

Vision

FALL/WINTER 2019

THE VOICE OF
CALIFORNIA
COMMUNITY
MANAGERS



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First annual Halloween-themed golf tournament was spooktacular fun!

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INNOVATOR

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THE X FACTOR

How to find and hire quality employees.



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on the cover

FRIENDLY FOURSOME: Larry Hooper, vice president, Popular Association Banking; Shanne Ho, CCAM-HR, president and CMO, ProActive Professional Management; Brian Murphy, CEO, ProActive Professional Management; and Tim Kelley.



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Vision

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Do we know where you are?



Attention CACM members: Have you changed jobs or moved to a new location? Go to www.cacm.org and update your profile so you don't miss your next Vision magazine or any other important CACM communications.

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president's message

There are numerous ways to understand the meaning of "innovation." Origination, modernization, improvement, invention are all samples. I now have one year under my belt leading this great team at CACM in our continued effort to innovate the ways we provide our service to you in all categories of our membership. Like your jobs serving homeowner associations, it's not easy finding ways to be original, modernize and improve our service. But, like you, that's what we do.

So, I'm super happy that our modernized website is now in full operation. It's been improved with all of the bells and whistles of modernization. But we didn't stop there. We are in the process of upgrading our Association Management System (our membership database). What does that mean to you? Well, it's going to be much easier to navigate, review historical credentialing and certification records, and to easily obtain necessary member information and benefits.

As the saying goes, "But wait, there's more." Innovation implies modernization of technology, which is not accurate. We are also looking at ways to innovate our certification and credentialing process and requirements. As an example, the Master of Community Association Management (MCAM) is being modified to be more realistic to obtain and at the same time confirming the knowledge level of the applicants.

We are reviewing ways to streamline our courses, such as the financial courses that are in the final stages of being updated. The BAM and Ethics courses have been modernized. Legal courses are being updated to recognize the changes in statutes.

We are also improving our events and how we offer events. We have already to date held numerous localized networking events and knowledge-sharing lunches across California.

We also want to give back to you, the community we service. Our charitable arm, CACMStrong Foundation, is now in full operation. CACMStrong Foundation was developed to help our members and the communities you serve when disaster hits, such as the raging fires in 2018 that left many of our community members personally impacted. I encourage you to visit our new website for more information about CACMStrong Foundation.

Lastly, working in strong cooperation with our industry colleagues, we have been successful at impacting legislation. Legislators are reaching out to us for input, information and guidance on various legislative initiatives. By the time you read this, SB 323 was signed by the governor. However, we did in fact positively impact a negative bill through our lobbying efforts and meetings with the governor's office and legislators.

We seek ways to continue to be innovative. Have an idea? Please, share it with me.

I look forward to seeing you at our multiple holiday parties around California and at the Law Seminars.


Thomas Freeley, President & CEO



members in the news



Congrats to Menas Realty Company

San Diego's Menas Realty Company was recently awarded CACM's Accredited Community Management Company designation. President and CEO Julie Menas leads the company, which has 13 managers holding CACM's Certified Community Association Manager (CCAM) designation with another five working toward the certification. "Expanding their

knowledge and education makes them more valuable to the clients we serve and the company," said Julie Menas. "Homeowners don't just want a body in front of them. They want an experienced professional giving them good advice. Having an ACMC certification shows clients we're a reputable company and that we're an ethical company with integrity. It shows we can be trusted." Menas Realty Company, ACMC is proud to serve 150 different communities throughout San Diego and Temecula. ACMC management companies meet strict risk management, education and insurance requirements. "Julie Menas understands the importance of education in today's competitive marketplace," said Judy Levinsohn, Director of Education & Credentialing for CACM. "We congratulate her and her staff on achieving ACMC."

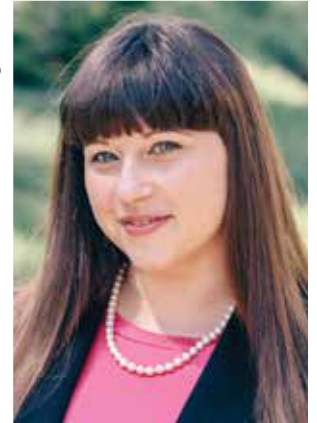
Richardson | Ober promotes Matthew A. Gardner, Esq.

Matthew Gardner, Esq., has been promoted to partner at Richardson | Ober. Gardner joined the firm in 2002 and made a significant impact on the growth of the company through client development, team leadership, education, and service to the community association industry. He will continue to counsel clients on risk management, reserve studies, rule creation and enforcement, and community governance, as well as serve as partner in charge of the firm's association assessment recovery department. Gardner is a native of Cincinnati. He attended the University of Notre Dame where he received a Bachelor of Arts degree in History. He obtained his JD degree from the University of Dayton School of Law.



