



# February 2024 Issue LI Carolina Preserve HOA NEWS

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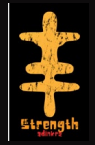
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## HOA President's Comments



*By Sharon Valvona*

I would like to take my own opportunity to wish you all a Happy New Year and a great 2024. Each new year presents its own challenges, but I am excited that we are off to a great start!

First, I would like to welcome our newest staff. They have all come to our community with enthusiasm and energy for their new opportunities. Paul Fogg is our new General Manager. There is an article in this month's newsletter that will help you to get to know Paul better. If you have been in Bradford Hall in the past couple of weeks you may have had the opportunity to meet him as he has been out and about introducing himself to residents. Josh Hughes is our new Facilities Manager. You will have the opportunity to get to know him better in a future newsletter article. He is more of a behind the scenes guy. And we are happy to have him here focused on keeping our facilities running and in good repair. Welcome also to Patrick Dzimiri. He has been with us since October. His Compliance Corner will continue to be a regular feature. He continues to refine the notification process. Many residents are grateful for the improved neighborhood appearance that has resulted from dedicated attention to our Compliance Policy.

I would like to express the Board's appreciation to all our back office and front desk staff who have been holding down the fort during the transition. We are grateful for your hard work during a challenging time. Your commitment has kept our community running. We also appreciate Chris Chaffin's coverage as we searched for new staff. Chris, whose home base is at Kuester Corporate in Charlotte, has been with us almost daily since November, first doing GM coverage and then training new personnel.

Welcome to the new Board members and new Advisory Committee members. Thank you to all the continuing Board members and Advisory Committee members. And thank you to all the club members who have stepped up to serve as officers of their clubs and keep them going. As has been said in this column many times before, volunteers keep this community running, keep our lifestyle vibrant and full of interesting activities, new ideas and great places to meet with old friends and make new ones.

To all the past and future volunteers, to all the residents who enjoy taking part in all that happens here, I would ask you to remember when you were in a new job or a new responsibility. As you will recall, with any new position comes a learning curve. Like you, people in these new positions will be doing their best to do a good job. Please be patient as we all come up to speed. And if you offer feedback, offer it constructively and courteously. It is so much easier to recognize useful information in that framework.

# CP News in Brief

January 2024

MONTHLY UPDATES Vol 3 Issue 1

## Bocce Courts Refurbished

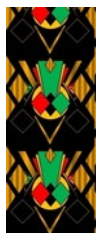
The project of renewing the CP Bocce courts has been completed. Work started in mid-November 2023. The old turf was removed. Additional sand added and the surface leveled. Finally new turf was added, and the surface rolled. Since the work occurred during a time of staff transition, the Bocce Club was asked periodically to check on and communicate progress to the Board. As the work progressed, the Club President also communicated with the acting GM. The Club was asked to play on the court as a final test of the work. The refurbishment was completed in early December and the updated courts are ready to play. Thanks to Al Lorie and the Bocce Club for their help with this project.

## Strategic Planning

It is that time again. Every two years the CP Board of Directors works with residents to update our neighborhood strategic plan. 2024 is one of our planning years. We expect to use a process similar to 2022. It will include several brainstorming sessions with residents, a meeting with staff and a meeting with local realtors to generate ideas and develop a strategy going forward on how to improve our neighborhood and maintain our excellent housing market resale values. As we have reduced our budget contribution to new capital projects and focused on maintaining our existing assets, the theme of the strategic planning will be how we make the most of what we have. Be on the lookout for more information about the brainstorming sessions in early Spring.

## Another Award for CP

Did you know, Carolina Preserve got another Diamond Award. CP tied with Lochmere for gold in the Best New Home Community in the "5 West" magazine. Carolina Preserve was the only 55+ community to receive any award. Kudos to all of us for making Carolina Preserve a great place to live!





## **Proposed Energy and Natural Resources Advisory Committee Feedback**

During the 2022 updating of the Carolina Preserve Strategic Plan, residents repeatedly voiced an interest in supporting “Go Green” initiatives in the neighborhood in general and in Bradford Hall in particular. In March of 2023, the Board of Directors approved the formation of a Go Green Task Force whose charge was to “seek ways in which we can identify more efficient energy solutions for Bradford Hall and the rest of Carolina Preserve, while keeping with short term and long-term financial restrictions”. Members were expected to help Carolina Preserve reduce “our carbon footprint through the application of renewable energy and other sustainable principles” and also consider our planting, spraying and fertilizing practices.

During the months of its work the Task Force focused on gathering information and completing analysis to make recommendations to help the HOA “become more environmentally friendly”. The Task Force completed its work in September 2023 and delivered a 68-page report of findings and recommendations to the Board. The report was made available to the community and the recommendations summarized for residents at the September Community Meeting. In November of 2023, as a follow up to the efforts of the Task Force, the formation of a new advisory committee named the Energy and Natural Resource Advisory Committee (ENRAC) was proposed to the Board. The proposed mission was to identify areas in which CP can promote wise energy use and resource management with specific attention to implementation of the recommendations of the Go Green Task Force. The Board asked the community for input regarding this new committee.

The Board received responses regarding the creation of the committee both in favor and against.

The in-favor reasons included:

- We all have a responsibility to reduce the carbon footprint.
- Good selling point for our community / increase property values / as a community of excellence, it is our responsibility to be a leader in this area.
- This is a critical area.
- TOC is encouraging residents to go green.
- This could lead to money savings for the community.
- Positive response to the work done by the Go Green Task Force – residents need to know if they volunteer to do work for the community, it does not go wasted.





