



April 2024 Issue LIII  
**Carolina Preserve**  
**HOA NEWS**

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*A total solar eclipse is about as bright as a full Moon — and just as safe to look at. But the Sun at any other time is dangerously bright. View it only through special-purpose solar filters that comply with the transmittance requirements of the ISO 12312-2 international standard for filters for direct solar viewing.*

**April 8, 2024  
Total Solar Eclipse**



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## HOA President's Comments

*By Sharon Valvona*

Strategic Planning is such an important process for our community. On one hand strategic planning presents an opportunity for residents to think outside the box, and on the other hand their ideas proceed into a structured process that evaluates them and takes many forward to become part of the roadmap for our future work and future expenditures. It is an opportunity for residents to interact directly with one another about our future goals and for the Board to hear and participate in the discussion. Maintaining our home and neighborhood value and appeal to future buyers is always important to residents. By including a realtor focus group in the process, residents, particularly the Board, are able to hear about what we are doing right, but also why buyers may not choose houses in our community and incorporate that feedback into future planning.

Participation in CP Strategic Planning is open to all residents on a first-come, first-served basis. Registration links are provided in the following article and can also be accessed on the website under Governance>HOA BOD Communications. We have tried to vary the meeting days and times to minimize conflicts.

I encourage you to register for one of the focus groups if there are still seats available. Even if you are not able to participate in a focus group, please take the time to read the articles about what guides our planning and the planning process itself. Rereading our Mission, Vision and Core values is a refreshing reminder of the community we should all aspire to be. "Strategic Planning 2024" explains what residents should expect this year and how they can stay informed culminating in a summary of the updated plan at the November Annual Meeting.



## What Guides Our Strategic Planning

The Strategic Planning process is an important opportunity to remind ourselves of what guides us as a community.

First our mission statement:

**Mission:** Carolina Preserve nurtures abundant experiences to enrich residents' quality of life while enhancing the value of the community.

Second, our vision of who we want to be as a community:

**Vision:** Carolina Preserve will be a premier active adult community with a reputation for excellence

Finally, adherence to our **Core Value System** is the underpinning of the Strategic Plan.

Active and Engaged Lifestyle - As a community of persons 55+ years young, we are actively engaged in community fun, volunteerism and the joy of community living. We actively pursue our common passions and interests, encouraging our neighbors to pursue theirs as well. We have fun together.

Financial Strength - Our community values its financial strength. Each volunteer, staff member and contractor is expected to be a responsible steward of the community's financial resources by constantly seeking better, more efficient and cost effective ways to conduct community business, so property values are enhanced. Long-term processes will be managed in a manner that provides financial viability.

Accountability - Each community resident is accountable to the other residents. In addition, the Board, staff, contractors, and volunteers are responsible to the Community's residents for their actions and are guided by standards of honesty, objectivity and integrity. They consistently conduct business in the best interests of the community as a whole.

Mutual Respect - Standards of honesty, fairness and openness are important to each resident. We are good neighbors to each other, treating each other as we want to be treated. We respect the dignity of each individual, whether resident, guest, community volunteer, contractor or staff member. We expect the same dignity in return.

Transparency in Governance - The community's Board of Directors is forward-thinking and strategic, operating with openness. It is responsive to members' preferences, acting in the best interests of the entire community. It operates with a duty of care, a duty of reasonable business judgment and a duty of loyalty.

Excellence - The community provides its residents and guests with high quality services, programs, and facilities. Volunteers, staff, and contractors strive as one team for continuous and never-ending improvement in all facets of their work. They interact with residents using best practices for courtesy and service.

Guardianship - Consistent with its legacy to provide an attractive community, the community will protect and enhance the beauty of the natural environment and attractive landscaped setting of the community. This stewardship enriches residents' quality of life.

We will be building on this in the upcoming weeks with the help of residents, realtors, and Kuester staff focus groups. As you will see repeated throughout this newsletter, we encourage you to participate.



