



September 2024 Issue LVIII

# Carolina Preserve

## HOA NEWS

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*Good  
Neighbors.*



*Make Good  
Friends*

## HOA President's Comments

*By Sharon Valvona*

Summer has been very toasty this year. With the Labor Day holiday behind us, many of us are looking forward to enjoying cooler weather in the coming days.

As we enter the last third of the year, how satisfying it has been to be able to announce that two important projects will soon be starting. The contract for the Marsalis Project has been awarded and though we don't yet have an exact start date, we do hope it will be completed by the end of the year. Similarly, demolition of the first locker room in the next couple of weeks will be the start of that project. Check out the News in Brief section for more information on how these projects will work and stay tuned for regular announcements and updates from our General Manager, Paul Fogg, about start dates and closures that might affect your planning.

September also brings the start of the Board of Directors election process. Thank you, once again, to the Election Task Force and their hard work in managing this process. There will be four open positions for the 2025 Board that will be filled in this election. We have many experienced, capable people living here in Carolina Preserve. Regardless of how long you have lived in our community, I hope you will give serious consideration to running for one of these rewarding positions.



## News in Brief

### Bradford Hall Locker Rooms

The repair and refurbishing of the showers and locker areas of all the upstairs locker rooms in Bradford Hall will be under way in the next few weeks. At their recent Open Meeting, the Board of Directors approved a contract with Onofrio Construction to complete the work. The women's, men's and the family locker rooms on the first floor of Bradford are included in the plan.

In order to minimize disruption to residents' use of the pool, the construction will be completed by locker room. So, for example, Onofrio will start with the men's locker room. It will take 2-4 days for demolition inside the locker room and to remove scrap materials out to a construction dumpster in the parking lot. The pool will be closed during this time because of noise and because a section of the pool deck will be cordoned off to create the most direct path from the locker room, out the side door of the pool to the dumpster outside. When the pool reopens after the demolition days, men will have the option to use the downstairs locker rooms to dress and store their clothing. The family locker room will remain available for showers, since the project does not remove the Chatham County requirement that residents shower before they enter the pool.

The above process will be repeated for the women's locker room. When both the men's and the women's locker rooms are completed, the family locker room work will be completed. This approach was determined to maximize resident access to the pool during the construction process. Residents should be looking for regular communications from the General Manager as each phase progresses for information about pool closing days and project progress. The whole project is expected to be completed by the end of November.

### Marsalis Project

As announced in the August Board Open Working meeting, the construction project to rebuild the area around the Marsalis Culvert will be underway shortly. The Board has selected Aqualis as the company to complete the work. The expected project duration is four months. Take a look back at the April HOA Newsletter for details of the construction approach.

In order to save time and money and to increase safety, the Board has agreed to part-time road closures between Leicester Court and Gillinder Place. During the majority of the project, residents who use Marsalis Road should expect the road closures on this section of Marsalis from 6 am to 6 pm, Monday through Friday. 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.

The project is in its early kick-off stages, so please wait to ask questions about road closure dates. Expect numerous and regular announcements from CP's General Manager, Paul Fogg, to keep residents posted on what to expect when the project planning is further along.

## Policy Review

As announced at the August Board Open Working Meeting, both the Facilities Use Policy and the Design Guidelines have been reviewed by the Board of Directors. Changes to the Design Guidelines were proposed by the Architectural Review Committee and further modified after Board consideration. Changes to the Facilities Use Policy were recommended after an internal Board review. Proposed changes received initial approval at the August meeting and residents were invited to review the changes and provide comments by September 16. Residents can access the policy changes in the Proposed Policies Folder by following this link [Proposed Policies](#).



## I Want to Know...

### Frequently Asked Questions

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

#### **Who is responsible for replacing dead bushes and maintaining trees in a buffer area?**

When properties adjoin each other, it is helpful for neighbors to discuss opportunities to maintain the value of their common properties. These discussions need not be confrontational and should go a long way to resolving your concerns.

Dead bushes are the responsibility of the property owner, including those in the buffer zone. The responsibility for trimming the tree is on the owner of the tree. If the owner does not trim the tree and it presents a threat to your home, you are in your rights to trim the branches back to the property line. Similarly, if surface roots are causing you problems in your yard, you can cut them back to the property line.

