalf of the entire community, the Board thanks all the candidates for stepping forward to volunteer their time for the betterment of Carolina Preserve. As it is still important for residents to know the new 2025 – 2026 Board members, the four candidates will have their pictures, applications/bios, and answers to resident questions posted on Club Express.



Locker Rooms

Onofrio Construction is still waiting for Town of Cary construction permits to begin work on the refurbishment of the first-floor locker rooms. The biggest change that residents can expect from this project will be in the shower areas. The shower areas, including the floors, will be completely removed, down to the studs and dirt. Any support damage will be repaired. Each shower area will be completely rebuilt with improvements to prevent future leaks and water damage.

Another significant change will be the room where the lockers are actually located. Our lockers have beautiful wood facing, but on closer inspection they have suffered wear and tear since Bradford Hall was opened. The wood will be preserved, but refinished to restore it's appearance. The team received feedback that users would like more space. Since usage tracking shows that, even when there is a class or organized activity, a relatively small percentage of the lockers are used, the back wall of lockers in each room will be removed and replaced with a bench. Locker checkout will be reorganized to only check out every other locker, with the goal of better spacing. Apologies to anyone whose favorite locker is not included in the rotation. Finally, the carpet in both rooms will be replaced.

One challenge of this project is the concern these major changes are not visible until a resident walks toward the back of this area. An intrepid group of CP residents has taken on the task of choosing the new finishes, i.e., tile, carpet and paint. They have challenged themselves to find cost effective updates (within the scope of the project) that will have a big impact to create a fresh and updated look throughout the space.

Just a reminder, in order to minimize disruption to residents' use of the pool, the construction will be completed by locker room, with a 2-4 day down time for demolition on each locker room. See the September Newsletter for more information about how the project will work. Stay tuned for updates from Paul Fogg, the General Manager, on the start date for this project. Also, look for the link to the project webpage on the CP website.





Budget



David Jackson, our Treasurer and the CP Finance Committee have been hard at work developing the 2025-2027 Budget. It is that time of year when residents will have the opportunity for a first look at the Budget and to submit their questions. Residents are encouraged to attend one of two meetings to review the proposed 2025 HOA Budget.

Monday, October 7 @ 6:30 PM in Bradford Hall

Tuesday, October 8 @ 1:30 PM in Bradford Hall or virtually

Questions can be submitted prior to these meetings by sending them to Finance.Committee@cpamberly.net. The budget team will make every effort answer any questions submitted by 5 PM on Thursday, October 3rd at the budget meetings. Additional questions should be submitted to the same email address as above by 5 PM on Wednesday, October 9th.

Registrations links for the Budget meetings are provided below

[Note: Please log into the community website so that the links work properly.]

[Register to attend October 7, 6:30pm In Person](#)

[Register to attend October 8, 1:30pm In Person](#)

[Register for Virtual Attendance October 8, 1:30pm](#)

Here is a link to the 2025 HOA Budget for review. [Click here](#)

Next Steps in the Budget Timeline are:

- October 15 - Board of Directors Vote on Budget
- November 1 - Budget/Ballot sent to Homeowners for Ratification
- November 17 - Annual Meeting



2024 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)				
	August YTD			Full Year
	Actuals	Budget	Difference	Budget
Income	3,520	3,426	94	5,138
Uses:				
Reserves	-530	-530	0	-925
Expenses	<u>-2,961</u>	<u>-2,900</u>	<u>61</u>	<u>-4,209</u>
Net	29	-4	33	3

RESERVES + EQUITY (\$000'S)						
	Replace- ment	Villa	IIF	Painting	Oper Resv (Equity)	Total Reserves +Equity
12/31/2023	1,403	294	3	51	664	2,414
Contributions	510	0	8	12	29	559
Interest	37	6	0	1	0	44
Expenses	<u>-347</u>	<u>0</u>	<u>-4</u>	<u>0</u>	<u>0</u>	<u>-351</u>
8/31/2024	1,603	300	6	64	693	2,666

Treasurer's Comments

By David Jackson, HOA Treasurer

Through August, there were 63 recorded resales of houses in Carolina Preserve, providing over \$127K in revenue. Resale income for the month was \$13,527, putting us up more than \$45k over budget YTD.

We are still getting higher than expected interest income from Certificates of Deposit (CDs). Two CDs matured in August and were renewed at 4.25% annual interest. We are almost \$8K favorable to the budget for operating interest income. We currently have \$1.6M in CDs, and almost \$1.2M in money market and checking accounts, providing good financial stability for the community.

The Capital Reserve is now at \$1,973K (including replacement, IIF, villa, and painting reserves). There were no expenditures from reserve accounts during August. The Contingency Reserve is now \$693K.

It was pointed out recently that not everyone knows what IIF means. IIF is Infrastructure Improvement Fund. An infrastructure improvement is a new amenity, a major improvement, or an addition to an existing amenity that will increase the HOA property's value, enhance usefulness, or create new recreational, social or operational capabilities, (per our Financial Policy document). A recent example would be the Pavilion.

As a reminder, bank statements are received electronically at the beginning of each month and promptly uploaded in Club Express. 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 at Board meetings and HOA Newsletters. Also, Club Express provides a thorough financial picture, including income statements, balance sheets, and bank statements. We encourage all CP residents to become knowledgeable about sources of financial information available to them.

BUDGET

Regarding the budget: an eblast was sent to all residents with the proposed budget for next year. Please review that information closely. Community presentations will be conducted on October 7 and October 8 to provide a more detailed discussion of the budget and to answer questions from residents.



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,

October is here! We are fully into election season, and as I'm writing this, we are only *42 days* (exactly 6 weeks) away from Election Day (but who's counting? 😊).

In the month of October, I'll be focusing on street trees, mulch and making sure that everyone is following the rules as it pertains to political signs. As I mentioned in my last article, political signs are currently permitted to be displayed, which went into effect Sunday, September 21. Political signs can be displayed in your yard from September 21, 2024, through to the end of day, Tuesday, November 12, 2024.

In October, the area of emphasis is street trees. (Again, Patrick? Yes!) Here are a few things to keep in mind as it pertains to street trees:

1. Street trees must be a minimum of 8 feet tall, with a minimum trunk caliper/diameter of 2 "in diameter.
2. Please check the Design Guidelines for the list of approved trees prior to replacing a street tree (Section 3.3.25)
3. The ARC will conduct timely post audits on all street tree replacements to verify that the minimum initial height requirements and minimum caliper requirements indicated herein have been adhered to by the homeowner.
4. **Unless there are extenuating circumstances, approved by the Town of Cary and signed off by ARC, every home in Carolina Preserve must have a street tree.**

Wishing you all a wonderful October!

Your Friendly ARC & Compliance Coordinator,
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

Bob Griffith
Member at Large

Mark Your Calendar



Board Open Working Meeting
October 15 | 1:00 pm
In person & virtual

Board Open Working Meeting
November 15 | 6:30 pm
In person & virtual

Board Open Working Meeting
December 15 | 1:00 pm
In person & virtual