



June 2024 Issue LV
Carolina Preserve
HOA NEWS

**INSIDE THIS MONTH'S
ISSUE:**

- CP Community Meeting Reminder 1**
- HOA President's Comments 2**
- Carolina Preserve Strategic Planning 3**
- Coming Soon: Election Task Force 4**
- Financials At A Glance 6**
- Treasurer's Comments 7**
- ARC Submissions 8**
- Compliance Corner 9**
- Getting To Know Your Kuester Staff 10**
- Committees 12**
- Board Members 13**
- Mark Your Calendar 13**



June 17, 2024 6:30pm-8:00pm



COME. SHARE. LISTEN. THINK.
COMMUNITY MEETING



HOA President's Comments

By Sharon Valvona

Thank you once again to all who contributed their ideas and feedback to the Strategic Planning Focus Groups. And a special thank you to Jeff Diton, our Board Secretary, who facilitated all of the resident sessions, summarized the results and who kept us laughing while we worked through this important process. The results and next steps are summarized in this issue, along with a link to more details.

There is an upcoming transition in EMS services which is an important topic to a community with our demographic. Starting July 8, 2024 our EMS provider will change from Wake EMS to FirstHealth Regional EMS. Please consider registering for and attending an informational event sponsored by Lifestyle on June 3rd at

11:00 am in Bradford Hall where representatives from the Town of Cary, Chatham County and FirstHealth will be present to provide information and answer questions. Both in-person and virtual attendance are available, and the information session will be recorded for those who cannot attend the live meeting.

Even though it is just the beginning of June, it is already time to start planning for HOA Board of Directors elections. A notice regarding the formation of the Election Task Force (ETF) will be sent out soon. The Election Task Force article provides an overview of the role this Task Force in our Board elections for those residents who may be interested. As most of you know, submitting a volunteer form on the CP Website, is the best way to express your interest and qualifications for this and other community level responsibilities.

The CP and Amberly outdoor pools are open! That always feels like the start of summer to me. Summer is a very busy travel time for many. May you have beautiful weather; enjoy safe, healthy travels with family and friends; and remember to drink lots of water!

Carolina Preserve Strategic Planning

Since 2017, Carolina Preserve has developed a Strategic Plan for the purpose of setting goals and tactical objectives for the Community over a three-year horizon. The plan is updated bi-annually and serves as a road map that charts where and what CP will be attempting to accomplish. Our Strategic Plan sets us apart from other communities, and was the primary reason we were deemed a “Community of Excellence” by the North Carolina Community Associations Institute.

This year’s process is well underway with the completion of five focus groups. The purpose of these focus groups was to gather input to the next iteration of our Strategic Plan. Sessions were held with Kuester staff (both front desk and back-office staff), local realtors, and CP residents. The Board would like to thank the 51 residents, spread out over three sessions, who volunteered their time and energy into generating an enormous number of ideas and suggestions for the future of our community. Feedback from attendees was consistent that the process was well organized and efficient, and the time spent was worthwhile. The consolidated output from all five sessions may be found here: [Strategic Plan Working Documents](#), or by going to the *Governance* tab on Club Express and selecting *CP Strategic Planning*. The current version of Carolina Preserve’s Strategic Plan may be found on that page as well.

Next comes the Board’s difficult task of analyzing all the focus groups’ suggestions along with necessary amenity maintenance, budget goals and assumptions, and potential monthly fee increases to develop the first draft of this year’s Strategic Plan. The draft is circulated to the Community, and after one month’s time, the Board will finalize the draft based on the Community’s feedback. The plan is then input into the Budgeting process and presented at the Community Meeting in November.

Stay tuned for further details on the Strategic Plan, and in the meantime we encourage all residents to review the output from the focus groups as well as the current version of Carolina Preserve’s Strategic Plan.

Coming Soon: Election Task Force

Soon the Board will be convening the 2024 Election Task Force (ETF). The mission of the ETF is to manage the CP Board of Directors election process to ensure a fair and open election. The ETF carries out this responsibility by completing election-related operational tasks and managing election meetings and communication. There will be four open director positions for next year's Board.