## Strategic Planning 2024

The CP Strategic Plan is a road map that charts what the CP Board, working with Kuester staff, Board Committees, Task Forces and other residents, will be striving to accomplish in the next three years. Though updated annually, in 2017 the Board adopted the approach of a bi-annual, community-driven Strategic Plan review and revision.

The first step in 2024 will be focus groups: three resident sessions, one realtor and one staff. Participation in the resident sessions is open to all residents on a first-registered, first-served basis. An invitation eblast was sent out on March 25 with a registration link for each meeting. This year's resident sessions will take place on April 2 from 6:30pm – 8:30pm, April 10 from 2pm – 4pm, and April 15 from 10am – 12pm. The registration links are also provided below.

When they first enter their focus-group meeting, residents will choose a table. Other attendees at the table will be their working group for the remainder of the session. In preparation for the brainstorming main event, residents will review the status of the current Strategic Plan, be reminded of the community mission, vision, and values, and discuss the “dos” and “don'ts” of brainstorming. During the primary exercise, new ideas will be generated by each working group and prioritized. The final step will be to consolidate ideas across all the teams.

The work by all the focus groups should be completed by mid-April. From the end of April through May, the results from all five sessions will be compiled, consolidated, prioritized, and incorporated into the first draft of the updated Strategic Plan. This draft plan will be available for community review and feedback. The Board will finalize the updated Strategic Plan during June to be ready to provide direction for the 2025 Budgeting process.

Now a dash of reality: though this process is intended to encourage participants to think outside the box, it will also provide some guidelines to help them make the most of their work in the context of our community. In addition to mission, vision, and values, participants will be reminded that the CP Strategic Plan is organized around five primary objectives: superior governance, financial strength, improved activities and programs, enhanced infrastructure, and excellent operations. Some final ideas teams will be asked to keep in mind while they complete their assignment:

- Make the most of what we have – supporting aging amenities is a major focus of our reserves and budget
- Attract great people to our community
- Increase housing values
- Not every idea will make it into the final plan!

April 2, 2024 (Tuesday) at 6:30pm – 8:30pm

[Click Here to Register for April 2nd Focus Group](#)

April 10, 2024 (Wednesday) at 2pm – 4pm

[Click Here to Register for April 10th Focus Group](#)

April 15, 2024 (Monday) at 10am – 12pm

[Click Here to Register for April 15th Focus Group](#)



## **Marsalis Way Retaining Wall - Solution in Progress**

The retaining wall over the streambed located on Marsalis Way between Leister Court and Gillander Place (just off Del Web Avenue) was damaged and partially collapsed in early January 2022, as a result of a series of severe storms. The storms caused a large amount of water to accumulate and consequently soaked the earth behind the retaining wall overwhelming the ability of the structure to pass the water through the culvert, and as a result, portions of it collapsed. This collapse left the earth on the upstream side of the road exposed to erosion, which resulted in the possibility of damage to the roadway itself. So, addressing the problem was and is a high priority task.

The area was stabilized immediately by Stormworx so no further erosion could occur while a long- term solution was investigated. Stormworx also performed and continues to perform regular checks of the area and completed further stabilization on the downstream side of the culvert.

The first step in the process of remediation was to determine the ownership of the retaining wall itself, in order to identify the party responsible for its repair. Through protracted discussions with our insurance company and the Town of Cary, it was determined that our association is responsible for the repair.

The HOA then began the process of understanding why the wall failed, to identify a permanent resolution that would not allow the wall to fail again and to continue to secure the area against further damage. An engineering firm was engaged to evaluate the issue and make suggestions as to both a short-term safety action to prevent further damage, and ideas to pursue a long-term permanent fix. It also enabled the HOA Board and our management company to investigate possible funding for all actions necessary, both short term and long term. Many options were considered and pursued – insurance, grants, governmental assistance among others.

Ultimately, those options were unsuccessful and the engineering firm was directed to draft plans to address a long-term solution. The initial engineering firm withdrew from the project in February 2023 and a second engineering firm was engaged on the same terms and costs almost immediately. In the late summer/early fall of 2023, plans for a slope configuration with extension of the storm drain as opposed to replacing the retaining wall, were submitted to the Town of Cary for approval. In.