Epsten Grinnell & Howell, APC promotes Dea C. Franck, Esq.

Dea C. Franck, Esq., was recently promoted to shareholder at Epsten Grinnell & Howell, APC. Franck joined the firm's Indian Wells office in July 2013. In the six years since she's been a part of its team, she has maintained and established numerous key relationships and clients throughout the Coachella Valley and is well-known throughout the community association industry. Franck plays an active role in producing the firm's annual Community Association Law Resource Book, speaks at the firm's annual Legal Symposia and has developed and taught countless educational programs for community association board members and managers. As a shareholder, Franck will lead the firm's Indian Wells office, with plans for continued growth in the Coachella Valley.



Industry partners donate roof to local nonprofit

IB Roof Systems and Antis Roofing and Waterproofing recently provided a new roof for Thomas House Family Shelter's new property. Teams from both companies gave their time and resources to the two-week-long project completed in August. The property is an expansion for Thomas House Family Shelter, increasing their capacity from 16 to 24 apartment units to house homeless families with children. IB Roof Systems donated all the materials and products for the project, while Antis Roofing and Waterproofing provided the labor at no cost. Thomas House Family Shelter is a nonprofit focused on providing a safe, supportive environment for homeless families with children.

members in the news



Powerstone makes OCBJ's Best Places to Work

Powerstone has made the Orange County Business Journal's Best Places to Work rankings for 2019 for the third year in a row. The community management firm made the ranks in the medium employer category, consisting of 50 to 249 employees. A total of 100 companies made the Best Places to Work list, which also includes small employer and large employer categories. The Orange County Business Journal conducts a survey to determine which participants are the best employers. The process is managed by Best Companies Group and winners are published in the newspaper. Some of the employee perks Powerstone offers are Flex Fridays for its managers to thank them for their night meetings; tickets to Angels games for the whole company and their families; summer family beach parties; quarterly meetings to discuss all things about the company; in-house events to celebrate just about anything – national ice cream day, national towel day, national selfie day, etc.; and Powerstone also has a gym at its Irvine headquarters for the entire staff to use.

Antis promotes Aaron Antis and Susan DeGrassi

Antis Roofing and Waterproofing has promoted Susan DeGrassi, former Director of Cause, to Vice President, Administration and Cause. The company also promoted Aaron Antis, former Director of Sales to Vice president, Sales and Field Operations. DeGrassi is a veteran of the community management industry.

She spent 27 years with Merit Property Management (now First Service Residential,) the last seven as Executive Vice President. In 2017, she joined Antis as Director of Cause to lead the company's philanthropic effort, primarily providing no-cost roofing to nonprofits with buildings in need of repair. She currently serves on the Board of National Women in Roofing. DeGrassi assumes added responsibility for the company's internal operations, including customer service and support, HR, IT and other administrative functions. Aaron Antis will continue to lead the Antis sales team and also oversee the field operations team. In his new role he is responsible for all client-facing work, including onsite operations, quality control and project management. Antis is the nephew of founder and CEO, Charles Antis. He joined the company in 2007 as a trainee roofer and has trained and worked in all of the company's core business departments since then.



Honorable Lawyers ...

Scott Mackey, Esq., of Berding | Weil was recently honored with a Lawyers of Distinction award. Andrew Crowl, Esq., and Michael Cochrane, Esq., of Hughes Gill Cochrane Tinetti, PC, were recently recognized as Super Lawyers, as was Rachel Miller, Esq., of The Miller Law Firm. Way to go!

members in the news

EBMC reaches half century milestone

EBMC recently celebrated its 50th year in business. The company was founded in Sausalito, California, by Eugene Burger and his partner, Theodore Barcelon, under the name Barcelon-Burger Management Corporation in 1968, specializing in the management of market rate and affordable apartment communities, commercial properties, condominiums and cooperatives. Shirley Burger, Eugene's wife, was the first to enter the field of property management. Shortly after Shirley started, Eugene entered the field and embarked on what would prove to be an extremely successful career in property management. Burger and Barcelon went their separate ways in 1979. Eugene Burger retained the original charter for the corporation along with approximately 35 employees and 50 properties. What started out as a dream between a husband and wife has blossomed into an innovative and service-oriented operation. Over the years, EBMC acquired a number of small management companies to expand and complement its operations. Its corporate headquarters are in Rohnert Park, California, but the company has offices in Auburn, Bakersfield, Novato, Sacramento, San Diego, San Francisco, San Jose, Windsor and in two in Nevada. Congrats EBMC!