Again, we emphasize that discussion with neighbors should be the first choice of action to address your concerns.

#### **Is the Volunteer Database being utilized by the HOA Board?**

Absolutely! When soliciting members for the Landscaping and Election Task Forces, the first thing the Board did was review the Volunteer Database for potential Task Force members. Continuing to advocate the importance of the Volunteer Database shows up in our Strategic Plan under both Superior Governance and Improved Activities and Programs.

Again, the Volunteer Database does not commit a resident to any task force, committee, or sub-committee. It merely is a tool for residents to state their areas of expertise that the Board, Lifestyle, and other groups may reference when looking for help or volunteers for a specific activity. The Volunteer Database may be found on the home page of Club Express under "Our Community" - [CP Needs You - Carolina Preserve at Amberly \(cpamberly.net\)](http://cpamberly.net)



# Election Task Force Charter Changes


One of the first activities undertaken by the 2024 Election Task Force (ETF) in preparation for the upcoming Board elections was to review the ETF Charter approved by the Board earlier this year. As a result of that review, the ETF suggested several Charter changes to the Board, whereby residents will see some changes in this year's Board Election procedures as compared with previous years.

First, the ETF recommended using an outside company to conduct the electronic voting.

The Board had earlier decided against this approach because of the increased cost involved and concerns about sharing resident data with a third party. This suggestion was previously raised in the context of vague claims and innuendo that staff and/or ETF members had improperly accessed election information or could have changed election results. The Board rejected these unfounded claims. Because of the excellent record of well-run elections by previous ETFs' and staff, the Board chose not to incur what it considered an unnecessary additional expense.

The 2024 ETF's recommendation was not based on inference about improper past access to election data. Rather, they made the case for use of a third party to manage Board election electronic voting as best practice for HOAs. Their recommendation was supported by research done into possible companies by our Management Staff and information about how other communities are conducting their Board elections. The Board was advised by our legal counsel that the sharing data of did not present a problem and confirmed that many other communities use this approach. Therefore, we agreed with the ETF recommendation that utilizing an outside company to manage our elections will best support our Strategic Plan pillars of Operational Excellence and Superior Governance. Based on this better-founded argument, the Board approved the use of a third-party vendor to conduct the Board Election electronic voting. However, to keep costs as low as possible, the Board will continue to use current tools like Club Express and Survey Monkey for votes leading up to the annual meeting or for Lifestyle surveys.

Management of paper ballots will also change. The ETF recommended using a two-envelope process which includes a "secrecy envelope" to ensure that a resident's paper ballot vote remains anonymous during the counting process. More detail about this process




and other changes to managing paper ballots have been outlined in the ETF Charter posted on the CP Website (or [click here](#)).

There were some recommended changes that the Board did not approve, though the Board requested alternatives to accomplish the ETF's intended goals.

The ETF recommended changes to the charter to expand informal opportunities for residents to directly ask Board candidates their individual questions. Though the Board members continue to be concerned about intrusive and inappropriate campaigning, they felt ETF made an excellent point about the need for more informal interaction between candidates and residents. In that spirit, the Board requested the addition of an ETF sponsored event where residents can meet candidates informally, ask their specific questions and hear answers given by the candidates.

Finally, the ETF raised privacy concerns with the required question that was added three years ago to the ETF charter: "Have you had Carolina Preserve violations adjudicated against you since being a resident of Carolina Preserve? If yes, please describe to the community the nature of the Carolina Preserve violation. Also, did your violation or any other action you have taken or threatened to take, incur attorney costs for Carolina Preserve?". The Board has confirmed there are no privacy legal issues with Board candidates being asked this question. Additionally, the Declaration of Covenants and NC statutes do not require the Board to keep HOA violations or other resident/owner interactions with the Board private. The Board typically chooses not to share violations or violation follow-up as a courtesy to our residents. However, this question is more about transparency and this Board agrees with previous Boards that if a resident has cost the HOA legal fees through their actions, this is an important consideration for an individual's fitness to serve as a director. A resident is expected to answer truthfully and in doing so, has the opportunity to present his or her point of view of any violation or legal fees.

