



July 2023 XLIV  
**Carolina Preserve**  
**HOA NEWS**

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**Civility  
starts  
with us.**

**We've adopted the Community  
Association Civility Pledge**



**WE ARE A COMMUNITY WHERE  
NEIGHBORS LISTEN + RESPECT**

**HOA President's  
Comments**

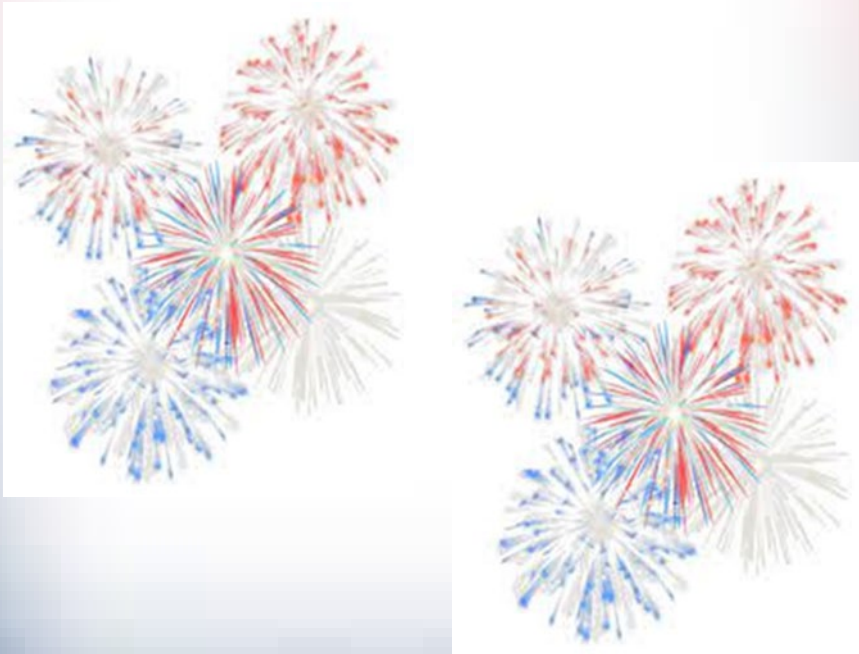
***By Judy Nixon***

*July*

I hope everyone is enjoying the summer and the activities warm weather and sunshine brings. For the HOA Board, in addition to ongoing projects, summer starts a whirlwind of planning work for the next year. Over the coming months, the Board will be engaged in budget planning, establishing charters and membership in 2024 standing committees, reviewing task force recommendations, and making decisions on how to move forward with those recommendations. But the Board is not alone in the upcoming work. You, the community, must also be engaged in all the foregoing and participate by volunteering and providing us with constructive input for the Board to consider in its decision-making. So, get your calendars out and be sure to attend upcoming meetings identified later in this newsletter to keep informed. If you have been reading this newsletter, perhaps you noticed that since about March there have been articles written by members of the standing committees explaining their mission and committee responsibilities. These articles are designed to give you the information you may need to decide whether to volunteer to be a committee member. We have also been providing information about the goals of the task forces to inform you of the subject matter recommendations the Board will be considering. You have been kept apprised of budget matters via meetings and this newsletter to acquaint you with factors that affect budget planning in addition to the HOA's fiscal condition. The Board recognizes the importance of keeping you informed of HOA matters so you can make informed decisions and provide constructive input. Here are some specifics on upcoming events.

Committees establish their memberships in the fall of each year so submit your applications via the Volunteer form found on the CP website under the "Resident Services" tab if you are interested in being a committee member. The HOA Standing Committees are Finance, Information Technology, Lifestyle, Clubs and Groups, and Architectural Review. HOA elections will be held in October, but before then, the Board will hold an informational meeting explaining the role of Board members, Board responsibilities and

answer any questions you may have about being a Board member. Residents interested in running for the three Board seats to be filled, will have to submit candidacy paperwork, complete questionnaires, and participate in a “Meet the Candidates” forum over the next several months. The Board will begin its budget planning work this month, establishing goals for 2024 upon which to base the budget. The Board Treasurer, Jerry Warren, will provide two community 2024 budget presentations in early October to answer questions and address comments before the Board votes on the proposed budget at its October Open Board Working Meeting. The Annual Meeting will be held November 21<sup>st</sup>, to ratify the 2024 budget and introduce the newly elected HOA Board members. So, keep informed, attend meetings, and read the HOA Newsletter. The pace has picked up and there’s a lot happening until the end of the year. We want you to be a part of all of it.