Seabreeze acquires AMMCOR, hires new president

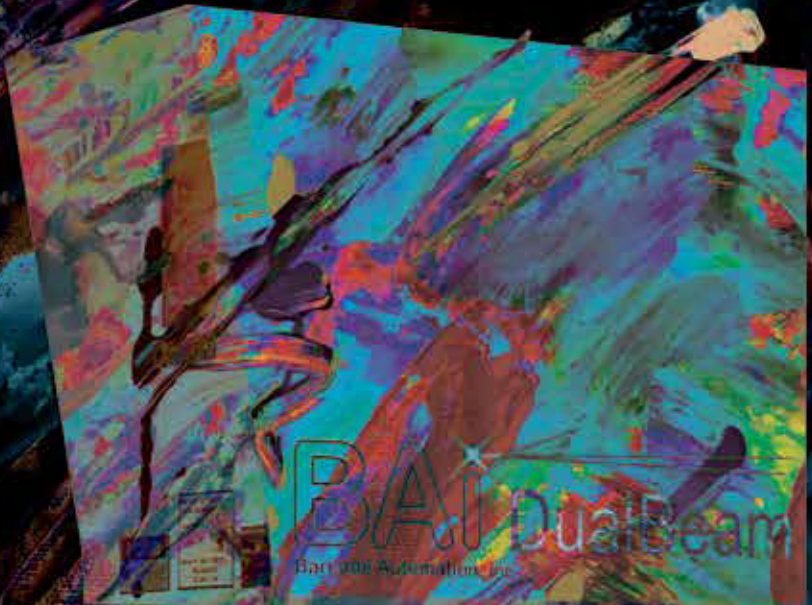
Seabreeze Management Company recently purchased AMMCOR Management Company in San Clemente.

Isaiah Henry, CCAM, CEO at Seabreeze, has assumed the role of CEO at AMMCOR. The move is part of a strategic ownership transition between Seabreeze and Dianne Davega, AMMCOR's owner and CEO prior to the acquisition. AMMCOR remains independent in name, but operates under the Seabreeze umbrella. With the addition of AMMCOR, Seabreeze now employs more than 400 people serving 320 associations and 100,000 homes. The acquisition comes on the heels of a banner year of double-digit growth for Seabreeze. The company also recently hired Karen Inman as President. She's overseeing Seabreeze's operations, including finance, operations, management and strategic direction.

Tinnelly Law Group celebrates big 3-0

Tinnelly Law Group recently feted its 30th year in business with an anniversary party at the Franciscan Gardens in San Juan Capistrano. Rich and Cathy Tinnelly started the law firm at their dining room table in 1989. The firm now employs 11 attorneys and represents more than 1,000 associations across California, ranging in size from 10 units to over 6,000 units. In addition to its headquarters in Orange County, the firm has offices in Los Angeles, San Diego County, Riverside County and the San Francisco Bay Area. Congrats to TLG on your milestone!





BARCODE AUTOMATION

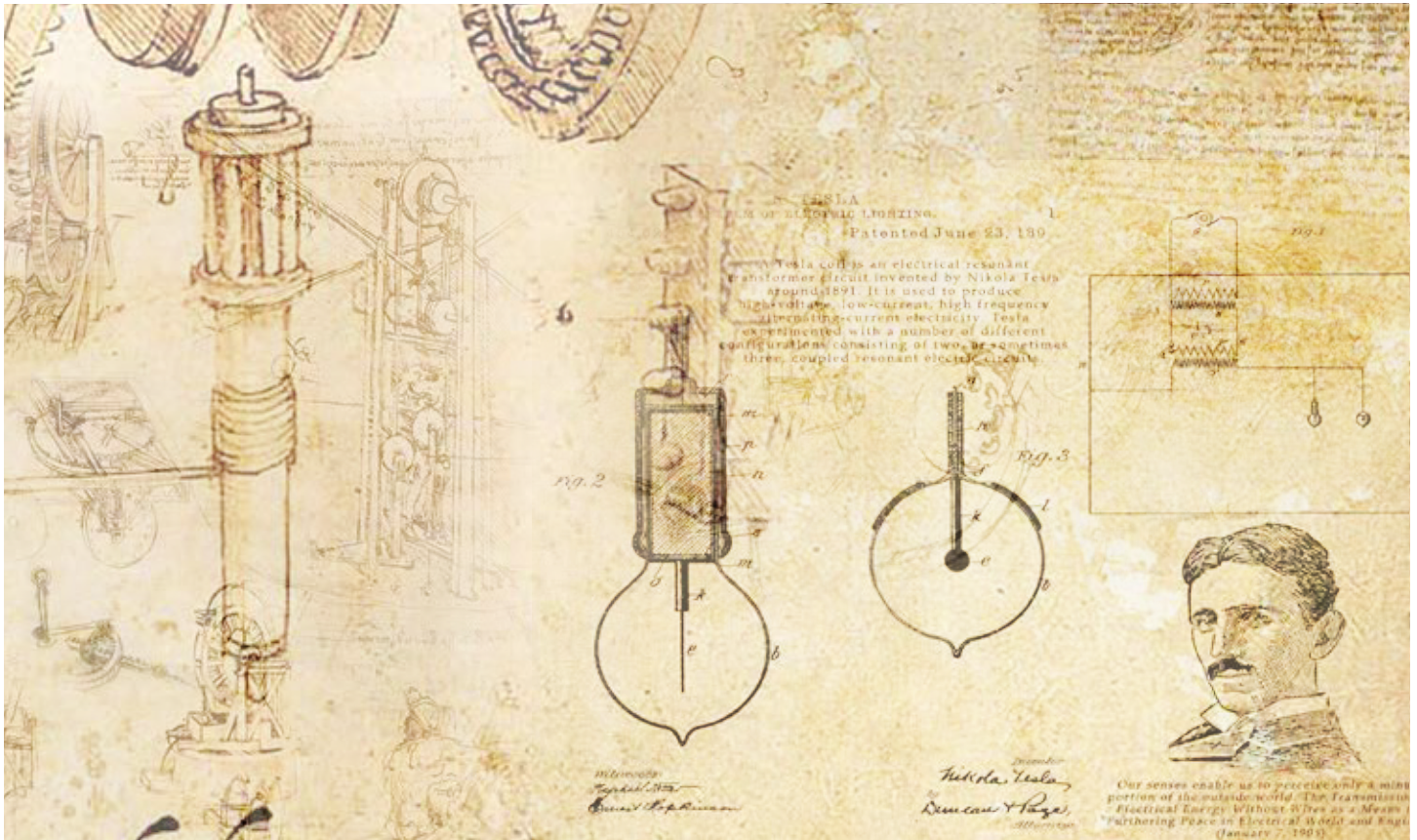
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from the roundtable