The against reasons included:

- Enough rules already
- Inappropriate for a committee
- Additional costs
- Task force or sub-committee can do this
- Concern about not having enough volunteers for another committee

At the January 23 meeting, the Board stated its support for improving the community Go Green practices. It tabled the motion to approve ENRAC for further study of the most appropriate and cost-effective way to achieve this goal. Stay tuned for further details.



# 2023 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)				
	December YTD			Full Year Budget
	Actuals	Budget	B/(W) Budget	
Income	4,974	4,900	74	4,900
Uses:				
Reserves	(910)	(875)	(35)	(875)
Expenses	(4,038)	(4,046)	8	(4,046)
Net	26	(21)	47	(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	850	6	39	15	26	936
Interest	28	8	1	1	-	38
Expenses	(525)	(30)	(139)	(7)	-	(701)
12/31/2023	1,403	294	3	50	664	2,414

# Treasurer's Comments

By David Jackson, HOA Treasurer

December revenues were \$343K, \$27K over Budget due mainly to higher resales and interest income. Expenses were \$98K over Budget due to \$23K bad debt expense, \$27K storm water and retaining wall management, and \$10K higher utilities. This resulted in monthly net loss of \$66K. However, for the year 2023, we had a net profit of \$19K.

Resale fees were \$14K over Budget in December with nine home sales. Resale fees were \$25K over Budget for the year. In 2023, there were sixty-nine resales in CP.

The Replacement Reserve is now at \$1,402K, up \$93K from last month. Much of the reserve expenses forecast for 2023 (e.g. Marsalis project, locker room refurbish) will be delayed into 2024.

# 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)



# Compliance Corner

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

**2024 is HERE!!!!**

Hello!

I hope everyone's year has started off in a phenomenal way! I'm so excited to kick off 2024 as we explore the wonderful world of Compliance!!!!

In February our main areas of focus will be mailboxes, gutter cleaning and power/pressure washing, as we enforce all community standards. In the Spring we will specifically look at power washing of homes, particularly when it comes to the washing of home sidings.

Upholding community standards is important. So are community values, like consideration and compassion. If you have unique or unusual circumstances that make it difficult to meet the violation deadlines in time, please don't hesitate to email me at **[compliance@cpamberly.net](mailto:compliance@cpamberly.net)** and we can discuss. The goal of this compliance enforcement is not to punish anyone, but rather to make Carolina Preserve the most aesthetically pleasing community of the entire East Coast of the United States. (Experts often say start with small goals first, so here I am, starting with a small attainable goal:)

I hope you are all hard at work on those New Year's resolutions! Every time I go to my gym I see fewer and fewer people, so I guess some have decided to make 2025 their year, not this year. It's ok. 😊

Happy New Year!!

Your Friendly ARC & Compliance Coordinator,

*Patrick*



# Getting To Know Your Kuester Staff

*By Jeff Diton*



This space will continue to introduce our Kuester staff over the next several months. The board hopes this will be informative to our residents about our staff and who does what.

This month we are introducing Paul Fogg, the Carolina Preserve General Manager, who started with us on January 8<sup>th</sup> of this year.

Paul was born and raised in Ohio in Cincinnati, Cleveland, Toledo, and then Indianapolis. Paul's father was a Presbyterian Minister and the family relocated often for his work. Paul attended Montreat College right here in North Carolina and graduated with a degree in Business Administration. Paul has always been involved in running and operating Presbyterian Conference centers throughout the country. Most recently, he was Executive Director of the Ghost Ranch in Abiquiu New Mexico. Needless to say, the view out the window from Paul's office at the Ghost Ranch was quite different from his view outside his Bradford Hall office. In his various roles, he has been heavily involved in Project Management, Strategic Planning, Budgeting, and Customer / Community Service. Paul would summarize his career as "all about building communities".

Paul and his lovely wife Barrie of 37 years moved to Cary last year to be near their granddaughter (and of course her family). Paul has a daughter here in Durham and a son in Chicago. When Paul is not building communities, he enjoys his family, woodworking (in fact Paul just attended the grand opening of a new woodworking facility here in Cary) and the great outdoors. Paul and his family do a great deal of hiking, and sadly not as much camping as they used to do.





Paul was attracted to the Carolina Preserve position, initially for the location, but eventually for the community and the people he met. Paul visited our community this fall and had the chance to speak to several residents in and about Bradford Hall, and picked up a real friendly and open vibe here.

As the General Manager, Paul is responsible for the overall health and well being of our community, and to keep the two thousand plus residents safe and happy. Right now Paul indicated it's a lot of learning about systems and meeting with vendors and community leaders, but he looks forward to meeting as many residents as possible. Paul is a big proponent of Stephen Covey's 7 Habits of Highly Successful People, and is currently working on habit #5 – Seek First to Understand, Then to Be Understood. He is working very hard at understanding all that is going on with our community!

A typical day for Paul includes: (and he stressed it's way too early to know what a typical day is like)

- Walking the building and looking for issues
- Driving the community
- Staff meetings with the wonderful team he has here at Bradford Hall
- Overseeing projects and moving the existing projects forward
- Helping us build our Strategic Plan for 2024 and beyond

As you can see, Paul has many challenging responsibilities here at Carolina Preserve. We are very fortunate to have such a skilled professional in such an important role. So next time you visit Bradford Hall and see Paul, please say hello and welcome him to our wonderful community.

# 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 | Lynnette Womble  
Board Liaison: Stan Levine | Staff Liaison: Terrie Murray

# 2024 Board

**Sharon Valvona**  
President

**Ron Madl**  
Vice President

**Jeff Diton**  
Secretary

**David Jackson**  
Treasurer

**John Kasarda**  
Member at Large

**Stan Levine**  
Member at Large

**Ron Oliveri**  
Member at Large

# Mark Your Calendar

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**Open Board Working Meeting**

(Third Tuesdays)

**February 20 | 1:00 pm**

**Virtual**

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