## I Want to Know... Frequently Asked Questions

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

**Q:** What is meant by “hybrid modality [sic]?”

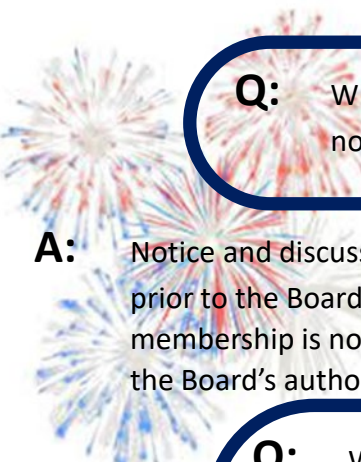
**A:** Hybrid modality is technology to allow for in-person and virtual attendance simultaneously at meetings and other events. The HOA is researching and hopefully will find a hybrid technology that will allow for meetings to be held in-person and virtually to extend the reach of HOA information to more CP residents and owners and expand attendance and participation in community matters.

**Q:** You presented at the May community meeting information about the mailbox project and how it has improved curb appeal. But curb appeal consists of many other factors other than just mailboxes, such as lawns.

**A:** We agree that curb appeal involves everyone keeping their property maintained, not just the mailboxes. The Community meeting report was on a Task Force’s work on its specific mission and its completion of that mission, not a limitation of residents’ maintenance responsibilities as provided under the Design Guidelines.

**Q:** Did the Board ask for volunteers for the Election Task Force (ETF)?

**A:** Yes. The June 2023, HOA Newsletter solicited volunteers for the ETF and provided contact information to indicate their interest.



**Q:** Why were volunteers for the ETF approved “without any notice or discussion by the community”?

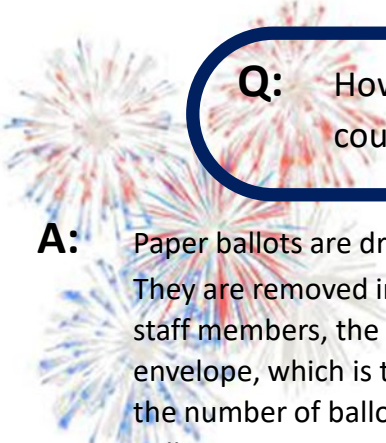
**A:** Notice and discussion by the community pertaining to volunteers prior to the Board’s appointment of task force or committee membership is not required. Membership appointments are within the Board’s authority.

**Q:** Will an outside service be used to collect and count votes, as many residents have suggested?

**A:** First, the Board responds to questions and suggestions submitted to the Board by individual residents and owners. To date, the Board has not received this suggestion from any other individual residents or owners as is claimed.

As to the question, in the June 2023 HOA Newsletter, the “President’s Comments” included an explanation of the election process for all CP residents and owners. Here is an excerpt of that article:

*HOA Board elections are conducted by an independent Election Task Force, made up of resident volunteers who are not running for any Board position and are not related to anyone running for a Board position or currently on the Board to avoid any perceived conflict of interest. Votes are cast electronically via Survey Monkey, a third-party contractor, or via written ballot which are available at the Bradford Hall front desk during the voting period. Only owners can vote and only one vote per candidate / per household is permitted. All paper ballots submitted are counted by the Election Task Force members and added to the tallies provided by Survey Monkey, after verifying that there are no duplicate ballots. All votes are retained in CP records permanently. Since CP has been governed by owner elected Boards of Directors for approximately eleven years, there have not been any disputes or questions raised as to the efficiency, effectiveness, or legitimacy of Board elections; the process works.*



**Q:** How do we know that all paper ballots are counted?

**A:** Paper ballots are dropped into a secure receptacle at Bradford Hall. They are removed in the presence of two ETF and/or Management staff members, the number of ballots counted and placed in an envelope, which is then sealed and initialed by the individuals, with the number of ballots the envelope contains written on the outside. Ballots are NEVER viewed for specific votes cast. The envelope is documented to ensure all envelopes are accounted for at the time votes are counted. The envelopes are stored in a secured drawer until voting closes. Sealed envelopes are not opened by anyone except for the ETF members at the time the votes are counted. All ETF members are present and involved in counting votes and verifying the vote tallies. This process works as explained above.