The ETF's first task is to develop a schedule for the election. The schedule includes Task Force meetings, timing of communication with residents, schedules for conducting the voting, counting the votes and reporting the results.

Once the schedule is established, the ETF kicks off the actual election process by announcing the election schedule to the community and starting the recruitment process. A candidate application and application process are published in an eblast and made available on the ETF page on the CP website. The ETF schedule will always contain multiple eblasts and reminders of the schedule and the application deadline. The ETF may reach out to residents who have provided community leadership to encourage them to consider applying for the Board or to suggest other individuals who should be recruited. This first stage of the election process is critical because, in addition to ensuring a fair and open election, the ETF also has a mission of ensuring there are more than enough candidates to fill the open Board positions.

After the deadline for application has passed, the ETF works with the Management Company to verify that all applicants are in good standing and eligible to run. The ETF is then able to announce candidates to the community and provide opportunities for residents to become better acquainted with candidates and their qualifications. Candidate pictures are taken and provided on the CP website and in the Bradford Hall lobby along with their application statements. Questions for the candidates are elicited from the community and summarized into six or seven questions to which candidates respond in writing. Along with publishing the written responses, the ETF conducts the annual "Meeting the Candidate" event, typically in early October, where residents have the opportunity to see and hear candidate's off-the-cuff response to resident questions.

While the community is learning about the candidates, the ETF is also working to ensure that owners are ready to cast their votes. Regular communication from the ETF about schedule and voting are sent or published in community newsletters. Members are reminded that the covenants allow for one vote per residence. Also, votes are available to owners, not tenants. To ensure that owners are being polled, the official owner database, which is managed by our management company, is used. Kuester staff perform checks leading up to the election to ensure owner emails are up to date, but it is the responsibility of the owner to ensure they have their proper email address on file with Kuester. Members are provided a Get Ready to Vote test email to make sure they determine which member of the household will get the voting email and how to vote properly. Members have the opportunity to contact staff to resolve any issues before the actual voting begins.

Finally, usually in mid-October, voting gets underway. As mentioned above, most households receive an electronic ballot provided through Survey Monkey. The ETF also provides paper ballots at the front desk for those who choose that method of voting. Staff sends those owners who opted out of email voting, have no e-mail address, or e-mail of record bounced for whatever reason, a notice of election and a paper ballot. Residents using paper ballots are required to put them into the paper ballot box in the Bradford Hall front lobby themselves. The front desk does not accept paper ballots. Paper ballots faxed or mailed to BH are considered invalid and are not counted. Staff and ETF, working in teams of at least two, collect and count the votes, ensuring there is only one vote per residence. More details of this process will be discussed in future newsletters and as the ETF gets underway and are documented in the ETF charter. The ETF provides the results of the election to the HOA Board, who notifies the candidates and the community.

2024 Financials At A Glance

By David Jackson, HOA Treasurer

OPERATIONS (\$000'S)				
	April YTD			Full Year
	Actuals	Budget	Difference	Budget
Income	446	430	16	5,138
Uses:				
Reserves	(28)	(28)	-	(925)
Expenses	(358)	(404)	45	(4,209)
Net	60	(2)	61	3

RESERVES + EQUITY (\$000'S)						
	Replacement	Villa	IIF	Painting	Oper Resv (Equity)	Tot Reserves +Equity
3/31/2024	1,485	296	4	55	686	2,496
Contributions	25	-	1	2	61	89
Interest	5	1	0	0	-	6
Expenses	(23)	-	(9)	-	-	(32)
4/30/2024	1,491	297	(4)	57	747	2,559

Treasurer's Comments

By David Jackson, HOA Treasurer

Income and expenses are in line with the budget.

Resale income was up in April; there were eleven recorded resales of houses in CP providing over \$21K in revenue.

We are still getting higher than anticipated interest income from Certificates of Deposit (CDs). Three CDs matured in April. We rolled those funds totaling \$236K into 2 one-year CDs at over 5% interest. To date, we are \$3.4K favorable to budget for interest income.