A MESSAGE FROM THE BOARD



Over the last few years, much has been written about the inventions that have changed lives, from items such as the wheel, to concrete, to automobiles, to electricity, to the most recent edition to these lists—the smartphone. As an early baby boomer, I remember the shoebox cellphone, then the flip phone, and now this smartphone gadget that may have 50 or more apps that allow me to access information from literally around the world.

CACM has certainly been a part of new world technologies. From our CACM website to our Facebook, Instagram and Twitter social media presence, we are touching thousands in the CID industry every day. Gone are the snail mail event reminders; now it's instant and timely reminders on our smartphone and email.

Even CACM board directors over the years have witnessed changes to how we conduct board business. Paper board packets are a thing of the past. Now directors access their board packet during the meeting with a tablet or laptop. Oh, and by the way, they access these digital files through our CACM website.

And then there are our Industry Partners who amaze us with new software that allow a compliance photo to be taken onsite and have the compliance letter and photo ready to be mailed before the manager returns to the office. These same Industry Partners also create software that allow our board directors 24-hour access to their association's financial information.

This is an exciting time to be a manager or vendor in our CID industry. With all the innovations we have experienced in the last 10 years, we can only wonder—what's ahead for us in the next 10 years?

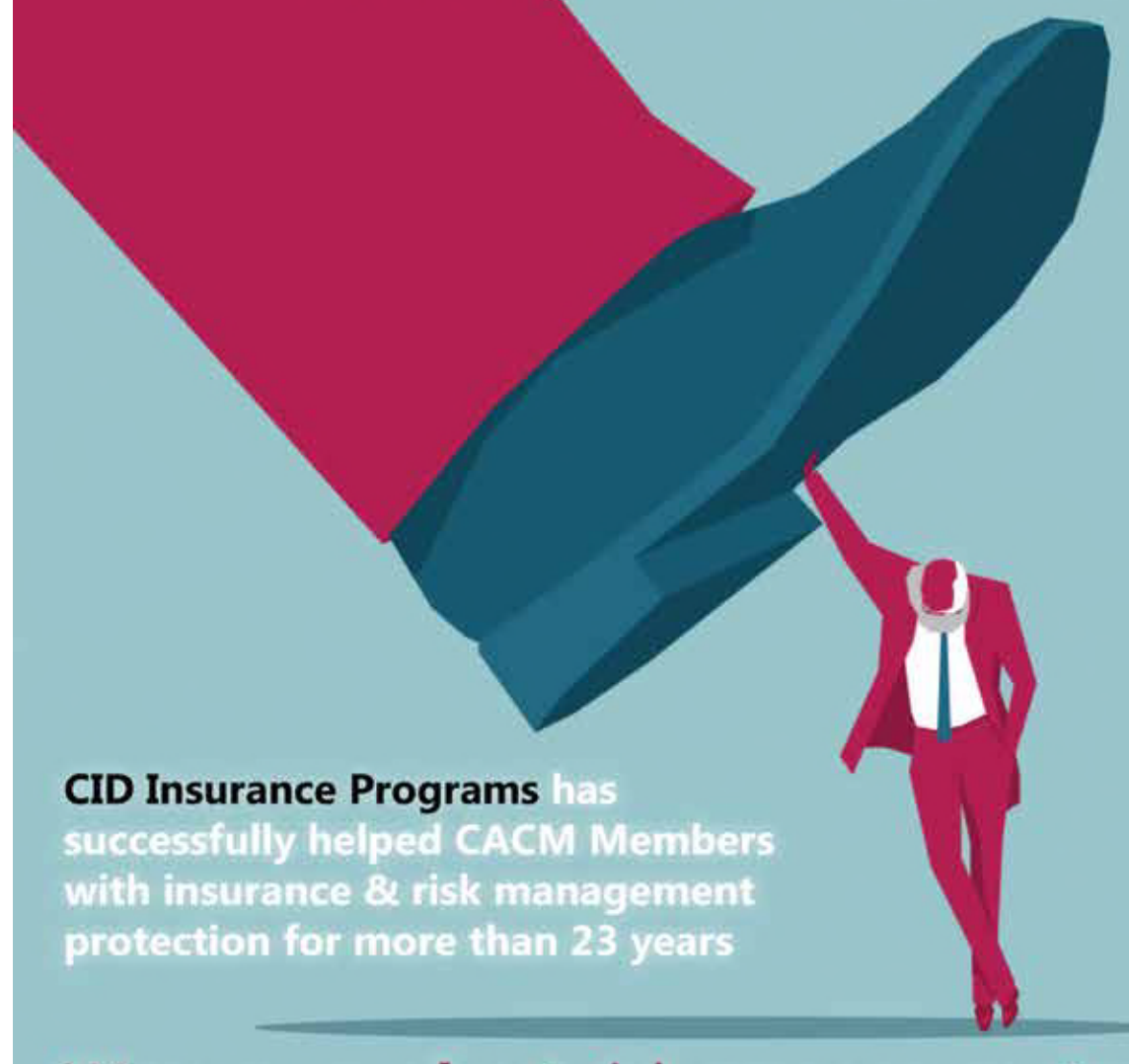
Thank you for your service to the CID industry.

On behalf of the CACM Board,
Phyllis Harkins, CAMEX,
CCAM-LS.AA,
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By Lynette Bertrand

DEAD IN THE WATER

Operations manager at East Lake Village Community Association tackles dead fish problem with floating islands. Solution becomes model for others.



When dozens of fish began floating at the resort-style lake at the East Lake Village Community Association in Yorba Linda, Jeff Leinen knew something was wrong. But it would take him a year and a half of research, testing, and talking to community managers and biologists across the country to figure out what was killing them.

Leinen, CCAM, who majored in graphic design in college, had no idea that his job heading up this community of 2,200 homes and keeping its lake healthy would eventually mean putting on a scientist's hat. Not only was the stench of dead fish prominent and residents who fished upset about the loss of their catch, but the midge fly population got out of control. Residents couldn't go in their backyard to barbecue without the flies