The Board appreciates all the work the ETF has done so far, and looks forward to a smooth and successful election process. All residents please review the ETF's "Call for Candidates" and seriously consider running for the 2025-2026 HOA Board. It is certainly healthier for the community to have a choice of candidates rather than appointing Board members through acclimation as we did last year. New residents should also consider running for the Board. We have 3 returning Board Members to coach you through the learning curve, and this community thrives on new ideas and volunteerism.



## Carolina Preserve Strategic Planning

The development of Carolina Preserve's 2024-2026 Strategic Plan is now complete. The HOA Board would once again like to thank the residents who participated in the Strategic Planning focus groups, and those who provided feedback and further suggestions to the Board this past month. We'd also like to thank the members of Kuester staff and the local realtors who provided input into the plan as well.

The Board has reviewed all the tactical milestones that comprise our "roadmap", and developed high level timing and dollar estimates for each milestone. In previous review sessions, the Board assigned priorities and owners to each of the suggestions as well. The output from the review sessions was presented to our Treasurer/Finance Committee, who will incorporate the dollar amounts into the appropriate place in our Community's Budget.

As a reminder, our Strategic Plan has existed since 2017 for the purpose of setting goals and tactical objectives for the Community over a three-year horizon. The plan is updated bi-annually and serves as a road map that charts where and what CP will be attempting to accomplish. Our Strategic Plan sets us apart from other communities, and was the primary reason we were deemed a "Community of Excellence" by the North Carolina Community Associations Institute. The Plan discusses our Mission, Vision, and Core Values, and places the almost fifty tactical milestones of this year's plan in one of five key drivers – Superior Governance, Financial Strength, Improved Activities and Programs, Enhanced Infrastructure, and Operational Excellence.

The latest version of our Strategic Plan along with supporting documentation may be found here: [Strategic Plan Documents](#), or by going to the *Governance* tab on Club Express and selecting *CP Strategic Planning*.

Stay tuned for further information on our Budget.





## Tree Pruning

The Task Force is trying to provide homeowners with options to improve the vegetation under some of our majestic mature trees. Large trees in a neighborhood are an asset to the community. We've noticed many large trees suppress grass growth under them, so we're looking for solutions.

After consulting with arborists from Leaf & Limb (leaflimb.com) we were convinced that raising the canopy (1/3 trunk and 2/3 canopy) of many of the bigger trees would improve the sunlight and moisture availability to the grass. A survey was conducted to determine resident interest. The response of homeowners to prune their trees was overwhelming. A group price was negotiated, but we needed to focus only on street trees in order to finish this year. Pruning will begin at the end of September and continue through October. The parks and other common areas will also be included.

That's the first step and hopefully, it will be enough to improve grass growth under the rain shadow of many trees. However, in some cases, a second step may be necessary. Grass will not grow from bare soil and protruding tree roots. In those cases, it will help to build a small border around the tree extending well beyond the trunk. The radius will be defined by the presence of tree roots and/or bare ground. The addition of some soil and compost will prepare the newly defined space for any of several ground covers to beautify the area. The green thumb members of the LTTF are working on developing a list of drought-resistant ground covers to serve this purpose and beautify your yard. It will be found on our CP website next month.

***Landscape Transition Task Force***

lfff@cpamberly.net

# 2024 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)				
	July YTD			Full Year
	Actuals	Budget	Difference	Budget
Income	3,079	2,997	83	5,138
Uses:				
Reserves	-423	-423	0	-925
Expenses	<u>-2,607</u>	<u>-2,577</u>	<u>-30</u>	<u>-4,209</u>
Net	50	-3	46	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
Contributio ns	405	0	7	11	50	473
Interest	32	5	0	1	0	38
Expenses	<u>-347</u>	<u>0</u>	<u>-4</u>	<u>0</u>	<u>0</u>	<u>-351</u>
7/31/2024	1,493	299	5	62	714	2,574

# Treasurer's Comments

By David Jackson, HOA Treasurer

Through July, there were 56 recorded resales of houses in Carolina Preserve, providing over \$114K in revenue. Resale income for the month was \$22,424, putting us up more than \$44k over budget YTD.

