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Hello Friends & Neighbors,

Summer is in full swing with some really warm weather, and our community is buzzing with activity! Whether you are walking your dog, playing pickleball or tennis, enjoying the indoor and outdoor pools or relaxing inside Bradford Hall (in the AC) participating in a lifestyle or Club events, it's a joy to see so many of you out and enjoying everything our wonderful community has to offer.

As always, our goal is to make sure this community remains a vibrant, welcoming, and well-cared-for place we all love to call home. Whether you're new here or a longtime resident, your participation and spirit help make that possible.

Behind the scenes, your HOA Board continues to focus on projects that enhance our quality of life—whether it's maintaining our beautiful common areas, supporting events, or planning improvements based on your feedback. We are grateful for your continued engagement, suggestions, and ideas.

Stay cool, stay connected, and don't forget to check the calendar for upcoming events—we hope to see you there!



News In Brief



A new Carolina Preserve General Manager has been hired by Kuester. Judy Mann starts her training with Kuester on July 21 and will be starting her onsite role here at CP on August 4th. See more about Judy in the Manager's Report below.

The Landscape Committee resigned. The Board is currently reviewing all committee and Task Force charters and Counselor assignments in order to make sure that authorities and responsibilities are clearly described.



The Board has realigned some of its positions and responsibilities to more effectively address critical needed efforts.

Based on his extensive experience and demonstrated expertise, John Kasarda has been appointed as the liaison to the Facilities Advisory Committee, which is our largest committee that is tasked with addressing critical CP HOA issues. Additionally, he will lead the evaluation of complex proposals and oversee contract negotiations scheduled throughout the year.

Bob Muller (current Vice President) will become the President for the remainder of 2025. He will be the liaison to the attorney and Kuester

Bob Williams will be taking over as the Vice President for the remainder of 2025. He will remain the Assistant Secretary and be the liaison to the Board Election Committee. He will also remain our representative on the Amberly Master Board.

Steve Rich will be liaison to both the Club Advisory Committee and the Lifestyle Advisory Committee

Ron Lepionka will remain Treasurer and liaison to the Finance Committee

Ron Madl will remain liaison to the Architectural Review Committee, the Landscape Committee, and the Energy Efficiency Task Force



Stan Levine will remain Secretary and Liaison to the Information Technology Committee and the Software Assessment Task Force

Some of the President's typical duties will be delegated:

Drafting of Agendas, Robert's Rules, Meeting Structure – Stan Levine

Amberly Board representation and Amberly legal activities – Bob Williams

Lead Point of Contact to Onsite staff will be divided:

GM – Bob Muller

Terrie – Steve Rich – Lifestyle and Clubs

Josh – John Kasarda – facilities, contracts

Patrick – Ron Madl – violations

Glenda – Stan Levine – website, SharePoint, ClubExpress, communications

Rye – Stan Levine – documentation, storage, automation

Oscar – Steve Rich – Lifestyle and Club support

Keri - Steve Rich - Fitness



General Manager's Report



New General Manager

As shared in June, the Kuester Leadership team has been working closely with your Board of Directors to find the right person to lead the onsite team and serve the unique needs of your community. We are thrilled to announce that we have found someone who not only brings the right experience but also the energy and professionalism to make an immediate impact.

Judy Mann will officially be joining our onsite team as your new General Manager, with her first day of official service set for Monday, August 4, 2025. Judy begins her training with Kuester Management Group at our Corporate office on July 21 and will be on site the final week of July for community-specific onboarding. Our goal is to ensure she's fully prepared and ready to hit the ground running from day one. We're eager for you to meet her and are confident she will be a fantastic addition to both our team and your community.

Judy brings a wealth of experience from both Association Management and Private Club Management. She has worked with some of the finest private clubs and is known for her exceptional leadership, calm and capable presence under pressure, and her proactive, hands-on approach. Judy holds both the CMCA and AMS certifications through the Community Associations Institute and is widely respected throughout the industry. We believe you'll quickly come to appreciate her professionalism, approachability, and dedication to delivering a first-class experience for residents.

Operational Improvements Underway

In addition to the exciting leadership transition, Kuester's Operational Excellence team has been working closely with the onsite staff to improve internal processes and enhance the overall resident experience. We're pleased to share a few key updates:

New Work Order Reporting System – Your Voice Matters

We're excited to share that we've launched a new and improved work order tracking system designed to make it easier than ever for residents to report maintenance concerns and to ensure those concerns are addressed promptly and transparently.