accosting them.

"That's when we realized, we have to have fish. It's all part of the food chain," Leinen said.

First, Leinen had to figure out what was killing the fish, then he had to find out how to tackle it. He began sending some of the dead fish to labs to get tested and find out why they were dying. The fish couldn't be dead for long for the testing to work, so Leinen had to capture the fish shortly after they died and pack and ship them next day to a lab in San Bernardino for necropsy reports.

"Nothing showed any reason why the fish were dying," Leinen recalled. "We were scratching our heads."

Leinen began reaching out to other homeowners associations with lakes to ask if they had experienced anything similar or if they had any suggestions of where he could look for answers. An association in Arizona responded with a potential culprit: golden algae, also

known as *prymnesium parvum*. Communities in Arizona and Texas were knowledgeable about this algae since they had been dealing with it since the 1980s. However, its presence at the time was non-existent in California.

Leinen began researching online, but couldn't find much information on golden algae. "When we got it, we didn't know of any body of water in California that had it. I spoke with the department of fish and game for over an hour. They said, 'You've done everything you could ever do.'"

However, Leinen continued in his quest. He researched some more online. He pulled a microscope East Lake Village had in its boathouse, and examined water droplets. He found that what was in the water was similar to what he had found on his internet searches for golden algae.

Still, he needed scientific validation to start to figure out what to do about it. There were no labs in California that tested water for this



organism. A Utah lab directed him to a lab in Florida and instructed him on how to pack a sample and overnight it there.

Shortly after he sent it, Leinen received a call informing him that the sample had tested positive for *prymnesium parvum*.

"We finally figured out what we had," Leinen said. "We spent a year and a half trying to figure what was going on."



One of the most challenging aspects was not having answers when residents approached him to ask why the fish were dying. And for over a year, Leinen had to say, "We don't know."

Leinen found the problem. The next hurdle was finding a solution.

