

November 2025 Issue LXXII

# Carolina Preserve

## HOA NEWS

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**What if, today, we were  
grateful for everything?**

**— Charlie Brown**





## President's Comments

As we approach the end of the year, I want to take a moment to thank every resident of Carolina Preserve for your continued support, patience, and involvement in our community. It's been a year of challenges, progress, and collaboration — and together, we've continued to make this an exceptional place to live.

Looking ahead, I'm excited to share that at our annual meeting on Nov. 18 you will get to meet two FSR transition team members when we officially welcome our new management company, **First Service Residential**. This marks an important step forward for Carolina Preserve. With fresh leadership, renewed focus, and a shared commitment to resident satisfaction, I'm confident that this transition will bring improved communication, greater efficiency, and continued commitment to keeping Carolina Preserve vibrant, welcoming, and the active Lifestyle we all want.

This new partnership will bring fresh energy, new ideas, and a renewed focus on resident service and community upkeep. Change can sometimes feel uncertain, but I truly believe this marks the beginning of an exciting new chapter for our neighborhood. The Board has worked carefully to ensure this transition is as smooth as possible and beneficial for all residents, with an emphasis on improving communication, responsiveness, and overall quality of life. As we look toward the New Year, the future looks bright for Carolina Preserve. With the dedication of our committees, counselors, task forces, staff and the enthusiasm of our residents, and the professionalism of our new management team, we have every reason to feel optimistic. Together, we can build on our successes, address any new challenges with teamwork, transparency and fiscal responsibility as we continue to make this community a place, we are all proud to call home.

I wish everyone a joyful and healthy holiday season and look forward to an exciting and productive year ahead.

**Bob Muller**



## General Manager's Report

As we progress towards the year end, it's been a busy and exciting time with the team. We are actively working on the transition to First Service Residential. We've had two meetings with their executive management team that were well received by the CP team. First Service introduced their management portal to us last week. The portal is user friendly and will enable us to manage work orders, landscaping tickets, ARC applications, and email functionality in one system, which will improve our current office processes.

The budget ratification process was self-guided this year by our team on the Election Buddy platform. We have worked to update homeowner email addresses and contacts, and we thank those of you who alerted us to dated or incorrect information.

We're commencing drainage projects in the coming weeks with NC Drainage. We will be out in the community with Yardnique and Brightview to stage dead shrub removals in the coming weeks in the community.

We hope to see you enjoying the events and the Club activities at Bradford Hall that are scheduled for November and December.

The staff wishes all of you a healthy and Happy Thanksgiving, we are thankful to serve the Carolina Preserve community!

Happy Thanksgiving,  
**Judy Mann**





## Amberly Report

By Dawn Schildhorn

### IMPORTANT [AMBERLY MASTER](#) BUDGET RATIFICATION UPDATE

(NOT posted “on behalf of the Master Board” or in my capacity as a Master Board Member)  
If you had been invited to attend any of the **non-confidential** Amberly Board meetings this year, as required under NC Law, or the recent Amberly Membership meeting to ratify the Amberly budget, you would have heard that...

Prior to the Budget approval vote, the Master Board was instructed that the \$2 plus million dollar Amberly draft budget (that CP will contribute @ \$720,000 to in 2026) could not be shared with anyone, including the sub association Board members or Finance Committee members. So, no one was permitted to ask “budget experts” any specific questions about the budget.

At the October regular Master Board meeting (which is a **non-confidential** board meeting) where the budget was adopted by the Board, one of many questions that was asked before the vote, which many homeowners wanted answered, is why Amberly budgets for \$0 for “interest income” from its bank accounts in recent budgets.

(Another reason why the question was asked is because last year a CP resident unexpectedly learned, while doing some research as a homeowner and after requesting some Amberly financial records, that Amberly Master had accrued @ \$40,000 in interest income in 2023, but had only reported @ \$7,000 of that interest income from reserves to the IRS.)