A QR code is conveniently posted at the front desk in Bradford Hall. Simply scan the code with your smartphone to access the online work order form and submit your request in just a few clicks.

Not comfortable using the electronic form? No problem! Our front desk team is always happy to assist or submit the request on your behalf.

Here's what happens once your request is submitted:

- ✓ Your concern is immediately logged and entered into our tracking system.
- 🔔 The appropriate staff member or vendor is notified to take action.
- 👁️ The Board and management team have full visibility of all open and completed work orders.

This streamlined system is designed to help us better prioritize, respond, and communicate with you, so you never feel like your voice goes unheard.

As a friendly reminder, we kindly ask that you avoid stopping staff in the hallway to report issues. Submitting your request through the work order system ensures it's properly documented and handled as quickly and efficiently as possible.

Together, we're committed to creating a responsive, well-maintained, and resident-focused community—and we're proud to be your partner in that effort.

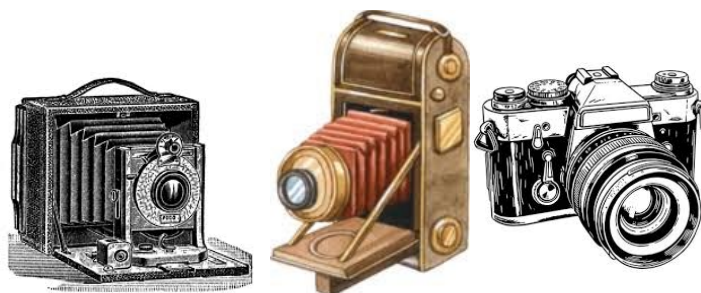
New Purchase Order System

In addition to the upgraded work order process, the Kuester Operations Team has collaborated with the onsite staff to implement a new Purchase Order system. This improvement is designed to ensure all vendor work is properly approved, documented, and tracked before any expenses are incurred. The goal is greater financial transparency, better oversight of community projects, and a more efficient workflow. All to ensure your community's resources are used wisely and responsibly.

Improved Vendor Sign-In Process:

We have also implemented a new vendor sign-in/out system to ensure our on-site team is aware of all vendors performing work in Bradford Hall and other common areas. This not only enhances safety but also supports better vendor oversight and accountability.

We are proud of the progress being made and excited for the next chapter under Judy's leadership. Thank you for your continued support as we work to make your community the best it can be!





Committee Reports



Architectural Review Committee (ARC)

As of July 2, ARC has reviewed and processed a total of 191 Modification Requests (MR) and 192 Fast Tracks (FT) since January 1. In addition, ARC has also completed 149 post audits of MRs and FTs. These Post Audits generally occur about 3 months after the approvals. Depending on the type of project, the post audits could just be a drive by, or when necessary (backyard projects), you may get a knock on the door.

When submitting a Modification Request, remember that ARC meets on the second and fourth Wednesdays of each month. The Fridays prior to those Wednesdays are when ARC reviews and analyzes each submittal to be sure that there is a complete understanding of the project and that all the needed information is in hand. If something is missing, ARC will be in touch with the homeowner immediately to clarify any issues. An ARC member is always on-call to assist homeowners with questions regarding the Design Guidelines. architectural.committee@cpamberly.net

Board Election Committee (BEC)

The Carolina Preserve HOA Board Elections are Coming Soon!

Just like the holidays, the annual CP HOA Board elections always come around sooner than we all think!

But unlike the holidays, there's no need to make all those stressful travel, shopping, and decorating plans – just be on the lookout for emails coming soon from your Board Election Committee providing all the information you'll need about how and when to become a candidate, including:

- ~Online candidate applications
- ~Candidate qualifications and campaign rules
- ~An in-person candidate information session (with refreshments!)
- ~Meet the candidates sessions
- ~A complete election timeline

Be on the lookout. Get involved – CP needs YOU!

Club Advisory Committee (CAC)

Are you a new resident of Carolina Preserve?

For those who are not new residents of CP, are you interested in learning about our wide variety of clubs and groups?

We have an event for you to:

Enjoy

Xtra

People, places, parties and pastimes

Of Carolina Preserve!

Club and Group Expo

Friday, September 5

2 to 4 p.m.