October 2023 the Town of Cary returned the plans with requested adjustments. Revised plans addressing the Town of Cary's adjustments were resubmitted for approval in late 2023/early 2024.

Our new Kuester General Manager, Paul Fogg and new Facilities Manager, Josh Hughes, started work in early January 2024. They both hit the ground running and have focused on learning the detail of the issues to be addressed and the plan put into place. Paul will be reporting regularly as the project progresses.

Regarding next steps, we have just received (3/19/2024) approval from Federal, State, and Local governing bodies for a more robust and significantly less risky long-term solution to using a retaining wall. The existing retaining wall on the upstream side (north) will be removed in its entirety, and replaced with a sloped bank that extends further upstream from the roadway. The culvert itself will have the damaged lead-in section that failed completely removed, and joined to a larger culvert that brings the stream entry upstream about 80 feet. This approach removes much engineering effort and reduces the risks inherent with a retaining wall. As of now, we are reaching out to multiple contractors with a new project management approach approved by this year's Board, with an enhanced RFP (request for proposal) process also put into place by the new Board. The use of the Basecamp application allows quick evaluation, and the ability to respond to ideas, suggestions, and options in a timely manner.

The current estimate is to have a fully qualified and vetted contractor selected within 45-60 days, a firm budget that anticipates reasonable issues in advance. The planned approach will not require the closing of Marsalis and we anticipate a project duration after the start in roughly 12-14 weeks. The result will be a simpler, less risky long-term solution, that will also require less maintenance. The downstream side of the roadway retaining wall is not at risk of collapse, so no work is needed there. With the addition of new Management Staff, the enhanced interactions between the Board and the Management company, and the Board's improved approach to project management including Basecamp, we should be able to provide status reports to the community on a regular basis.



## Progress on Low Hanging Fruit Proposals

The Go-Green Task Force completed its assignment with submission of its final report last September. The 2023 HOA postponed action on its proposals until the next HOA began its term. The proposals that could be accomplished by staff after HOA approval were identified as “Low Hanging Fruit”. Those proposals were approved to move forward and are currently being prioritized and implemented by staff. The remaining proposals were separated into two task forces, one focused on energy efficiency in Bradford Hall and the second focused on a variety of landscaping topics. **Those task forces were approved to move forward to conduct additional evaluation on the ideas** and bring recommendations back to the board for any final decisions. No approvals were made to proceed with implementation until analysis is completed and the board makes a final decision. Requests have been issued for volunteers to serve on both task forces. They will both begin their investigative work sometime in April.

We feel that it’s important to keep the CP community updated on progress of these proposals. Each month we’ll report on progress being made for several topic areas. This will enable residents to become aware of the progress and to take advantage of any benefits this may offer to them. This month focuses on Low Hanging Fruit proposals.

**Limit Shower Time.** This may seem trivial, but occasionally last year when GGTF was evaluating efficiency opportunities, there were several occasions when the showers were left on with no one in the shower area. The result was noticeable in the water and energy bills. The plan is to place signs to remind users of the showers to limit their shower time and conserve water. *This is in progress by staff.*

In addition, the separate project for updating the shower areas will include timers on each shower head. *This is in the plan by staff.*

**Install and adjust motion sensors and timers in Bradford Hall rooms.** All rooms in Bradford Hall are to be equipped with motion sensors to turn off lights after a defined amount of inactivity in the room. The sensitivity of some of the sensors currently installed needs to be adjusted. *This is in process by staff.*

**Use only LED or solar lights for new or replacement light fixtures in CP.** While most lights in Bradford Hall are LED, there are some which need replacement. Any future additions need to be the same. *This is in process by staff.*

**Inform food trucks and food vendors of CP preference for BPI compostable take away food containers.** CP needs to let our food trucks and vendors know that CP residents prefer to receive their food served BPI compostable containers instead of Styrofoam or plastic. There are several reliable suppliers of BPI compostable containers. The food truck needs to indicate when they do offer their products in compostable containers so we make the appropriate effort to dispose of them when finished. This should broaden the pool of CP residents who make the effort to compost their containers. The vendors will also benefit by making their other customers beyond CP aware of this benefit. No vendor is required to do this. No resident is required to compost the containers. *This communication with food trucks and outside vendors is in the planning stage by staff.*

