



March 2024 Issue LII
Carolina Preserve
HOA NEWS

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HOA President's Comments

By Sharon Valvona

This month's issue reflects the outcome of the recent lively debate within the community and the Board itself about how best to act on the recommendations by our 2023 Go Green Task Force. To briefly repeat history reported in previous newsletter issues, during our 2022 strategic planning, residents voiced strong support for our community to find ways to "go green". Responding to that desire, the Board convened a Go Green Task Force last year. After intensive effort and thorough documentation of their conclusions, the Task Force presented 24 recommendations at the September Community Meeting, which were detailed in the full report submitted to the Board and available on the community website. Recognizing that a next step was needed to ensure further analysis where needed and that their recommendations would be acted upon, the Task Force proposed the creation of an Energy and Natural Resources Advisory Committee to pursue the recommendations as well as to monitor and promote future go-green practices and ideas.

The Board received a great deal of feedback both in support of the committee proposal and opposed. The Board had two spirited conversations about the proposal. The two articles detailing resolutions passed at the February 20 meeting show that the Board felt a different approach was appropriate. The resolutions show Board support for go-green, and the desire, where reasonable, to take action on the Task Force's recommendations.

Many questions the Board has received recently related to the recommendations and the proposed Committee reflect concerns about the possible cost of go-green. The original Go Green Task Force resolution stated it was to "seek ways in which we can identify alternate energy solutions for Bradford Hall and the rest of Carolina Preserve, while keeping with short term and long-term financial restrictions". I believe last year's recommendations show a real effort to think outside the box and to make challenging recommendations that are also consistent with the goal of saving money and do the analysis to show that is possible. But none of the "large ticket" proposals will move forward without further investigation and justification. That will be the challenge for our two new task forces.

CP News in Brief

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Party Closet

The Board has initiated discussions about Party Closet maintenance with the Club Advisory Committee and with Kuester Management. The Party Closet is located at the head of the Activity Rooms. It contains the supplies such as tablecloths and table markers that are used by Event Management staff, to set up for many club meetings and events. When supplies are not returned or returned in poor condition by those whose event used them, for example when tablecloths are returned soiled, it is difficult for the Event Management to service other clubs. The Club Advisory Committee has stepped up and volunteered to do inventory and improved labeling in the Closet as well as posting pictures as to the proper care of tablecloths. The Board has asked Kuester Management to consider how to improve inventory and replacement of worn out or broken items. No improved process will succeed unless clubs also do their part to ensure that all borrowed set-up supplies are returned clean and in good condition or any breakage is reported to Lifestyle.

Strategic Planning

As mentioned last month, 2024 is a Strategic Planning year. Be looking for an email blast in the next two weeks with an opportunity to register for one of our Strategic Planning focus group meetings. We will be holding a morning, afternoon and evening session on different days to increase resident accessibility to session times. Realtors who have listed and/or sold in our neighborhood will be invited to share their perspective on how to maintain our excellent housing market resale values. There will also be a focus group for staff to share their unique perspective. A key theme of these focus groups will be how do we make the most of the assets we have.



CP Residents Having Problems Calling 311

It has been reported that some residents may have a problem calling Cary 311 non-emergency service telephone line for the purpose of non-emergency service offered by the Town of Cary.

All residents should check all of their phone lines to see if they can complete 311 non-emergency service calls. If not, then please email the following information to 311@CaryNC.gov for further assistance:

- Type of service (cellular, cable/landline, VOIP, fiber)
- Carrier name (Verizon, AT&T, etc.)
- Phone number calling from
- Date and time attempted called
- Location (where they were when they called)
- Message they received (unable to complete call, fast busy, etc.)

I Want to Know . . .

Frequently Asked Questions

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

Please discuss the \$60K overrun of the Pavillion Project.

As reported in the minutes of the October 17, 2023 Board Open Working Meeting, the then Treasurer Jerry Warren provided a precise update on the project's financials. The project was \$41K over budget, in which Mr. Warren explained \$5K came from unexpectedly hitting bedrock during the construction, and \$19K came from an added requirement of the Town of Cary to install a sidewalk to the pavilion. This leaves an unexpected \$17K overrun for the electrical work, which the board is still investigating and a \$2.6K general contractor expense explained at the February 20 Board Open Working Meeting. As discussed in the last several meetings, our highest priority now is to get the remaining inspections completed and the pavilion open.

Was the suggestion of a Facilities Committee considered during the ENRAC discussion?