Bradford Hall



Facilities Advisory Committee (FAC)

The Facilities Advisory Committee has several sub-committees to address the large asset base that CP owns. You can visit the Committees page to see the members of the group, along with the members and the areas in which they are contributing their expertise. The group is getting off the ground, as each subcommittee's members become familiar with the assets which are being studied by that subgroup and are either locating or beginning to create documentation. The Contracts subgroup will be assisting in improving CP's RFP and Project Management processes, and will assist in evaluation of the RFPs, vendor bids, and the contracts. They will also be creating templates with best practices to be used by those who write RFPs in other groups and committees.

With the recent rainy and very hot weather the Facility Advisory Committee has had extra focus on issues related to the weather.

Stormwater: The rain has raised some stormwater issues at specific addresses. A master list of known situations has been compiled and those determined to be HOA responsibility are expected to be quoted as a package for remediation in the near term.

Determining the responsibility to solve problems, between the HOA and homeowners, is an issue that always arises. The CP policy that is used to determine this is being reviewed to clarify & simplify such future evaluations.

Irrigation: CP does not yet have maps of it's various irrigation systems. An effort to map and benchmark the performance of these systems has begun.

Fire/Sprinkler System: A section of the fire sprinkler system at Bradford Hall rusted through, leaking into the exercise room. The leaky section was replaced. An effort is underway to get a better internal inspection of the rest of the piping.

Pool Pumps & Piping: Much of the piping for the indoor pool is in the pump room. In the past year it has developed numerous leaks. An effort is underway to have the aging plastic piping replaced.

Outdoor Pool: The outdoor pool has 2 features that are supposed to be able to operate with pool side timers. They are the Vortex loop on the left side and the Bench bubble jets on the right side of the pool. They have been unable to operate on the timers as the pumps currently lose pump prime when they are not operating. An improvement to prevent this loss of pump prime is underway. Allowing these feature pumps to operate on a timer instead of all day(and night) long is expected to be a significant energy savings.

Electrical: The (incredibly frustrating) effort to work with Duke Energy about reducing some monthly recurring charges, due to our many billed accounts with them, has finally resulted in the elimination of some redundant monthly charges. Additional money saving topics have been raised with Duke and are awaiting their responses.

Insulation of BH: The Insulation project was completed mid May and we now have the first bill showing our Bradford Hall energy use in a very hot period. Compared to a similar period last year we used 13.3% less electricity in 10.3 % more billing days, or overall 23.6% less energy. These results include the other energy saving measures taken over the past year. And yes, these energy savings also means lower electric bills.

Temperature & HVAC Control: It has taken a long time, many months and much frustration, but we now have control of the thermostat for the exercise/gym room. Unbelievable!. We have been learning how best to control the room temperature and have also experimented with removing the air conditioning that was additionally supplied there from another HVAC system. The hot weather has shown this highly efficient system is now capable of good temperature control even in very hot weather. In addition, this means the other, aging, HVAC system will likely be able to be significantly smaller(and significantly less expensive) when it eventually needs replacement.

The datalogger effort to benchmark temperature control in Bradford Hall zones is showing how the summer heat is handled by the building HVAC. The locker room project has been providing much air conditioning to the indoor pool due to the propped open doors. With the locker room project nearing completion it has become obvious that the indoor pool air and water temperature both become high in hot weather. Considering the best way to remediate this will be an ongoing effort.



Finance Committee (FC)

The Finance Committee (FC) met on June 25. Key points from that meeting include:

- Landscaping costs continue to be lower due to less mulch being applied than was budgeted along with minimal slope stabilization, shrub and tree maintenance and other landscape projects.
- Electricity costs continue to run about \$2,000 favorable to budget as EETF savings were not built into the budget and water usage is back in line with budget, as previous leaks have been addressed.
- Irrigation repair has started but most of the costs associated with it have not yet hit the books.
- The Committee has initiated the 2026 budgeting process by updating the budget spreadsheet and gathering necessary assumptions (Interest rates, inflation rates, etc.). One of the outstanding questions for the Board is to establish the “subsidy” for Lifestyle Activities.
- The Committee has been working diligently with Club Treasurers to gather the necessary documentation to satisfy our auditors.
- The Committee continues to review several financial documents for content, possibly incorporating these documents into the CP Financial Policy, and potentially updating of terms and conditions. The documents include:
 - “Carolina Preserve HOA Financial Policy Version 12-20-2022”,
 - “Infrastructure Improvement Fund Project Development - Process and Procedures”, and
 - “Assessments Collections Resolution”.