**Equip Bradford Hall and CP facilities for collection of trash, recyclables and compostables for CP events.** Currently, Bradford Hall only disposes of trash after CP events. All residue is trash. Cardboard is the only item that is recycled in Bradford Hall. Providing waste containers labeled for trash, recyclables, and compostable, will allow clubs to better manage the residue after their events. The club organizer is responsible for removing the recyclables and compostables at the end of the event. Some clubs are currently doing this now but need more appropriately sized waste containers and labels. No club is required to do this. Compostable plates, cups and utensils are available from the Environmental Club at cost. *Staff is acquiring appropriate size waste containers and labels for future use.*





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



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

### **How do I register for one of the Strategic Planning Focus Groups? Do I have to be a member of the Focus Group to join?**

No, you do not need to be a member of any group to participate in one of the Strategic Planning Focus Groups. We are asking that residents register for one of the available sessions by clicking on the appropriate link provided in the announcement. After you have registered, you will receive confirmation of your participation in that event. Please note that space is limited, so register as soon as possible.

### **Can you add me to the HOA Board's email distribution list?**

The Board does not maintain any distribution lists for our emails. Emails are sent via Club Express, the Carolina Preserve website, and are completely controlled by your profile settings in Club Express. If you go to your profile (click on your name in the upper right corner of Club Express) and select privacy settings, ensure the first box that says "Yes I want to receive these emails" is selected. If it is selected and you are still not receiving emails from Club Express, please reach out to the IT Committee at [IT.Committee@cpamberly.net](mailto:IT.Committee@cpamberly.net) for help.

### **When will the Spring Community Meeting take place?**

At this time, we plan to conduct a Community Meeting on June 17, 2024, from 6:30 PM to 8:00 PM, in Bradford Hall. The meeting is a bit later than last year as we have Strategic Planning sessions also occurring in the spring. As we get closer to that time, we will make a public announcement with more information.

### **Have the new task forces already started (Energy Efficiency and Landscaping Transition)?**

No, neither of these task forces have started yet. The call for volunteers along with the detailed charters was sent out on March 25th. If you are interested in either task force, please express your interest by completing a form in the volunteer database (link provided below). If the link does not work for you, you can also send an email to our General Manager Paul Fogg at [gm@cpamberly.net](mailto:gm@cpamberly.net) expressing your interest. Both task forces will start up in early April, so please don't delay in signing up. Depending on interest and relevant skillset, not all volunteers may be chosen, but your interest and skillset will be noted for potential future volunteer opportunities.

**[CP Needs You - Carolina Preserve at Amberly \(cpamberly.net\)](https://www.cpamberly.net)**

# 2024 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)				
	February YTD			Full Year
	Actuals	Budget	Difference	Budget
Income	426	426	-	5,138
Uses:				
Reserves	(68)	(68)	-	(925)
Expenses	(356)	(358)	2	(4,209)
Net	2	(0)	2	3

RESERVES + EQUITY (\$000'S)						
					Oper Resv	Tot Reserves
	Replacem ent	Villa	IIF	Painting	(Equity)	+Equity
1/31/2024	1,474	295	4	52	654	2,478
Contributions	65	-	1	2	2	70
Interest	4	1	0	0	-	5
Expenses	(74)	-	-	-	-	(74)
2/29/2024	1,469	295	5	54	656	2,478

# Treasurer's Comments

By David Jackson, HOA Treasurer

Revenues are still doing well. February net income was \$358K which is in line with the budget. We are still getting higher than expected interest income from Certificates of Deposit (CDs). However, resale fees were down; there were only two recorded sales during the month. Overall, expenses were in line with the budget. Accounts with unusual cost overages were fire suppression (\$4K), HVAC maintenance (\$5K), tennis court maintenance (\$5K), and clubhouse maintenance and hardware (\$7K). Some of these may be unusual, one-time expenses which the Finance Committee will be reviewing. At this point, no re-forecast for the year is warranted.

