



December 2023 XLIX  
**Carolina Preserve**  
**HOA NEWS**

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## HOA President's Comments

*By Judy Nixon*

As the year approaches its ending, we celebrate this month various holidays devoted to miracles, births, enlightenment and bounty. It's a reminder that regardless of what has passed, there is renewal and new opportunities awaiting us in the new year. Here at Carolina Preserve (CP) we look forward to a new HOA Board of Directors in 2024 and all that they hope to accomplish and achieve. We will have new CP management staff who will bring new management styles and strong project management and maintenance skills that will add to an already strong resident services staff. Committees will welcome new membership and get to work on providing this community with new activities and programs. As each year ends, the new year brings new opportunities for each of us. Speaking of which...

This is my last article as President and my contributions to the HOA Newsletter in general. It has been a privilege to serve the CP community over the past two years and I thank you for your support. Although a lot was accomplished during my tenure, there is more to do and I have confidence the 2024 HOA Board is up to the task. I have been fortunate and honored to get to know and work with Board members who put the CP community first and were accomplished individuals in their own right during their careers. I have learned a lot from them. Although I was Board President, the Board operated as a cooperative body, with each member providing input and approval to every Board decision made. Without them, the community accomplishments over the past two years would not have been possible. But the past two years have not all been rosy.

There are those in this community, albeit a small but vocal minority, who seem to thrive on controversy, dividing this community and spreading negativity, making the Board's job very difficult and distracting us from the work before us. These residents seem comfortable behind their computer keyboards sending vitriolic emails to the Board and its individual members implying we have nefarious motives in what we do even though as residents, we too are affected by the same Board decisions. They assert we don't know what we are doing, and they have all the answers. Well, if that's true, come out from behind your computers and run for something, whether it is the HOA Board or applying for committee membership. I strongly believe the CP community is not served well when it does not have a choice of who is elected to the Board; there is a wealth of experience and knowledge in this community, and we need more candidates to run for the Board. However, based on conversations with owners, the harassment and disrespect shown Board members is why when asked to run for the Board, many say no. My hope for the future of this community is twofold. First, most of this community who support the Board should be more vocal in their support. Second, Board members are volunteers and your neighbors; they deserve respect for seeking to serve the CP community. By doing so, perhaps more owners will step forward and run. Remember, we can disagree without being disagreeable. As for me, thank you for the opportunity to serve the CP community these past two years.





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

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

**Q: Why can't the HOA put a mailbox outside Bradford Hall?**

**A:** The United States Postal Service (USPS) determines where it places mailboxes. It is our understanding that the HOA made this request several years ago and the USPS declined that request. However, there is a USPS mailbox at the Amberly Clubhouse back parking lot, just across Yates Store Road.

**Q: Can CP residents leave their mail at the Bradford Hall front desk to be picked up by the mail carrier when HOA mail is delivered there?**

**A:** It is not appropriate for front desk staff to be responsible for residents' mail to be picked up by the mail carrier, particularly if the mail includes checks.

**Q: Who receives emails sent to [gm@cpamberly.net](mailto:gm@cpamberly.net)?**

**A:** Since Ms. Hast, the former general manager, left, the email address [gm@cpamberly.net](mailto:gm@cpamberly.net) is monitored by Bradford Hall staff and the temporary general manager, Chris Chaffin. Please use that email address to contact Bradford Hall management.

**Q: Can the HOA Board consider updating Bradford Hall furnishings and seating in and around the CP neighborhoods?**

**A:** When the 2024 HOA Board holds strategic planning discussions next year pertaining to community improvements and what can be accomplished within the 2024 Budget, your suggestions will be considered.



**Q: Does Carolina Preserve have a noise ordinance?**

**A:** Carolina Preserve does not have a Noise Ordinance Policy. The HOA follows the Noise Ordinance of the Town of Cary. From the Town of Cary website:

**Who enforces the town's noise regulations?**

The Town of Cary Noise Ordinance is regulated by the Police Department. If you would like to alert the town to a potential noise violation, please call the Police Department non-emergency number at (919) 469-4012.

**Q: I attend a water aerobics class. Can the temperature in the pool be made warmer? Also, can the ambient temperature in the indoor pool area also be made warmer? Too cool water may not be good for seniors over 65 years of age. We have taken the temperature each week and it has been 83-84 degrees. An article we read said the temperature should be a minimum of 86 degrees but we would be happy with 85 degrees especially as winter is coming. Also, it is recommended that the air in the pool area be 2 degrees warmer than the pool - Mostly it's been 79-82 degrees.**

**A:** The indoor pool temperature is regulated by a gas boiler and will at times fluctuate between 82 and 85 degrees, especially as overnight temperatures drop and days are cooler. For example, in the morning at 8:00 am the temperature can be 84 degrees and by the afternoon can be 85 degrees. Additionally, there are many members in the community who use the pool for lap swimming, kids swim and walkers. Those pool users send emails about their concerns that the water is too hot for their use. Every effort is made by the contracted pool company to accommodate all residents who use the indoor pool on a daily basis.