Lifestyle Advisory Committee (LAC)

June saw a Pocket Park coffee (moved indoors), the Volunteer Expo and a number of Carolina Preserve (CP) University talks.

CP University talks continue in July – the 1 July talk on Electric Vehicles was very informative and brought some insight as to what was coming in that area. Sustainability is on the docket on July 15 at 1pm.

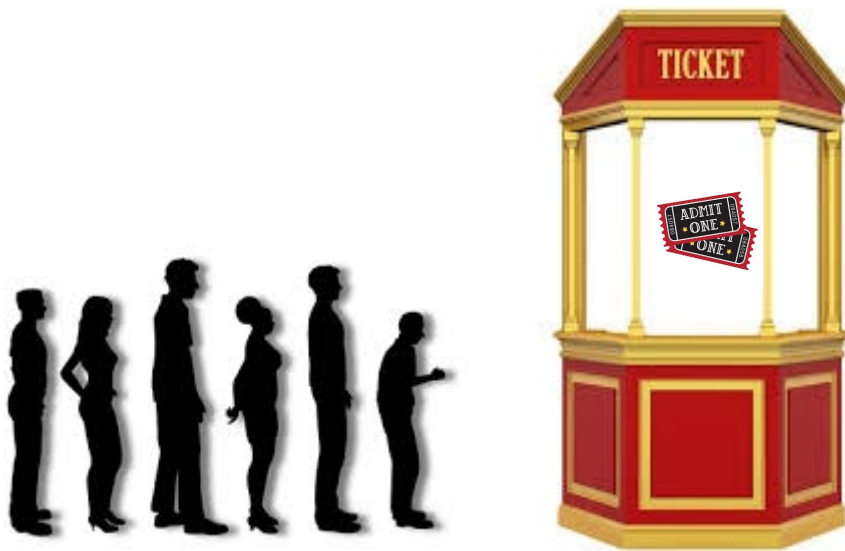
The really big news is that as of July 1st, registration is now open for artists wishing to participate in the CP Resident Art Expo on September 27. This first-time event is open to all CP residents and is free of charge. The event is ‘newbie’ friendly. If you have never exhibited your art in public, this event is one for you to try! There will be no sales at this event. It is simply to appreciate all the talents that reside in CP and to foster the artist community. There will be a reception following the Art Expo. Mediums that will be exhibited include: Photography, Painting/Drawing, Pottery, Fiber / Leather, Jewelry, Sculpture, Wood, and Mixed Media.

The preliminary artists' expression of interest has been very strong. To accommodate all the interested artists, artists can exhibit up to three works in two mediums.

An eblast was recently sent announcing the opening of artists' registration. Also look for information in the weekly Lifestyle newsletter.

For any questions, please contact Genie Lazcano at 919-469-0978 or Chris Reinhold at 317-496-9442.

Looking forward, on August 9, there is a new resident orientation workshop. This is a very worthwhile event packed with information to help new residents settle in and enjoy all that Carolina Preserve and the area has to offer.





By Ron Lepionka, HOA Treasurer

We had net income of \$9,000 for the month of May, which compared to a budgeted net loss for the month of \$(59,000), a favorable variance of \$68,000. Revenues were favorable to budget by \$8,000 due mainly to higher than budgeted resale fees. Landscaping expenses were favorable to budget by \$49,000 due mainly to the use of less mulch than what was budgeted and also no actual slope stabilization costs incurred.

Year to date through May, income was \$121,000, compared to a budgeted loss of \$(109,000), a favorable variance of \$230,000. Year-to-Date Landscaping costs were favorable to budget by \$175,000. Much of that is due to a timing difference of actual to budget on the installation and of, and payment for, the mulch, and also using 25% less mulch than last year. We also have favorable variances of \$20,000 in resale fees, \$20,000 in service contracts, a significant portion of which is the timing of the costs of our audit, \$10,000 in payroll costs, resulting from the GM vacancy and \$9,000 in Master Association assessments. There are many other variances, both favorable and unfavorable that net to the remaining difference.

Our Capital Reserves (made up of Replacement, IIF, Villa and Painting) total \$2.0 million at May 31, 2025. That amount continues to remain fairly steady.