The [Amberly Master](#) GM stated that some reasons why Amberly doesn’t budget for interest income is because we “can’t count on” interest income, that it likely wasn’t going to be “substantial,” and that we use the interest income as some extra “padding” for the budget in case we need it.

It later became clear that [Amberly Master](#) will likely accrue @\$150,000 or more in interest income in 2025, despite that 2025 had budgeted \$0, and maybe even more in 2026, since we now have almost \$5 million dollars in reserves. Adding this unreported income to another budget line which had already been called the “padding line” of more than \$100,000, likely equals well over \$250,000 in padding for 2026 - and lots more budgeted for reserves.

As a result of this information, and some other information received only after the budget approval, I requested to revoke my approval vote but was told that I could not.



Before the budget ratification meeting, on 10/28/25, I requested access to the Amberly Bank statements, to determine exactly how much interest income we had accrued in 2025, and to see if I could determine how much interest income we could expect to accrue for next year (for example if some of the funds are in CDs with fixed rates through 2026).

FYI - Under NC Law, Board members are entitled to see **all** of the Association's financial records, and bank statements are undeniably deemed to be "financial records." Lot owners also have the right to access these records.

The acting GM did not fulfill my request to access the bank statements.

At the ratification meeting on November 6th, the acting GM stated that he would NOT be fulfilling the request, and said that the financial statements prepared by Kuester, which do not include the actual bank statements or much of the info about the accounts, should suffice - despite that NC Law is clear that Board members (and lot owners) are entitled to review and make copies of the **actual** financial records, and not just a management company's summation of records, to confirm that the financial statements are correct.

I have still not received access to the bank statements.

#### SUMMARY OF BUDGET RATIFICATION MEMBERSHIP MEETING:

1. Initially, the required Membership meeting was improperly scheduled as a Board meeting, so I objected and it was postponed from 10/23/25 to 11/6/25, due to lack of proper notice.
2. Since Association Delegates have still not been appointed, the 11/6/25 meeting was restricted to only the 7 Board members, who therefore had to act both as Association Delegates to ask the Board members (themselves) questions about the budget before voting on its ratification.
3. Most of the numerous questions were made on behalf of the CP Board members and Finance Committee; many went unanswered.
4. 5 of the 7 sub associations were present.
5. Since the budget ratification is a Membership meeting, the votes are exercised by Association Delegates based on the numbers of homes in their communities.
6. The acting GM disputed that a vote had to be taken, but I insisted that a vote be recorded.
7. As the CP Association Delegate, I made a motion on behalf of the 1360 homes in Carolina Preserve to NOT approve ratification of the budget.
8. Another sub association representative seconded the motion, totaling over 50% of the membership votes.
9. Three other representatives, representing less than 50% of the membership did not agree.
10. Despite that the majority of the membership voted to NOT ratify the budget, the budget was ratified because the Amberly Declaration requires 100 percent of the Membership to vote to NOT ratify the budget if its increase is not more than 10% of the prior year's budget.

CP is hopeful that a proposal to amend the Master Bylaws, which requires greater transparency, will soon be approved, and that the CPHOA Board and all Amberly homeowners will have greater input into the Master budget process in the future, as a result.



## Committee Reports

### **Architectural Review Committee (ARC)**

As of November 12, ARC has reviewed and processed a total of 327 Modification Requests and 329 Fast Tracks since January 1. In addition, ARC has also completed 217 post audits of MRs and FTs. These Post Audits generally occur 3-4 months after the approvals.

You may have noted that neighbors are no longer required to sign/acknowledge Modification Request forms. Nevertheless, letting neighbors know when you will be having contractors on site, especially outdoor work, is the neighborly thing to do.

Although it's in the Design Guidelines, this is a reminder that when you do have contractors at your home, they must not begin work before 8:00 am and must finish work before 9:00 pm. This has been added to all the Fast Track Forms and will also be a part of the Approval Letters that Patrick writes when MRs have been approved.

Don't be afraid to email: [architectural.committee@cpamberly.net](mailto:architectural.committee@cpamberly.net) if you have any questions regarding a project or the Design Guidelines. ARC always has a member on-call to help you with submitting a Modification Request or Fast Track.