A proposal for the creation of a Facilities Committee was considered. It was decided that much of the impetus for the proposal was a response to past experience and previous staff. New, enthusiastic management staff are working hard to get up to speed and address past issues. At Kuester's request, we are using their Basecamp project management tool to improve project communication. The Board is also considering other proposals related to project management and RFP (Request For Proposal) processes. Two new Task Forces related to Energy Efficiency and Landscaping Transition are being formed. The Board decided to concentrate on leveraging these new opportunities.

How does our reserve fund balance compare to end of last year and what is a healthy reserve fund goal?

The Contingency Reserve should approximate 15% of homeowner revenue (per the Carolina Preserve HOA Financial Policy, version 12-20-2022). The contingency reserve fund balance at the end of 2022 was \$638K, or 18.7%; at the end of 2023, it was \$664K, or 16.2%.

Low-Hanging Fruit

In November of 2023, as a follow up to the efforts of the Go Green 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 GGTF. The Board asked the community for input regarding this new committee.

At the January 23 meeting, the Board stated its support for improving the community go- green practices, however it tabled the motion to approve ENRAC for further study of the most appropriate and cost-effective way to achieve this goal. In early February, the Directors held a follow-up meeting. Different recommendations of how to approach the goal were presented. In keeping with their support for improving the community go-green practices, the Directors decided that some of the GGTF recommendations could be implemented within existing organizational structures, by Kuester staff, by existing committees or by existing clubs. Further, most could be implemented inexpensively with a minimum of effort and, in some cases, would result in cost savings. Listed below are these “low hanging fruit” recommendations and the organization that has been or will be asked to assume responsibility.

Assigned to Kuester Management

- Conduct an energy audit of Bradford Hall according to the Level 2 standard of the American Society of Heating, Refrigerating, and Air Conditioning Engineers (ASHRAE).
- Install a simple sign in each shower that says “Save Water: Limit Your Shower Time”.
- Install timer on/off faucets for showers.
- Require LED or solar lights in Bradford Hall and all HOA property when installing new lighting or replacing existing lights.
- Encourage and support efforts of the Lifestyle Department for recycling events, including electronics, battery collection and out-of-date pharmaceuticals.
- Encourage and support the Lifestyle Department in working with all vendors and food trucks that visit CP to provide biodegradable take away containers.
- Assess and, where necessary, repair irrigation in common areas and villas
- Encourage the Lifestyle Department to recruit “green” vendors in CP’s annual vendor fair.
- Investigate expansion of Bradford Hall recycling services to include glass, plastic, aluminum, and paper in addition to cardboard which is currently collected and recycled.

Assigned to ARC Committee for Review and Recommendation

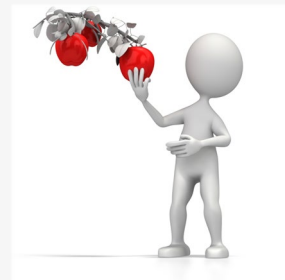
- Change ARC Design Guidelines for fast-track non-grass solutions to shady areas in the front and back yards.
- Change ARC Design Guidelines to permit locating solar panels according to the contractor's recommendation to achieve the homeowner's energy goal.
- Change ARC Design Guidelines to permit outdoor composting.

Assigned to Environmental Club

- Create a document for the CP website that provides useful information for residents.

Assigned to Board

- Based on recycling expansion investigation results, consider modifying the Facilities Use Policy (5.8 Kitchens page 13 – Recycling) to require groups' recycling after events in Bradford Hall.





Two Task Forces

In early February the HOA Board of Directors convened to further consider the proposed Energy and Natural Resource Advisory Committee (ENRAC) whose purpose was to implement the recommendations of the Go Green Task Force (GGTF). As discussed in the preceding article, the Board felt that many GGTF recommendations could be acted upon by Kuester Management or by existing committees and clubs. There were a few “big ticket” recommendations that the Board felt, consistent with resident questions and the report by the GGTF itself, will require further investigation, including a cost-benefit analysis. At the February 20, Board Open Working Meeting, the Board approved dividing the remaining complex recommendations between two new task forces, an Energy Efficiency Task Force (EETF) and a Landscaping Transition Task Force (LTF).

Resolutions for these two Task Forces have been drafted and are under review by the Board. What follows are the descriptions from each resolution. These statements explain the focus of each Task Force and which GGTF recommendations will be addressed by each. Deliverables from each committee will be implementation alternatives and recommendations including the aforementioned cost analysis. The Board will review these deliverables and then decide if each recommendation is to be implemented completely, in part, or not at all.

An Energy Efficiency Task Force (EETF) is to be implemented to seek ways in which we can identify and implement energy solutions for Bradford Hall and other CP common facilities that will reduce CP energy usage and cost, lower maintenance effort/cost, and/or improve resident experience. The EETF will initially start with the Go Green Task Force (GGTF) Final Report recommendations titled.