## CP News in Brief

July 2023

MONTHLY UPDATES

Vol 2 Issue 7

### Town of Cary Town Hall at Carolina Preserve

On Thursday, July 6, 2023, from 6:30 to 8:00 pm, the Carolina Preserve HOA will host the Cary Mayor, Harold Weinbrecht, District D Councilmember, Ryan Eades and At-Large Councilmember, Lori Bush. The Mayor and Councilmembers will present a State of Cary report, providing residents with an overview of the town's demographic information, ongoing projects, and future initiatives. The presentation will be followed by a Q&A session providing residents an opportunity to engage with the speakers and gain further insights. The Town Hall will be held in the Bradford Hall ballrooms.

### In-Person Meetings are Back


While the HOA explores viable hybrid technologies to provide residents with in-person and virtual attendance experiences for Board meetings and other events, the Board has decided it is time to resume in-person meetings. Starting in July 2023, Open Board Working Meetings will be held in person in the Bradford Hall ballrooms from 11:00 am to 12:00 pm the third Tuesday of the month. The September Community Meeting, on September 18, 2023, from 6:30-8:00 pm, will also be in-person and will take the place of the September Open Board Working Meeting. The November Annual Meeting will continue to be held virtually to promote the most attendance and reduce HOA costs. When meetings are announced, residents will be asked to pre-register, whether attending in person or virtually (if the meeting is hybrid). This is for purposes of seating set up. If you are attending in person, **you must arrive before the 11:00 am** start of the meeting and check in at the door. Doors will open around 10:40 am. Some additional seating will be afforded for those who may not have pre-registered, but it will be limited. Because these are Board of Directors meetings, the doors will close promptly at 11:00 am. Late arrivals can view the meeting recording or attend virtually, if pre-registered to do so. The Board meeting will start on time and disruptions due to late arrivals will not be permitted.



## **Update Your Email Address With Kuester– It’s Important!**

In the May 2023, HOA Newsletter, the Board emphasized the importance of residents and owners confirming that their email addresses with Kuester were correct and updating their email addresses, if needed. We also encouraged strongly that owners who did not have an email on file or blocked receiving emails from the HOA, to remove the block and to have a current email on file with Kuester to receive important HOA information, vote on the budget and HOA elections. If you have not done so, please, provide a current email address to Kuester. The HOA is moving towards going paperless, to the extent possible, to save money, have owners/residents receive expedient notifications, and to be more environmentally conscious as part of its “Go-Green” initiative.

To address those goals, the HOA will be using owners’ emails to electronically send out the November 21, 2023, Annual Meeting notification with 2024 budget information and a voting link to ratify the budget and approve the IRS notice. To be clear, if you have an email on file, you will only receive electronic notification; you will NOT receive a hard copy of the documents. Owners who do not have emails on file with Kuester will be mailed by first class mail, hard copy notices with budget information and a paper ballot. But, as we all experienced last year, once the hard copies are mailed, the HOA does not have control of postal delivery and any delivery delays that may occur. Absent any other exigent circumstance, the Annual Meeting this year will not be rescheduled due to postal delivery delays. As always, there will be hard ballot copies available at Bradford Hall for those who wish to vote by paper ballot and 2024 budget information will be posted on the CP website for everyone’s access and information. To update, unblock or submit your current email to Kuester, go to: <https://kuester.com>.





## Mark Your Calendars

As indicated in the President’s Comments, the remainder of this year will be busy and your participation and attendance at upcoming meetings is very important. Unless indicated otherwise, meetings will be in-person. In addition to regular Open Board Working Meetings held the third Tuesday of each month, 11:00 am – 12:00 pm, here are additional dates to mark on your calendars:

- July 6, 2023: Town of Cary Town Hall, 6:30 - 8:00 pm, Ballrooms
- August 15, 2023: HOA Board Election Presentation, 6:30 - 8:00 pm, Varsity Room
- September 18, 2023: HOA Board Community Meeting, 6:30 - 8:00 pm, Ballrooms  
(This meeting is in lieu of the Tuesday Open Board Working Mtg.)
- October 11, 2023: 2024 Budget Presentations, 10:00 am -12:30 pm (in-person)  
6:30 - 8:00 pm (virtual)
- October 17, 2023: Open Board Working Meeting, 11am -12:00 pm, Ballrooms  
(Board will vote on 2024 budget)
- November 21, 2023: HOA Annual Meeting **(Virtual)** 6:30 – 8:00 pm

Additional dates that will be announced, once determined, will include the Meet the Candidates forum and HOA Board elections. Stay informed; attend meetings, read the newsletters and eblasts that will go out.