We have \$1.6 million in CD's at a weighted average interest rate of 4.33%, and also had \$1.5 million in money market funds.

The Finance Committee has been preparing to start the 2026 budget process and the Facilities Committee is assisting in updating the Reserve Study. Both of these will really start progressing in July.

Complete financial statements have been posted to the website.





By Stan Levine, HOA Secretary

There is an ongoing effort to review and update our Policies and Procedures:

- The Board is reviewing comments to the By-Laws and getting ready to send it out to the community for a second review.
- The Compliance Policy has been renamed Violations Resolution Policy and updated as a draft and is being reviewed by the Board prior to sending it out for comment.
- The Facilities Use Policy is in the process of a major review and update.

There is an ongoing process improvement effort to improve the efficiency of the Board, Committees, and Kuester staff. Kuester has implemented a new form for reporting maintenance/repair work orders including landscaping issues. This form should be used for anything that is an HOA responsibility! A tablet has been mounted at the Bradford Hall Front Desk so that residents can easily fill out the Work Order Form. It has also been added to the computers in the library. The Contact Us Form has been modified to remove maintenance as a choice.

Four previous policies were officially retired since they had been included in other policies. They are:

- Replacement Reserve – in the Financial Policy
- Investment Policy and Delegation of authority – in the Financial Policy
- Message Board SOP – in the Facilities Use Policy
- Parking Policy with Estate Sales Policy – in the Facilities Use Policy

An updated Code of Ethics dated 6-10-25 was approved based on feedback from residents. It will be used in the future.



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**

ARC Makes It Easy For You

If you are a new homeowner or are considering a change to the exterior of your home or yard for the first time, please pay close attention.

All the information you need to submit a Modification Request for ARC's approval can be found in the Design Guidelines, which are on the CP website. Start with "Governance", then "CP Documents", then "ARC Design Guidelines". The Guidelines can be a bit overwhelming at times, but please take the time to search for the applicable information for your project. If questions remain after your investigation, that's the time to email ARC for additional help. ARC is more than willing to assist but doing your homework first will expedite the processing of your request.

All too often, ARC is frustrated by the number of Modification Requests that are submitted that are missing essential information. Before ARC votes to approve MRs on the second and fourth Wednesdays of each month, we also meet on the preceding Fridays to identify MR shortcomings and assign ARC members to follow up with homeowners that have incomplete information. Actually, ARC receives the list of MRs from Patrick Dzimiri, Compliance Manager two days before the Friday meetings, so that each member of ARC can read through the MRs looking for problems.

We understand that some of the requirements may be difficult to achieve (photos and plot plans, etc.), but ARC would appreciate your best efforts. Occasionally, we make exceptions, but in some cases, there is no way to approve an MR without the required information. Paying close attention to the "MR Requirements" in red at the bottom of each Guideline is essential.

ARC makes every effort to gather the missing information between our Friday and Wednesday meetings so that the homeowner does not have to wait another two weeks or more for the next review cycle. One option for ARC is to return the deficient MR to the homeowner and simply state that it is missing some of the requirements, and for the homeowner to resubmit the MR for the next review cycle, which will delay the project.

ARC appreciates your cooperation in this matter.

Compliance Corner

*By Patrick Dzimiri, Compliance
compliance@cpamberly.net*

Mulch

For most residents, mulch is something that's typically not on our community residents' minds unless there's inadequate mulch, which would be addressed by Yardnique, or a resident is looking to create a new mulch bed, or expand an existing one, in which case, a **modification request** needs to be submitted to the architectural committee.

Per **Section 3.3.1 of the Design Guidelines**, creation of new planting/mulched beds is permitted in the front/side/back yards where space permits, provided that a modification request has been submitted to the ARC AND approved by ARC.

Please remember to include the following in your MR packet/submission:

MR REQUIRED: Photograph of area to be modified; dimensions of the proposed bed and lawn maintenance access points; type of plants and size at maturity, diagram showing location of the plants, identification of all alternative living ground cover and plot plan.

Improper Use of Common Areas

Per **Section 3.3.4 of the Design Guidelines**, to be in compliance with Town of Cary policy, and Carolina Preserve Governing Documents, planting or gardening in slope areas or in HOA owned common buffer areas is prohibited, unless permission was previously granted by the Landscape Committee or ARC, continued maintenance by the homeowner is permissible.

The HOA assumes NO liability for a homeowner who might be injured either in the initial installation or in the ongoing maintenance in the HOA common area.