### **Club Advisory Committee (CAC)**

This is a friendly reminder to club leaders and members about our guest policy in the Club Operating Manual, section 5 H.

**“Non-Resident guests are required to sign in at the Front Desk, wear a guest wrist band while attending a Club event or function, and be accompanied by a CP Resident. Clubs are required to ensure that all persons attending meetings or events are Club members or approved guests. Giving a guest list to the Front Desk is suggested.”**

## Facilities Committee(FC)

The effort to improve energy efficiency continues. It has been underway for over a year. A portion of that is to benchmark the HVAC system's performance and to establish the condition of the HVAC equipment. Bradford Hall has 11 separate HVAC systems that range from 1 yr old to original equipment from 2007.

The contract for HVAC planned maintenance was abruptly canceled in July, by the service company. Since then, significant HVAC equipment issues that will require repair or replacement have become known. A capable business has been selected and contracted to evaluate the performance and condition of all of these HVAC systems. Decisions on what should be repaired now or planned for replacement will be based on these findings. Additionally, a new planned maintenance contract for HVAC needs to be developed and implemented for 2026.

Data loggers have been recording temperature and humidity in various rooms over the summer and fall. This effort will continue through the winter and spring to provide further information on current system performance. Daily electricity use for the past 2+ yrs has been recorded and is being tracked for comparison with the daily temperature reports from the weather service.

A presentation and quote have been received from a business that expects to be able to help optimize our current HVAC system and recommend worthwhile upgrades. This will be further evaluated after current HVAC systems are actually repaired.

Villa irrigation has been an issue for many years. Many are not satisfied with how well this service is being provided. A recommendation to reconsider Villa irrigation was sent to the Board. The Board has sent a poll to all 192 villa owners.

Irrigation of CP common areas also suffers from many issues. Three of these systems were not operational this summer due to water line breakages. These 3 breakages have been recommended for priority repair to avoid the death of many plantings.

Modernization of the CP irrigation system is being evaluated and may bloom into a proposal to accomplish that.

The Bradford Hall structure is being evaluated for water intrusion issues. Issues on the parking lot side have been identified. Recommendations so far include repair to a breach in the siding and the need to remove excess mulch, improve gutter drainage and properly seal the walls at ground level. Evaluation of the issues on the opposite side (south side) of the building continues.

Several stormwater issues that have been identified as High Priority are now under contract and are scheduled for early 2026 completion. Several Medium priority issues are being evaluated.

Various issues with the outdoor pool, the spa and the indoor pool deck, including a new "salt" system to chlorinate the pools, have been quoted and are now under contract for early spring completion. A planned maintenance contract for the pool systems was developed and recommended to the Board for use for the new 2026 contract.

## Finance Committee(FC)

The Finance Committee met on October 22. Members reviewed and discussed variances to the accounts assigned to them. Additionally, we continued discussions on club accounting implications as we move forward into 2026 with our new management company.

We also had discussions regarding the transition of the financial records to a new accounting system. The Committee has expressed concerns about needing the ability to access historical financial records, including invoices. FSR is aware of our concerns and, hopefully, we can come to an acceptable option.

## Lifestyle Advisory Committee (LAC)

**CP University** sessions on Van Gogh, American Paris, and Survey of California Wines were well attended and enjoyable.

Our last CP University presentation will be **Valley Forge and the Making of the U.S. Army** on December 2<sup>nd</sup>. Our speaker comes highly recommended from the NC State OLLI program. This will be a great way to get a jump on the 250<sup>th</sup> anniversary of the American Revolution.

Get ready to be swept away by **The Vocalitas**—a powerhouse trio celebrated for their dazzling harmonies, dynamic stage presence, and irresistible charm. Their show blends timeless classics, fresh new favorites, and a touch of holiday sparkle to create a one-of-a-kind musical experience that lifts your spirits and leaves you smiling. Whether you love smooth jazz, soulful ballads, or upbeat swing, **The Vocalitas** will take you on a joyful journey through song. Don't miss *Harmony in Motion* featuring **The Vocalitas**, coming to **Bradford Hall on Tuesday, November 25 at 7 PM**—an unforgettable night of music and magic!