"Once you have the algae, it doesn't go anywhere. You will always have it," he said. "But whether it releases toxins or not is the key. We were trying to figure out what the algae was thriving on."

Copper sulfate was a quick treatment that helped Leinen knock down the algae for a week or even a month at a time. But it wasn't a long term answer. For a couple of years, Leinen used copper sulfate treatments to contain the toxins of the golden algae.

Through his research, Leinen found a company that offered floating islands with plants that they claimed could take the nutrients that the algae thrived on, essentially starving the algae of those nutrients. East Lake became a beta test to see if these floating islands could help remove the toxins for the long term.

"At the beginning, it was a rough year," Leinen recalled. "The islands didn't look great. Our homeowners weren't happy with the looks. The hard part was that very few species of plants like full sun and complete root submersion in water. So our options were limited."

It took Leinen some time to figure out which plants would work and were also aesthetically pleasing. Then he had to install fencing on them to keep water fowl off of them—trying different types for effectiveness as well as visual looks.

DEAD IN THE WATER

Continued from page 13

Leinen said the islands completely changed the lake. Fish began to thrive again and an unexpected benefit was that the water's clarity improved as well within the first 12 months. In addition to the islands, the association installed new hydraulic diffusers to aerate the water.

The East Lake Village Community Association pulled from its lake cleaning reserve to cover the cost of the islands. While it wasn't cheap, the solution was much more affordable than others. Three years after the islands went in, Leinen hasn't had to treat the lake with copper.

"It's safe to say it's these islands," he said, adding that now they're mostly self-sustaining, although he's often seen weeding and trimming them himself.

Leinen, who has worked for East Lake Village Community Association for 29 years, not only fixed the dead fish problem, he shared what he found with other associations throughout California, which took the same approach to combat golden algae in their lakes. To this day Leinen fields calls from different lake communities and reservoirs who seek out expertise on golden algae, of which he's happy to share.



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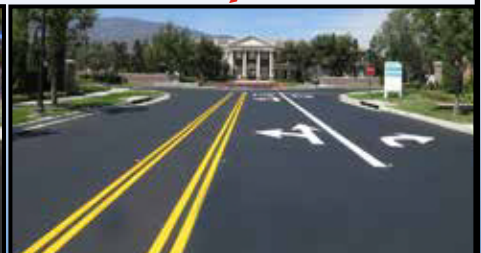
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you said it!



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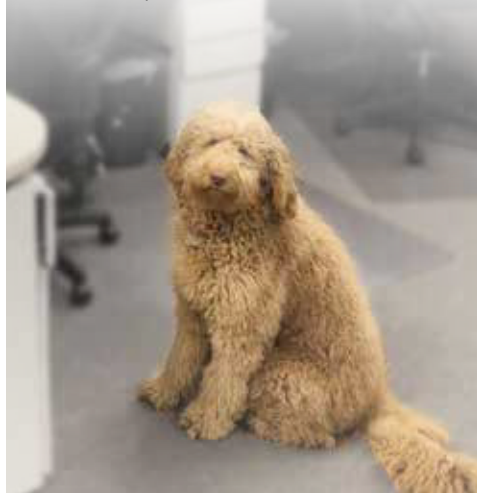
Milo belongs to VP and Membership Director Melissa Hurtado and we all had such fun welcoming this new team member in for the day. #CACMMascot #MiloTheMascot

f I've never understood how dogs can get so close to the ground! You folks are the best!
— James Judge, *The Judge Law Firm*



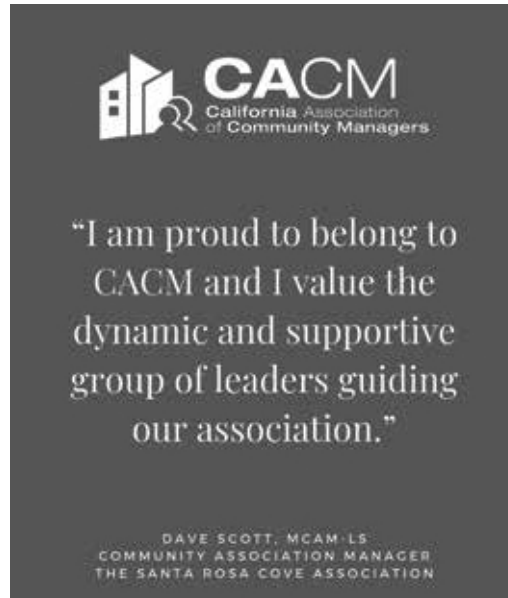
f Dogs are great for office morale!! Maddie Kennick visits S.B.S. often.
— SBS Lien Services

f And this is Olive the #officedood #doodle in our new offices visiting with her favorite coworkers. I love allowing dogs in the office, our homeowners and Board members love to visit and pet the doggies, and all of the employees love to have their favorite coworkers to play with throughout the day for much needed breaks. #officelife #pamc #hoalife
— Christina McCandless, CCAM, CEO at Principle AMC