One \$50K CD matured in February; we rolled that amount plus interest (\$58K) into a new one-year CD at 5.1%. In February, there were two recorded resales of houses in CP providing over \$4K in revenue.

The Capital Reserve is now at \$1,824K, basically even with last month. The PoolPak was replaced at a cost of \$74K. The Contingency Reserve is now \$656K.

The attached Financials are compiled from 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 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*

Hello!

I hope that March was a productive and enjoyable month for everyone! Spring is finally around the corner and there is a lot to look forward to in terms of activities, festivals, and overall improved weather!

In April our main area of focus will be power/pressure washing, as we continue to uphold all community standards. Many residents have taken the initiative to start pressure washing their home, so thank you for being proactive! The house sidings will be a particular focus, particularly for those sidings that currently have a green color. I'm very pleased to have heard from several residents who own power washing equipment who have gone ahead and powerwashed some of their neighbors' homes, providing great assistance to not only their neighbors, but the community at large.

Another area of focus this month will be street trees. Here are a few tips about street trees:

1. This is the ideal time of the year to plant street trees. Please make sure that:
  - a. The street tree has a minimum trunk diameter/caliper of two inches (2") in diameter.
  - b. Caliper measurements of the trunk of the tree are to be taken 6" above the ground.
  - c. All replacement street trees must be a minimum of eight feet (8') high.
  - d. The street tree must be planted in the same spot as the original tree, or it can be moved laterally a few feet if needed to avoid utilities, but it must remain in line with the other street trees on the block.
2. The ARC guidelines are available on the Community website and provide a wealth of information. You may also [click here](#) to view the ARC guidelines.

Wishing you all a wonderful April!

Your Friendly HOA Compliance Manager,  
*Patrick*

## Getting To Know Your Kuester Staff

In this month's edition of Getting To Know Your Kuester Staff, we are introducing Josh Hughes, the Carolina Preserve Facilities and Operations Manager, who started with us on January 8th of this year.

Josh was born and raised in Independence, Kentucky. He attended Northern Kentucky University for two years and finished his Associates Degree at Gateway Community and Technical College. Josh is just about finishing up his Bachelor's degree in Industrial Engineering Technology at East Carolina University.

Josh was in the Coast Guard for 10 years. He moved from Kentucky with his wife, a native North Carolinian to Carolina Beach where he was first introduced to the Coast Guard via a neighbor. While with the Coast Guard, Josh was responsible for Cargo and Container ship inspections, hazardous material inspections, and supervised the movement of explosives



on and off ships. After the Coast Guard, Josh took a less dangerous position with a Property Management firm for rental properties. After that, Josh advanced into the Facilities Management field, managing several Truist office buildings. That was a contract position, and when his contract expired, Josh was the successful candidate for our Facilities position.

On a personal note, Josh is quite busy between his school work and new position, but someday he hopes to get back to playing basketball, a sport he loves.

As the Facilities and Operations Manager, Josh is responsible for the maintenance and repair of all Carolina Preserve amenities.





A typical day for Josh includes:

- Making his daily rounds of Bradford Hall
- Driving around the community several times a week checking the pocket parks and common areas
- Making note of any areas of concerns he sees, and then developing a plan for their repair, either via himself or through one of our vendors.
- Developing a preventative maintenance schedule (Josh stressed its better to be preventative than to be reactive)
- Growing his vendor relationship responsibilities

Josh says his biggest surprise is how active our community is. He is pleased to meet many residents on a daily basis and is impressed with how involved, pleasant, and upbeat they seem to be.

As you can see, Josh has many challenging responsibilities here at Carolina Preserve, with our amenities at the point where many of them need “refreshing”. We are fortunate to have such a dedicated professional in such an important role. Next time you visit Bradford Hall and see Josh, 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

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## Open Board Working Meeting

(Third Tuesdays)

**April 16 | 1:00 pm**

**In person & virtual**

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**May 21 | 1:00 pm**

**In person & virtual**

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## HOA Board Community Meeting

**June 17 | 6:30pm**

**In person & virtual**

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