## Community Comments Requested

At the June 20<sup>th</sup> Open Board Working Meeting, two proposed governing documents were presented that the Board is considering. The first is a revision to Section 3.3.15 “Mailboxes” of the Design Guidelines, adding maintenance responsibilities for string trimmer protection covers. Also included is information as to how to replace mailboxes and the string trimmer protection, if necessary. The second document is “CP Violations, Appeal and Sanctions Policy and Procedures” that will apply to HOA resident/owner procedural violations. The purpose is to clarify the compliance enforcement procedures in place if a resident/owner is cited for a procedural violation of the CP governing documents. Before voting on both documents, the Board is providing the CP community with a 30-day period to review the proposed documents and submit to the Board any comments before the Board votes at its July Open Board Working Meeting. During that meeting the Board will discuss any comments received and the final documents that will be voted upon. The proposed documents can be found in the supporting documents attached to the June 20<sup>th</sup> meeting on the CP website homepage under “HOA”.

## Go Green Task Force Update

The seven members of the Go Green Task Force have hit the ground running. As you may recall, our mission, as directed by the Board, is to identify areas in which we can Go Green, to make recommendations regarding landscaping practices, and to follow items in the Strategic Plan regarding Go Green initiatives. Our initial focus is toward community lawn management and community plantings, recycling and energy consumption in Bradford Hall and throughout CP.

What exactly does it mean to Go Green, we have been asked. Primarily it is becoming more environmentally aware and changing our behavior and lifestyle to reduce the amount of pollution and waste we generate. Green also means money, and we are keeping an eye on that dimension, as well.

We are placing articles in the weekly Lifestyle Newsletter in order to keep everyone aware of our activities. We are seeking input from residents, as well, regarding their ideas. Last time we counted, we had received 23 messages from residents with their ideas.

So, keep sending us your ideas, which you can do by emailing us at

[Go.Green@cpamberly.net](mailto:Go.Green@cpamberly.net)



# 2023 Financials At A Glance

By Jerry Warren, HOA Treasurer

OPERATIONS (\$000'S)				
	May YTD			Full Year
	Actuals	Budget	B/(W) Budget	Budget
Income	2,047	2,038	9	4,900
Uses:				
Reserves	(241)	(223)	(19)	(875)
Expenses	(1,769)	(1,839)	69	(4,046)
Net	36	(23)	59	(21)

expenses

(W) Is a negative number: lower income or higher Expenses

RESERVES + EQUITY (\$000'S)						
	Replacement	Villa	IIF	Painting	Oper Resv (Equity)	Tot Reserves +Equity
12/31/2022	1,050	310	102	41	638	2,141
Contributions	210	-	24	8	36	278
Interest	9	2	-	-	-	11
Expenses	(341)	-	(111)	(7)	-	(459)
5/31/2023	928	312	15	42	674	1,971

# Treasurer's Comments

By Jerry Warren, HOA Treasurer

May revenues were \$419K, \$11K over Budget due to higher resales fees (+7K), Lifestyle fees (+\$3K) and interest income (+\$1K as we get more income from higher yields on our investment CD's). Expenses were \$80K under Budget due to -\$51K lower landscape costs (-\$57K seasonal mulch expenses previously billed in April and +\$6K retaining wall expenses), -\$14K maintenance expenses (primarily -\$11K tennis resurfacing costs postponed to later in year and -\$2K HVAC expenses), -\$7K Services (-\$5K audit fee not yet billed and -\$2K legal fees), -\$4K G&A expenses, and -\$4K Villa expenses. This resulted in monthly net of \$86K, \$91K over Budget for May and \$59K favorable YTD. As mentioned last month, these variances are primarily due to timing differences as they swing positive and negative month to month. Our re-forecast for the year still remains close to Budget.

Resale fees were \$7K above Budget in May, continuing a favorable trend with eight home sales. Resales are now only \$4K below Budget on a YTD basis. So far there have been seven resales in June month-to-date.

The Replacement reserve is now at \$928K, down \$67K from last month. This month's major expense items were \$41K for stormwater management, \$23K for the indoor pool renovation, \$4K for design work on locker room renovations, \$3K for the Marsalis project, and \$7K for other miscellaneous projects.



Financials

# ARC Makes it Easy for You

Why is There an ARC?