We are still getting higher than anticipated interest income from Certificates of Deposit (CDs). One CD recently matured and was renewed at 4.95% annual interest. We are \$6.7K favorable to budget for operating interest income. We currently have \$1,592K in CDs, and \$1,208K in money market and checking accounts, providing good financial stability for the community.

The Finance Committee, the General Manager, and the Treasurer look closely at invoices (especially, landscaping, slope stabilization, and storm water management.) Applying the criteria outlined in the Carolina Preserve HOA Financial Policy, it is ensured that expenditures are classified properly coming from the Replacement Reserve or from the Operating Budget. As the financial report indicates, we are well within the budget guidelines at this point in the year.

The Capital Reserve is now at \$1,859K (including replacement, IIF, villa, and painting reserves). The Replacement Reserve funded \$101K in July for an HVAC replacement in Bradford Hall. The Contingency Reserve is now \$714K.

With the completion of the Strategic Plan, the Finance Committee, the Kuester staff, and the HOA Board of Directors are presently heavily involved in the budgeting process.

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 15<sup>th</sup> 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 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.



# 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 2<sup>nd</sup> & 4<sup>th</sup> 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](mailto:Architectural.Committee@cpamberly.net)

or

Patrick Dzimiri, Compliance Coordinator: [compliance@cpamberly.net](mailto: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](mailto:compliance@cpamberly.net)

Hello All,


September is here! With that, summer is pretty much done. Well, Summer does *officially* end on September 22, so we still have a few weeks, but as far as warm weather is concerned and being able to enjoy the warm weather, the countdown has begun. I hope everyone gets a chance to make the most of the season.

In September, the area of emphasis is the least controversial topic of all: politics 😊. More specifically, political signs and the community rules surrounding the posting of political signs. Please remember:

1. **General Election Day is Tuesday, November 5**
2. Political signs may be posted starting 45 days before a federal or state Election Day and up to 7 days after. Here are dates to pay attention to as it pertains to our community:
  - a. **Political signs can be displayed starting Saturday, September 21, 2024**
  - b. **Political signs must be taken down by end of day Tuesday, November 12, 2024.**
3. If a violation is issued regarding a political sign that is hung outside the permitted timeframe, **please do not take this personally or as a judgement of your political beliefs. I'm simply enforcing Carolina Preserve Community Policy. Thank you in advance for your cooperation!!!**

Finally, some general policies to keep in mind:

1. ARC meets twice a month, the 2<sup>nd</sup> and 4<sup>th</sup> Wednesdays of the month. Submissions are due 1 week prior by 12 noon. ARC submissions can be placed in the black ARC box located outside the Bradford Hall main entrance, emailed to me at [compliance@cpamberly.net](mailto:compliance@cpamberly.net), or dropped off at the Bradford Hall front desk.
2. Garage sales are strictly prohibited.
3. Dead shrubs located in the Buffer Area:  
Contrary to popular opinion, dead shrubs that are in the Buffer Area are the responsibility of the homeowner. The homeowner must replace any dead shrubs in the Buffer Areas.

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4. Drainage Projects- At ARC, we've received many Drainage Project requests over the last month so here are a couple things to keep in mind:
    - a. Please complete a modification request (MR) form and be sure to obtain your immediate neighbors' signatures.
    - b. In addition to the MR form, please also submit a plot plan. [The Design Guidelines](#) explain the steps that must be completed to get this request processed.
    - c. Finally, please download the Drainage Sheet that can be found on the community website which needs to go to the contractor for completion, along with the scope of work which should all be submitted to ARC.
  5. Finally, if you have violation concerns, please address them with Carolina Preserve ([compliance@cpamberly.net](mailto:compliance@cpamberly.net)), as opposed to addressing fellow residents. There are specific policies and procedures that must be followed in addressing violations or potential violations.

Wishing you all a wonderful September!

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

**Bob Griffith**  
Member at Large

# Mark Your Calendar

**Board Open Working Meeting**  
**September 24 | 1:00 pm**  
In person & virtual

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

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

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