Accounts with unusual cost overages were pool maintenance and supplies (\$17.8K), landscape projects (\$12.7K), slope stabilization (\$33.8K), and landscaping perimeter (\$31.8K). The Finance Committee will be reviewing those accounts.

The Capital Reserve is now at \$1,841K (including replacement, IIF, villa, and painting reserves). During April, the Replacement Reserve funded \$13K for information technology and \$10K for tennis court maintenance. The Contingency Reserve is now \$747K.

With the progress of the Strategic Planning process, we will soon be engaging in the budgeting process.

The attached Financials are compiled from reports provided by Kuester. As a reminder, we always provide additional information on CP finances on the club express website.



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

Rubbish and Debris

Summer is here! (Although it may not feel like it, because here in North Carolina we sometimes experience all 4 seasons in one day. 😊)

In June our main area of focus will be rubbish and debris. As numerous home projects commence and have commenced, please remember to dispose of any materials and trash in the appropriate trash cans and dumps.

On trash day, please remember that trash cans can't be out before 5p.m. the day before trash day and must be back properly stored the day after trash day. Trash cans and recycling containers must be stored in the garage or behind the home out of view of the street (except for hours before and after the scheduled collection day and time), stored on the side of the house/garage, or stored outside in an improved enclosure).

On a separate but important note, there have been several instances of crepe myrtle trees being topped off. Just to reiterate, tree topping of street trees is strictly prohibited under Section 3.3.25 of the Design Guidelines (pg 33) : [Document Link](#)

Wishing you all a wonderful June!

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 spotlighting Keri Diacumakos, the Carolina Preserve Wellness Director. Keri started with us as a fitness instructor in July 2018, and became our Wellness Director three years later.

Keri was born in Charleston, South Carolina but spent her younger years moving around the North and East, including stops in Illinois, Ohio, and New York. She spent her high school years in Corning, New York before returning to the South to attend Clemson University. Keri received her degree in Business Marketing at Clemson.



Prior to joining Carolina Preserve, Keri was in Human Resources for various companies, and after she had her first child, she became a stay-at-home mom. When it was time to re-enter the workforce, Keri decided to do something she was passionate about - Fitness. She started out as a fitness trainer for the Lake Norman YMCA while pursuing a certification in personal and group fitness, with a focus on cycling and strength training. She decided to add senior classes to her portfolio as she always enjoyed working with seniors, and this eventually led her to Carolina Preserve.

On a personal note, Keri enjoys working out, reading, cycling, and spending time with her friends and family.

As the Wellness Director, Keri plays a crucial role in shaping the health and well-being for our residents. Specifically, she is responsible for:

- The development and implementation of Comprehensive Wellness Programs to address the physical and health needs of our residents. These programs aim to enhance overall well-being and quality of life within the community.
- The collaboration with various professionals, including healthcare providers and fitness instructors to offer a wide range of wellness services and workshops to residents.

- The creation of marketing and communication strategies to promote wellness programs and increase participation among the community.
- Analyzing data from wellness program participants to assess the effectiveness of different initiatives. This analysis guides future programming.
- Managing the budget for wellness programs. This includes assisting in negotiating contracts with vendors, securing sponsorships, and allocating resources efficiently. She also is in charge of the hiring and managing of group fitness instructors and classes, as well as invoicing and payroll.
- Organizing health fairs, wellness challenges, small group strength training opportunities, and guest speaker sessions to engage our residents.

I asked Keri what a typical day is like for her, and she laughed and said she doesn't have a typical day. She really enjoys the diversity of activities and spontaneity that goes with the Wellness Director position.

Keri says her biggest surprise was how active the residents of Carolina Preserve are, and how invested they are in the community and each other. Activities like the Good Neighbor Walk, and nominating neighbors for the Good Neighbor award are amazing. Reading all the nominations and seeing what residents are doing for their neighbors is very inspiring to Keri.

As you can see, Keri has many responsibilities here at Carolina Preserve. We are fortunate to have such a dedicated professional in such an important role. Next time you visit the fitness center at Bradford Hall and see Keri, please say hello and thank her for all she does for 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

HOA Board Community Meeting
June 17 | 6:30pm
In person & virtual

July 16 | 1:00 pm
In person & virtual