From the current Charter:

**Purpose:**

*The mission of the committee is to have exclusive responsibility to assess and act upon all homeowner applications for modifications to the exterior of their homes and their lots in Carolina Preserve consistent with the Approved Design Guidelines and subject to oversight by the Carolina Preserve Homeowners Association Board of Directors (“BOD”)*

*The committee provides advice and support to the BOD on Strategic matters and advice to the General Manager and Operations Director on Operational matters.*

With that said, the ARC (made up of community volunteers) has the primary oversight for exterior home and yard improvements. “Oversight” is limited to assisting homeowners with their projects to see that they conform to the Design Guidelines. ARC members volunteer for ARC because we take pride in the way our community looks and want it to continue looking great (we all want big resale values). Plus, we as seniors want to do as much as possible to keep our brains active as a matter of continued fitness and happiness as well as establishing friendships with our fellow committee and community members.

Clearly, not everyone in the community agrees with all of the elements in the Design Guidelines, or how ARC manages its responsibilities. But it’s the nature of all Del Webb communities, and every homeowner has agreed to all of the rules and regulations set forth by the HOA and we all must adhere to them, like it or not.

All of the Design Guidelines and occasional revisions are approved by the Board. Most updates occur because ARC found it necessary to modify or clarify the DGs because of repetitive issues that surface. Plus, where possible, we try to simplify the DGs to make it easier for the community to understand as well as simplifying the process, i.e., “Fast Tracks”.

## ARC Makes it Easy for You

### Why is There an ARC?

In the second paragraph from the Charter above, ARC's relationship with Management (Kuester employees) is to work together to clarify issues and to help homeowners solve problems. However, if a homeowner violates a Guideline, Management and the Board work together to resolve the issue. ARC's involvement is limited to doing "post audits" to check to see if the homeowner completed their project and to be sure that it conformed to the approved Modification Request or Fast Track. If there is an issue, Management is informed. When projects are completed, homeowners should contact ARC.

As we understand it, the Board is working on the violation process to make it as equitable and as expedient as possible so that resolutions don't drag on for an extended period of time.

This is repetitive, but it's really helpful if homeowners do their due diligence and read through the Design Guidelines when considering a project, and then if questions remain, that's the time to email the ARC for help. You can find the DGs on the community web page under: "Governance; CP Documents; Design Guidelines". There is no reason to contact management (Kuester) or the Board for assistance or for the completed project notification. ARC is your contact point, as there is always an ARC member "on call" to assist. Email: [architectural.committee@cpamberly.net](mailto:architectural.committee@cpamberly.net)

# Architectural Submissions

Everything you need to know for Architectural Submissions

Robert Hamilton is your staff liaison to the ARC Committee and will be processing all architectural request submissions.

He can be reached at [RobertH@Kuester.com](mailto:RobertH@Kuester.com)

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.

**If you email your request, it must be in PDF form and not by a picture from your phone or JPEG.**

# Community Service at CP



By Tom Croft

## NW Community Church Volunteers Demonstrated “Love Thy Neighbor” at Carolina Preserve

Saturday morning, June 3<sup>rd</sup>, about 50 volunteers served our neighbors in Carolina Preserve.

After a 3-year COVID hiatus, we resumed where we left off. We helped more than 45 residents with “lifting heavy stuff and ladder work.” We flipped mattresses, cleaned ceiling fan blades, changed smoke alarm batteries and other odd jobs. Besides doing lots of tasks, we heard residents’ stories and prayed with them.

A couple of their comments reflect their appreciation.

*“They were so helpful, kind and respectful. It’s so heartwarming to see families working together and liking it.”*

*“The guys that came were just the perfect ones to wrestle with my mattress - physically fit and strong!!”*

*“Thank you, they really brightened my day”*

*“I can’t thank your church enough.”*

*“Thank you so much.”*

There will be more opportunities to serve at Carolina Preserve.





# Committee News




## CGAC Marches On to Help Clubs

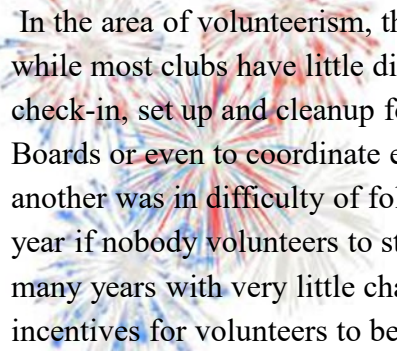
*By Joel Glassman*

Your CGAC (Clubs and Groups Advisory Committee) continues to meet monthly on the second Tuesday to discuss issues that affect the clubs at Carolina Preserve.