All the best this month.

Your Friendly ARC & Compliance Manager & Landscaping Liaison,

Patrick

compliance@cpamberly.net

2025 Committees

Architectural Review Committee (ARC)

John Bongino *Co-Chair* | Ken Merten *Co-Chair* | Ed Benfold
Bill Gurecki | Claire Hammitt | Kent Kjellgren
Board Liaison: Ron Madl | Staff Liaison: Patrick Dzimiri

Board Election Committee (BEC)

Darren Chesin *Chair* | Colleen Ferner *Vice-Chair* | Margaret Horst *Secretary*
Sharon Adamo | Michael Schwartz
Board Liaison: Bob Williams | Staff Liaison: Glenda Hunter

Club Advisory Committee (CAC)

Cynthia Jackson *Co-Chair* | Sandra Stein *Co-Chair* | Wanda Abel | Yvonne Gardner
Joel Glassman | Ian Jagoda | Cara Lehman | Francine McElhinney
Board Liaison: Steve Rich | Interim Staff Liaison: Brian Kelly

Covenants Committee (CC)

Richard Martin *Chair* | Stephen Bowers *Vice-Chair*
Herb Blum | Bob Lamar | Eldon Pearce

Facilities Advisory Committee (FAC)

Doug Brugler *Chair* | Eric Haake *Vice chair* | Stephen Bowers *Secretary*
Ron Alexander | Dave Bangasser | John Bowser | Don Gallagher
Kent Kjellgren | Sue Lowery | Ken Merten | Dick Perkins
Susan Rezai | Ted Steinwender | Carl Wrublewski
Board Liaisons: John Kasarda & Bob Williams | Staff Liaison: Josh Hughes

Finance Committee (FC)

Rahul Parikh *Chair* | John Adamo *Vice Chair* | Dennis Curtin | Colleen Ferner
Steve Harrison | Paul Wolf | Ted Young
Board Liaison: Ron Lepionka | Staff Liaison: General Manager

Information Technology Committee (ITC)

Alan DeCrane *Chair* | Bob Willenberg *Vice Chair* | Dennis Curtin
Jean Curtin | Brian Dos Santos | Jeff Hirsch | Margaret Horst
Board Liaison: Stan Levine | Staff Liaison: Glenda Hunter

Landscape Advisory Committee (LC)

Seeking volunteers

Board Liaison: Ron Madl | Staff Liaison: Josh Hughes | Staff Rep: Patrick Dzimiri

Lifestyle Advisory Committee (LAC)

Christopher Reinhold *Chair* | Robert Azar | Harlean Botha | Alora Burton | Nadine Dunn
Jackie King | Genie Lazcano | | Alice Stenstrom | Betsy Stevens
Board Liaison: Steve Rich | Staff Liaison: Terrie Murray

2025 Task Forces

Energy Efficiency (EETF)

Kent Kjellgren *Chair* | Doug Brugler | Todd David |
Board Liaison: Ron Madl | Staff Liaison: Josh Hughes

Software Assessment (SATF)

Dennis Curtin *Chair* | Margaret Horst | Bob Willenberg
Board Liaison: Stan Levine | FC Liaison: John Adamo
Staff Liaison: Glenda Hunter

2025 Board

Bob Muller

President,
Management Company & Attorney Liaison

Bob Williams

Vice President,
Assistant Secretary,
Amberly Master Association Rep

Stan Levine

Secretary, ITC Liaison, SATF Liaison

Ron Lepionka

Treasurer, FC Liaison

John Kasarda

Member at Large, FAC Liaison

Ron Madl

Member at Large, ARC Liaison, LC Liaison,
EETF Liaison

Steve Rich

Member at Large, CAC Liaison, LAC Liaison

Mark Your Calendar

Board Open Working Meeting

July 22 | 12pm

In person & virtual

Town Hall

August 5 | 1pm

In person & virtual

Board Open Working Meeting

August 26 | 12pm

In person & virtual

HOA BOD Candidate Information Session

August 27 | 6:30pm

In person & virtual

Board Open Working Meeting

September 23 | 12pm

In person & virtual

Formal Meet the Candidates

September 29 | 6:30pm

In person & virtual

Informal Meet the Candidates

October 15 | 2:30pm

In person

Board Open Working Meeting

October 28 | 12pm

In person & virtual