1. In conjunction with Kuester staff, conduct an energy audit of Bradford Hall according to the Level 2 standard of the American Society of Heating, Refrigerating, and Air Conditioning Engineers (ASHRAE).
2. Review HVAC equipment modifications for short term and long-term savings and
3. Assess installation of a solar energy system to provide energy to Bradford Hall.

The EETF will perform any analyses (including a Cost Benefit analysis) that will provide a rationale for their recommendations to the CP Board.

A Landscaping Transition Task Force is to be implemented to seek ways in which we can transition away from polluting 2-cycle landscaping equipment to quieter

alternatives and to convert common area plantings to perennial native plants that are more deer resistant, drought tolerant, and climate adapted while keeping within current landscaping budgets. Suggestions must be consistent with ARC Design Guidelines. CP should have interest in growing non-invasive species of plants which attract pollinating birds and insects and that require less maintenance and irrigation. Considerations should include minimizing the use of harmful pesticides and excess fertilizers.

The mission of the Task Force is to constructively consult with knowledgeable landscaping firms to assess several areas in which we may be able to improve our current landscaping practices. The primary areas of focus include the following:

1. Consider options to the noise and pollution of equipment powered by two-cycle gasoline engines (blowers, line trimmers and edgers).
2. Explore potential for creation of a partnership between CP and the contracted landscapers and potentially the Town of Cary.
3. Consider organic alternatives and/or application frequency for the use of chemical fertilizers, herbicides and pesticides.
4. Expand planting of common areas with Keystone perennial native plants only. Require new and replacement plantings only in fall/early spring, as appropriate for the plants.
5. Develop plans to replace dead and/or missing trees and bushes in CP common areas with emphasis on use of native NC plants and trees.
6. Provide sufficient water and/or irrigation to encourage root growth during the fall/spring which increases the probability of survival.
7. Require landscaping contracts to include a provision that all plantings be guaranteed for at least for one year.

Consult an arborist, or equivalently trained individuals, to provide instruction on proper pruning techniques, including removal of dead branches, elimination of unwanted saplings and to make recommendations on plant replacements.



2024 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)				
	January YTD			Full Year
	Actuals	Budget	B/(W) Budget	Budget
Income	431	426	5	5,138
Uses:				
Reserves	(93)	(93)	-	(925)
Expenses	(348)	(333)	(15)	(4,209)
Net	(10)	(0)	(10)	3

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
12/31/2023	1,403	294	3	51	664	2,414
Contributions	90	-	1	2	(10)	82
Interest	4	1	0	0	-	5
Expenses	(23)	-	-	-	-	(23)
1/31/2024	1,474	295	4	52	654	2,478

Treasurer's Comments

By David Jackson, HOA Treasurer

Revenues started the year off well. January net revenues were \$338K which is \$5K over budget. This includes higher than expected interest income from Certificates of Deposit (CDs) and we are still getting decent resale fees. However, expenses were \$15K over budget. Accounts with unusual cost overages were IT (\$3K), pool maintenance (\$6K), and clubhouse maintenance (\$6K). It is believed that these were unusual, one-time expenses which the Finance Committee will be reviewing. Currently, no re-forecast for the year seems warranted.

Regarding CD income, we now have 28 Certificates of Deposit. Given the current interest rates, efforts are made to maximize our interest income. One \$50K CD matured in February; we rolled that amount plus interest (\$58K) into a new one-year CD at 5.1%. We do business with five different banks with various CDs, Money Market accounts, and checking accounts.

In January, there were four recorded resales of houses in CP providing over \$8K in revenue. For reference, in 2023 there were sixty-nine resales for the year.

The Capital Reserve is now at \$1,824K, up \$75K from last month. The Contingency Reserve is now \$654K.

The attached Financials are compiled from the reports provided by Kuester.

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

Compliance Corner

By Patrick Dzimiri, Compliance
compliance@cpamberly.net

Greetings!

March is upon us. Spring is finally here. I'm sure that everyone is sad that winter is on its way out for the year, but the good news is this: those terrible weather conditions will be back in 10 months for everyone's enjoyment!

As I mentioned last month, upholding community standards is important and 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 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)

So where is the focus in March? As you probably guessed, definitely pressure washing the house siding IF your house siding is green. Some homeowners have opted to do it now and some, closer to summertime. If I issue a violation for pressure washing and you need time, please do not hesitate to contact me and we can discuss a resolution. Bird feeders in street trees and excessive yard decorations will also be a particular focus.