We continue to update the club and facilities use manuals as needed and requested by the HOA. We also respond to club requests when we feel we can assist. The CGAC, along with Event Manager Oscar Esperanza, held a new audio-visual training workshop to show clubs how to most effectively use the equipment and lights available in the ballrooms for their events. It is always recommended that club representatives meet with Oscar to review their needs prior to any events.

This year we held a survey to determine club needs in the areas of website training and volunteerism. While most clubs have simple methods for communicating with their members, several requested training on how to use the website for a variety of needs. As a result of our survey, CGAC worked with the IT committee to set up a training session where helpful information on how to use the website to best communicate with their members, how to set up events and advertise them with graphics to their members via the control panel and how to find help when needed was shared. We thank the IT committee for their assistance and hope to continue to work with them in the future.



A decorative graphic of colorful fireworks in shades of red, white, and blue, exploding in the upper left corner of the page.

In the area of volunteerism, the most vital area to the clubs, our survey told us that, while most clubs have little difficulty obtaining volunteers to help with things like check-in, set up and cleanup for events, clubs are not getting people to serve on their Boards or even to coordinate events. We know that one large club has already folded, another was in difficulty of folding recently and a third may possibly fold after this year if nobody volunteers to step up. Many club Boards have had the same people for many years with very little change. Our survey told us that clubs do not provide incentives for volunteers to be on their Boards though they are constantly asking for people to volunteer. Clubs think that a workshop or articles explaining the various duties of Board members might be helpful and we will look into that this summer. Some clubs have held meetings or special events to attempt to solicit volunteers with limited results. The CGAC has published articles on volunteering in the past and will do everything we can to assist in this matter in the future. We have to hope that, with many new residents moving into our community, that several will want to get involved and volunteer in the near future. CGAC is also looking into a Volunteer Fair.

Clubs are always welcome to contact the CGAC members with any items requiring our assistance. If necessary, we may be able to have a club representative attend one of our meetings to discuss the item. Remember that we are here for you and the community.



# 2023 Committees

## Architectural Review Committee

Steve Botha | John Bongino | Elizabeth Diton | Bill Gurecki

Claire Hammitt | Ken Merten

Board Liaison: David Jackson | Staff Liaison: Robert Hamilton

## Club & Group Advisor Committee

Wanda Abel | Claudia Clissold | Joel Glassman | Cynthia Jackson

Cara Lehman | Francine McElhinney | Marie Milazzo

Paulette Shekell | Sandra Stein

Board Liaison: Robert Griffith | Staff Liaison: Laurene Adkins

## Finance Committee

Dennis Curtin | Steve Harrison | Don Ferranti | Dennis Hefner

John Kasarda | Rahul Parikh | Paul Wolf | Ted Young

Board Liaison: Jerry Warren | Staff Liaison: Christine Hast

## Information Technology Committee

Jean Curtin | Dennis Curtin | Alan DeCrane | Brian Dos Santos

Sally Longinotti | Margaret Horst

Amy Levine | Robert Willenberg

Board Liaison: Sharon Valvona | Staff Liaison: Glenda Hunter

## Lifestyle Advisory Committee

Harlean Botha | Alora Burton | Marianne Frisch

Jackie Millslagle | Louise Stanley | David Streifford

Gayle Streifford | Lynnette Womble

Board Liaison: Jeff Diton | Staff Liaison: Terrie Murray

## 2023 Board

**Judith Nixon**  
President

**Robert Griffith**  
Vice President

**Sharon Valvona**  
Secretary

**Jerry Warren**  
Treasurer

**Jeff Diton**  
Assistant Secretary

**David Jackson**  
Member at Large

**Ron Oliveri**  
Member at Large

## Mark Your Calendar

**Town of Cary Town Hall**  
July 6 | 6:30pm, Ballrooms

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**HOA BOD Open Working Meeting**  
July 18 | 11:00am, In Person

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**HOA Board Election Presentation**  
August 15 | 6:30pm, Varsity Room

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**HOA Community Meeting**  
September 18 | 6:30pm,  
Ballrooms

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**2024 Budget Presentations**  
October 11 | 10am, In Person  
October 11 | 6:30pm, Virtual

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**HOA BOD Open Working Meeting**  
October 17 | 11:00am, Ballrooms  
(Board vote on 2024 budget)

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**HOA BOD Annual Meeting**  
November 21 | 6:30pm, Virtual