Our **2025 Lifestyle Survey** results were distributed to the community. Many thanks to the 425 residents who submitted 1100 comments!

Highlights include:

- Residents are deeply proud of CP's friendliness, beauty, and sense of community.
- The variety and quality of Lifestyle programs—from music to lectures and art—received especially high praise.
- New residents emphasized the importance of early, personal welcomes and neighborhood connections.
- Many appreciated the educational and cultural offerings, and suggested adding new wellness, travel, and intergenerational programs.
- Suggestions for the future include modernizing online systems, adding more events for younger and working residents, and expanding fitness and pool programming.

Thanks again for your input which shapes Lifestyle activities in the future.



## **Treasurer's Report**

**By Ron Lepionka, HOA Treasurer**

Net income was \$50,000 for the month of September, compared to budgeted net income for the month of \$28,000, a favorable variance of \$22,000. Revenues were up by \$8,000 as resale fees, interest income, seminar revenue and vendor fair revenue were all higher than budget. Landscaping was under budget by \$16,000 due mainly to lower slope stabilization and tree/shrub maintenance costs.

Year to date through September, income was \$236,000, compared to a budgeted loss of \$(22,000), a favorable variance of \$258,000. Revenues were up by \$52,000 due mainly to resale fees, interest income, seminar revenue, vendor fair revenue and other income being higher than budgeted. Year-to-Date Landscaping costs were favorable to budget by \$146,000. We also have favorable variances of \$14,000 in service contracts, \$7,000 in payroll costs, \$15,000 in Master Association assessments, \$11,000 in Villas Services, and \$10,000 in expense for utilities.

Our Capital Reserves (made up of Replacement, IIF, Villa, SCM and Painting) total \$2.3 million at September 30, 2025.

At September 30, we had \$1.6 million in CDs at a weighted average interest rate of 4.09% and also had \$2.0 million in money market funds. Those CDs are held at 16 different banks.

Complete financial statements have been posted to the website.



## Secretary's Report

By Stan Levine, HOA Secretary

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

The Board has submitted the latest version of the By-Laws to the attorney for review and to provide recommendations. When they are received, the Board will finalize it and then post it to the community

The Facilities Use Policy is in the process of a major update and review. The final draft has been completed and submitted to the Board for review.

The Contact Us form has been retired and is replaced with a direct email address for the Board: [CP.HOA.Board@cpamberly.net](mailto:CP.HOA.Board@cpamberly.net) . Directions on what topics may be sent to the Board are described in [the Contact Us page on the CP Website](#).

The Annual Meeting is scheduled for November 18, 2025, at 6:30 PM in BH and virtually. The notice is at: [2025 CP Notice of Annual Meeting 10.30.25 Final.pdf](#) .

The next Board Working Meeting is scheduled for November 25. The agenda and supporting documents are located where they always are: [CURRENT WORKING MEETING DOCUMENTS](#). Residents should provide any suggested topics or changes.



# 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)**



## 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.

# 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 | Ed Hammitt | Ian Jagoda | Cara Lehman | Francine McElhinney  
Board Liaison: Steve Rich | Interim Staff Liaison: Brian Kelly

## Covenants Committee (CC)

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

## Facilities Advisory Committee (FAC)

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

## Finance Committee (FC)

Rahul Parikh *Chair* | John Adamo *Vice Chair* | Dennis Curtin  
Colleen Ferner | Paul Wolf | Ted Young  
Board Liaison: Ron Lepionka | Staff Liaison: Judy Mann



### **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: Judy Mann | 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

**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

**HOA Annual Meeting**

**November 18 | 6:30pm**

**In person & virtual**

**\*Board Open Working Meeting**

**November 25 | 12pm**

**In person & Virtual**

***\*meeting subject to cancellation***

**Board Open Working Meeting**

**December 16 | 12pm**

**In person & virtual**