### 2023 Carolina Preserve Annual Meeting Recap

On November 21, 2023, the Carolina Preserve HOA virtually held its 2023 Annual Meeting. Over 183 owners and residents registered. Results of owner balloting to approve the 2022 Annual Meeting Minutes, the 2024 Budget and the IRS Ruling 70-604 were reported. There were 378 ballots submitted, with 372 voting to approve the 2022 Annual Meeting minutes, 370 approving the IRS Ruling and 342 approving the 2024 Budget. The Board also reported on the state of Carolina Preserve, which is good, fiscally, and operationally. Over the past two years, rather than developing new projects, the Boards have focused on accomplishing Strategic Planning goals established by the CP community in 2022 and refurbishing, maintaining and improving existing CP facilities and amenities. Of the Strategic Planning objectives for 2022-2023, almost 90% have been completed. Of the specific 2023 Goals and Objectives announced to the community in February 2023, all but four have been completed or are ongoing. The four ongoing projects include Bocce court resurfacing, Marsalis retaining wall repairs, renovation of the main level locker rooms, and the Bradford Hall Pavilion. Explanations of the status of those projects were provided during the meeting and can be viewed on the Annual Meeting recording posted to the CP website. The Board encourages those who were unable to attend the Annual Meeting, to view the recording for more information.

### Board Approves Election by Acclamation to 2024 HOA Board

During the Annual Meeting, the Board approved an Election by Acclamation of 2024 HOA Board members. Because the number of candidates was equal to the number of vacancies, there was no need to conduct an election. One vacancy was due to a Board resignation leaving a year remaining on that Board term. Three vacancies were for two-year terms. The following are the candidates elected by acclamation: Sharon Valvona volunteered to complete the one-year term, Ron Madl, Stanley Levine and John Kasarda will fill the three two-year terms. All terms start on January 1, 2024. The Board welcomes the 2024 HOA Board members.

### Status of Filling Vacant CP Management Positions

November 15, 2023, was Christine Hast's last day as the CP General Manager. Kuester and the Board have been actively searching and interviewing candidates for the General Manager and Facilities Manager positions. While some offers have been made, unfortunately, there have not been any acceptances to date. While the GM position is vacant, Chris Chaffin, a Kuester corporate manager, will sit in at the position. This is not the first time Chris has stepped into the role of temporary GM. When Amberly Master changed its property management company to Kuester, he acted as temporary property manager until a permanent property manager was hired. Not only did he do a phenomenal job for Amberly Master, Kuester searching for the right person to fill that position resulted in hiring a very competent and enthusiastic property manager who has already contributed to significant Amberly Master improvements. The Board believes that when the right people are found for the Facilities Manager and General Manager positions, the result will be the same for Carolina Preserve.



## CP News in Brief



### **Emphasis on CP Resident Compliance with HOA Rules**

In response to owner and resident concerns about lack of resident compliance with HOA governing documents and rules, the 2023 Board decided to revert to the original staffing scheme and hired a Compliance Manager. While the title is different, pre-COVID, CP had an assistant general manager, who was responsible for monitoring resident compliance, citing violations if found and managing and processing ARC modification requests. When that person left, rather than refill the position, the responsibilities were assumed by the Facilities Manager. Unfortunately, perhaps due to the increased workload, the compliance aspect of the position was not performed at the same level as when there was an assistant manager. Now there is a Compliance Manager, Patrick Dzmiri, whose responsibilities, among other duties, are dedicated to monitoring resident and owner compliance. The Board is confident community compliance concerns will be addressed in keeping CP the community of excellence it is. Of course, since there has not been an emphasis on compliance over the last several years, it may come as a shock to some when or if they receive a violation notice. To not be taken by surprise, the Board suggests that residents and owners review the Facilities Use Policy and Design Guidelines to ensure the rules are being followed. Also, review the Compliance Policy that was approved by the Board in August 2023, so you are familiar with the compliance process and procedures. All the foregoing documents can be found on the CP website under the Governance Tab/CP Documents/Policies and Procedures.

### **Bocce Courts Resurfacing**

Resurfacing of the bocce courts began on Friday, November 17, 2023. It may take a few weeks for the work to be completed because it is weather dependent. Please do not use the courts that are being resurfaced. The Board has asked members of the bocce club to look at the courts when the work is complete to provide feedback to the Board and Management as to the quality of the work. We appreciate their contribution to successful project completion and look forward to their feedback.

# 2023 Financials At A Glance

By Jerry Warren, HOA Treasurer

OPERATIONS (\$000'S)				
	October YTD			Full Year Budget
	Actuals	Budget	B/(W) Budget	
Income	4,135	4,086	50	4,900
Uses:				
Reserves	(724)	(695)	(29)	(875)
Expenses	(3,372)	(3,417)	45	(4,046)
Net	39	(27)	66	(21)

**Note B/(W) means: B is a positive number: higher income or lower 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	670	-	39	15	39	763
Interest	20	6	1	1	-	28
Expenses	(523)	(24)	(138)	(7)	-	(692)
10/31/2023	1,217	292	4	50	677	2,240



# Treasurer's Comments

By Jerry Warren, HOA Treasurer



October revenues were \$422K, \$12K over Budget primarily due to \$7K higher resale fees, \$2K Lifestyle revenues, and \$1K interest income. Expenses were \$16K under Budget primarily due to \$23K lower landscape expenses (normal monthly variances) offset by \$5K higher maintenance costs and \$4K higher utilities. This resulted in monthly net of \$26K, \$28K over Budget for October and \$66K favorable YTD. As mentioned previously, these variances are primarily due to timing differences as they swing positive and negative month to month. Our re-forecast for the year is now slightly above Budget.