CACM ASKS: HOW DO YOU INNOVATE?

in Our office closes during the summer on Fridays and our entire staff works remotely. I love giving our staff the benefit of working remote from home, they are more productive, start earlier, and stay on task. The great benefits they get are being able to work in their jammies, hanging out with their pets and cost savings from not having to commute that day. We stay in contact through video chat on skype, and have great communication all day long.
— Christina McCandless, CCAM, CEO at Principle AMC



in Congrats to Amber Korody for picking up her CCAM!
#CACM #congrats
— Walters Management



ON VISION'S SPRING/SUMMER ISSUE:

I just picked up my mail today and looked at the magazine. It looks terrific!!!

— Zayra Yves, CCAM-HR, Northpoint HOA

Great edition, full of informative and educational articles. I loved the graphics, contemporary and very appropriate.

— Phyllis Harkins, CAMEX, CCAM-LS, AA, Portola Country Club Homeowners' Association

Thank you CACM for featuring our Director of Cause, Susan DeGrassi, in the most recent edition of Vision magazine.

— Antis Roofing and Waterproofing

I received Vision magazine in the mail today. I really liked the emphasis on this year's Vision Award winners and the CACM Meet The Team section. Great job!

— Frank Alioto, CAMEX, CCAM, Community Management Services, Inc.

spotlight on education



GET TO KNOW OUR NEW FACE ONLINE

Do you know we launched a new website? CACM.org is your source for course enrollment, event information and registration and to read the latest member news. As a member, you also have access to member-only resources including the career center, business and service directories, industry data, member logos, and certification requirements and applications.

On the website, members can view and download recent issues of Vision Magazine and Law Journal, myCommunity newsletters, and CACM brochures. You'll find legislative resources as well including the CACM Legislative Report, Bill Tracker Report and CACM's Political Action Committee updates.

Also under Member Resources are CACM's Code of Ethics, The Basics of Association Management Toolkit, the California Business and Professions Code Antitrust Policy and other necessary documentation to ensure you are managing your communities professionally.

Whether you're looking for your next career move or looking for that next great hire, we believe CACM's Career Center is your best source. Visit today and sign up at careers.cacm.org.

The all new Industry Partner Directory (www.hoasupplier.com) and HOA BoardSite (www.hoaboardsite.com) allow consumers to search for trusted management companies and industry partners by region, category of service, company name and more.

Looking for filler for your monthly homeowner newsletters? We've got plenty for you to copy and paste. Under Member Resources, click on newsletter content and choose from the following categories: child safety and well-being; earthquakes; fire; holiday safety; household tips; neighbors; personal happiness; pests; and pets.

CACM's new website is easy to navigate and find what you're looking for. Register for an event, sign up for educational courses, browse our directories and job boards or read the latest industry news and CACM press releases. We've bolstered the information and made our site tablet and mobile friendly.

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NEWLY CERTIFIED: Hamlet Vazquez, MCAM-HR

By Lynette Bertrand



“For me, whatever I do, I want to do with excellence. Certifications teach you how to do your job better, plus I love to learn.”

What does pastoring and community management have in common? Just ask Hamlet Vazquez, MCAM.

Hamlet is a former pastor who years ago became a full-time high rise community manager.

“I found they both require the same skill set since at the core of both professions you are constantly dealing with people and handling problems,” he said.

Hamlet recently was awarded his Master of Community Association Management (MCAM) designation. Hamlet migrated from Mexico at a young age and grew up in the San Fernando Valley. He attended one of the Ivy’s, The University of Pennsylvania in Philadelphia, where he majored in psychology, then studied theology in grad school in Illinois. After earning his Master’s in Theological Studies, Hamlet pastored in Minnesota for seven years before beginning his journey into high rise community management at a luxury high rise in downtown Minneapolis.

Hamlet eventually made his way back to California with his wife and two sons after one of his sons developed a diagnosed allergy to cold weather.

Hamlet is the onsite manager of West Ocean Association with two high rise buildings in downtown Long Beach, California, where he’s worked for nearly a decade.

What has helped Hamlet succeed in his current role? He says he has been blessed with the right mix of personality traits. Hamlet took an online talent assessment test and found that his top strengths are

fairness, harmony, focus, achiever and learner. So it’s no surprise that Hamlet has made it his life mission to learn. He obtained his CCAM and specialty designation in High Rise, and now, earned his MCAM. He’s also working on his MBA, and pursuing a national certification in community management.

“For me, whatever I do, I want to do with excellence. Certifications teach you how to do your job better, plus I love to learn,” he said.