From a compliance perspective *please remember that any political signs can be hung up no earlier than 30 days before an election and 15 days after the elections.* For those who are not aware the North Carolina primary election is on March 5, 2024. With this in mind, please take down any political signs by March 20, 2024. Surprisingly, I've seen very few political signs in the community this year, and so this doesn't apply to many people. I'll address this issue as it pertains to the North Carolina and U.S. presidential election on November 5, 2024, in October.

HOA Architectural Compliance Manager,
Patrick

Getting To Know Your Kuester Staff

By Jeff Diton

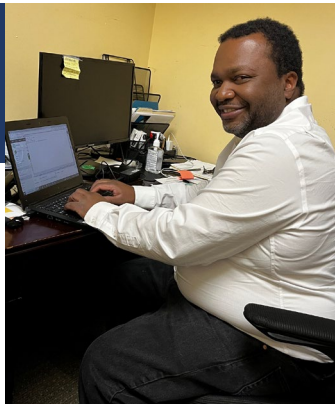
In this month's edition of *Getting To Know Your Kuester Staff*, we are introducing Patrick Dzimiri, the Carolina Preserve ARC and Compliance Coordinator, who started with us on October 23rd of last year.

Patrick was born in Germany and raised in Zimbabwe, Saudi Arabia, and Ellicott City, Maryland. His family is originally from Zimbabwe, and his parents met while attending university in Germany. Patrick attended elementary schools in all four countries before enrolling at the University of Maryland – Baltimore County, where he received a Bachelor's degree in Political Science. In 2022, Patrick received a Master's degree in Homeland Security from the American Military University. Patrick's thesis focused on preventing human trafficking in the United States, a subject he is very passionate about.

Patrick was a contractor for the Defense Health Agency in Washington DC for about 2 years where he specialized in IT systems. Patrick started his own Math tutoring business in Virginia for a couple of years, and when his mother and older brother moved to North Carolina, he followed them here in 2019. Patrick initially worked for Aetna doing compliance work for their Medicare patients, ensuring they received their entitled benefits, and conducting investigations into elder abuse cases. During the pandemic, Patrick joined Merck in Durham as a Covid Compliance Officer. After Covid, Patrick joined Fluent Solar as a Project Manager responsible for successful compliance with solar installations. Patrick worked briefly in customer service for a hotel chain, and when our compliance position opened up late last year, Patrick jumped at the opportunity to get back into compliance.

On a personal note, Patrick is engaged to be married to someone he's known since his days in Zimbabwe schooling. They have been friends for 25 years, and they finally realized there was something more than a friendship there. In his spare time, Patrick enjoys teaching math, and boxing. Patrick had a hard time finding a gym in the area, so he built himself a little home gym for sparring.

As the ARC and Compliance Coordinator, Patrick is responsible for ensuring the Carolina Preserve architectural standards are met by the 1360 homes in our community, and



working with ARC to process modification requests and fast tracks. Patrick is also seen as the functional expert on our architectural standards, and answers any general questions about the guidelines and customer service in general.

A typical day for Patrick includes:

- Addressing violation disputes
- Following up on any customer inquiries
- Driving around the community ensuring properties are in compliance
- Following up on any ARC requests or inquiries
- Assisting teammates with other responsibilities as requested
- Working together with the great Kuester team to deliver the best possible service for our residents

Patrick said the biggest surprise in the first few months of working here is how personal residents take violations. From Patrick's point of view, he is simply pointing out a deviation from the ARC guidelines. At times, he was surprised by the emotional response to violation letters. Patrick reiterated that he has an open-door policy and is always happy to have a conversation or answer any questions that a resident may have. As Patrick is often out and about the community, email is the best way to reach him. He is happy that people have taken his notices seriously, and he believes the community is looking great as a result. He appreciates residents working with him to accomplish the shared goal of a great looking community. In addition, Patrick points out that the majority of his compliance experience is in the institutional field, and he really appreciates the community experience that our new General Manager Paul Fogg provides him. Patrick also pointed out he enjoys working with the extremely knowledgeable and dedicated members of ARC and he has learned much from them regarding the detail that goes into the modification request process.

As you can see, Patrick has many challenging responsibilities here at Carolina Preserve. We are fortunate to have such a dedicated professional in such an important role. Next time you visit Bradford Hall and see Patrick, 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 Ditton
Secretary

David Jackson
Treasurer

John Kasarda
Member at Large

Stan Levine
Member at Large

Ron Oliveri
Member at Large

Mark Your Calendar

Open Board Working Meeting

(Third Tuesdays)

March 19 | 1:00 pm
In person & virtual

April 16 | 1:00 pm
In person & virtual

May 21 | 1:00 pm
In person & virtual