Resale fees were \$7K over Budget in October with seven home sales. Resales are \$9K over Budget on a YTD basis. So far there have been three resales in November month-to-date.

The Replacement reserve is now at \$1,217K, up \$69K from last month. This month's major expense item was \$24K for stormwater management.





# 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)



# GO GREEN



A significant recommendation of the Go Green Task Force report is to provide useful information to residents. One way in which this is being done is through articles they provide in the weekly Lifestyle Newsletter. The most recent articles provide useful information about weatherizing our homes. Actions are suggested, such as sealing air leaks, installing or adding insulation, and replacing lighting with energy-efficient bulbs.

As we move into winter weather, keeping our homes warm and comfortable is advantageous to us. Not to mention keeping our utility bills reasonable. Useful actions that you can do yourself are provided, many at very low cost. Links to additional information are provided, as well. Look for these articles in upcoming editions of the Lifestyle Newsletter.

[go.green@cpamberly.net](mailto:go.green@cpamberly.net)





## CP Dedicated Volunteers

By Jeff Diton

When my wife and I decided to retire to North Carolina, the only people we knew in the state were our realtor and the manager of the airport Hilton Garden Inn. Therefore, it was important for us to find a community with an active clubhouse with many clubs, providing an opportunity to meet people with similar interests as ours. When we visited Carolina Preserve, the friendly person at the front desk gave us a list of all the clubs we had here. After seeing that list we were sold. Having lived here four years now, our Clubs and Groups continue to be one of the best, if not THE best, amenity at Carolina Preserve. That's why the HOA Board is recognizing all the **Club and Group Leaders** as our CP Dedicated Volunteers of the month.

At last glance, we have 114 Clubs and Groups here at Carolina Preserve. Every club has at least a President/Main Coordinator. Most clubs have a Vice President/Second Coordinator. Many clubs also have a Secretary and a Treasurer, and some clubs even have Other Leaders. That's an awful lot of volunteerism represented in our 114 Clubs and Groups! To play with the numbers even further, each club conservatively has at least 50 members (many clubs have well over 100 members!), making the total Club and Group membership close to 6000 resident members. That's an awful lot of people enjoying the activities that our dedicated volunteers bring to the community.

As one of the Volunteer Task Force members stated in last month's column, Carolina Preserve has an "insatiable appetite" for activity, which helps make this a great place to live. The pure diversity in the clubs we have here is truly astounding. Our clubs range from Arts and Crafts, Sports and Wellness, Cards and Games, Community Service, Food and Beverage, Hobbies, Music and Dancing, and Socializing and Entertainment, with apologies for any genres I may have missed. When one stops to think about the amount of work it takes to organize a Golf or Pickleball Tournament, or to bring in a guest entertainer and supply food to over 150 residents, or to research the past month's hot news or sports topics and then facilitate a 90-minute discussion on said topics, it truly boggles the mind. We are so lucky to have resident volunteers who are willing to do this, week after week, year after year. Many of the leaders I spoke to said this was a labor of love, but that is still a lot of labor being performed.

Congratulations again to our Dedicated Volunteers – all **Club and Group Leaders**. We are sorry there isn't enough space in this column to print all your names, but that doesn't diminish how much we appreciate what you do for our community. The work our Club and Group Leaders do contributes immensely to making Carolina Preserve a great place to live, and brings much enjoyment, knowledge, exercise, and entertainment to many, many residents. Next time you attend a Club or Group event, please join us in thanking the leaders for their volunteerism!

# 2023 Committees

## Architectural Review Committee

Steve Botha | John Bongino | Elizabeth Diton | Bill Gurecki  
Claire Hammitt | Ken Merten  
Board Liaison: David Jackson | Staff Liaison: Patrick Dzimiri

## Club & Group Advisory Committee

Wanda Abel | Claudia Clissold | Joel Glassman | Cynthia Jackson  
Cara Lehman | Francine McElhinney | Marie Milazzo  
Paulette Shekell | Sandra Stein  
Board Liaison: David Jackson | Staff Liaison: Laurene Adkins

## Finance Committee

Dennis Curtin | Steve Harrison | Dennis Hefner | Rahul Parikh  
Paul Wolf | Ted Young  
Board Liaison: Jerry Warren | Staff Liaison: Chris Chaffin

## Information Technology Committee

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

**David Jackson**  
Vice President

**Sharon Valvona**  
Secretary

**Jerry Warren**  
Treasurer

**Jeff Diton**  
Assistant Secretary

**Ron Oliveri**  
Member at Large

## Mark Your Calendar

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**HOA BOD Open Working  
Meeting**

**December 19 | 11:00am  
Virtual / GoToWebinar**

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