Hamlet, who is a community manager employed by Action Property Management, says every association presents a unique challenge. He likes the variety that high rise managing offers. As a high rise manager, one of his biggest challenges is plumbing. One leak or pipe burst usually means flooding on multiple floors and major damage. It’s what keeps him up at night.

Having the right staff, especially a knowledgeable engineer, on board is key. At a luxury high rise, homeowners come to expect a high level of service and Hamlet and his team help ensure that those expectations are met. “We aim to provide five-star service for our residents,” he said. “The best feeling comes from knowing you are meeting those expectations.”





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CALIFORNIA

CID STATS & FIGURES

While development has slowed, the community management industry continues to expand year-over-year with 2019 seeing 1% growth in California CIDs. Southern California continues to represent 66% of the overall associations, while Northern California remains at 34%. The state of California represents nearly 20% of the entire HOA industry across the United States. California is a central hub for the industry.

Millions of Californians enjoy the many benefits of CID living including the life enhancing amenities, a sense of community and preservation of their investment. Though small, the increase in associations means that there is still a need for qualified, professional community managers.

CACM has been committed to educating and supporting community managers for the past 28 years. Founded on the philosophy that managers need a safe, professional place to network and share with other industry professionals, CACM continues to build on that philosophy providing relevant educational opportunities that address what managers face in a fast-paced, ever-changing industry.

By taking advantage of the professional growth opportunities CACM has to offer, you are setting yourself up for success as an industry leader who is ready for growth! This 2019 industry snapshot proves just how indispensable you and your expertise are to millions of Californians.

58 (100%)

**CALIFORNIA
COUNTIES WITH
COMMUNITY
ASSOCIATIONS**

**\$13.3
BILLION**

**AGGREGATE ANNUAL
REVENUE ESTIMATED
FOR CALIFORNIA
ASSOCIATIONS**

21 years

**AVERAGE AGE OF A
CALIFORNIA CID**

**NORTHERN CALIFORNIA
REPRESENTS
34% OF OVERALL
ASSOCIATIONS**

34%

2019 SAW
A 1%
GROWTH IN
CALIFORNIA
CIDS

1%

66%

**SOUTHERN
CALIFORNIA
CONTINUES TO
REPRESENT 66%
OF THE OVERALL
ASSOCIATIONS**

**TOTAL NUMBER
OF COMMUNITY
ASSOCIATIONS IN
CALIFORNIA**

54,065

93 units

**AVERAGE SIZE OF
HOA COMMUNITY**

**CONDOMINIUMS
ARE THE LEADING TYPE
OF DEVELOPMENTS**

\$244,000

**AVERAGE
ANNUAL
REVENUES AT
A CALIFORNIA
ASSOCIATION**

35%

**35% OF CALIFORNIA
HOUSING UNITS
REPRESENTED BY HOAS**

Source: 2019 California Community Association Statistics by Levy, Erlanger & Company LLP.



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GOVERNOR NEWSOM SIGNS SB 323 INTO LAW

What's next? Plus, other bills that will impact homeowners associations in 2020.

By Jennifer Wada, Esq.

Another legislative session has come to a close. Housing was at the top of the Legislature and the Governor's agenda this year. The session ended with high profile legislation on rent control and other affordable housing measures.

"Since taking office in January, my Administration has been urgently focused on California's housing affordability crisis," said Governor Gavin Newsom, in a recent press release. "The high cost of housing and rent is putting the squeeze on family budgets, and our housing shortage threatens our economic growth and long-term prosperity.

"In 2019, California has taken urgent action to address this challenge. We've invested more in new housing than at any point in our history, and we have created powerful new tools to incentivize housing production. Now, we are removing some key local barriers to housing production. This crisis has been more than a half century in the making, and this Administration is just getting started on solutions," Governor Newsom added.

Of course, there was no shortage of CID bills. For the industry, the end-of-session activity largely involved our efforts to kill SB 323, which would, among other things, eliminate an association's authority to impose candidate qualifications except under limited circumstances. As is typical, the sponsors of this measure alleged that HOAs and management companies are conspiring to retain their ordained slate of board members and barring any candidate that may have differing views.

The sponsors claimed that HOAs across the state are imposing overly-restrictive and unreasonable candidate qualifications in order to maintain control. CACM had asked for examples of these improper qualifications in order to assess the scope of the problem and proposed numerous amendments. Unfortunately, the bill continued to impose a one-size-fits all approach that CACM had to oppose.

One glaring problem with the bill was language that would prohibit a board from imposing a disqualification if a candidate had been

convicted of a financial felony. As you know, many insurance policies will not cover or will terminate coverage in this instance. CACM lobbied the Legislature and met with the Governor's office about this problem. To address the inability of an HOA to obtain statutorily required fidelity insurance under the bill, the author amended the bill to allow this felony disqualification if it prevented the HOA from getting fidelity coverage. Unfortunately, the amendment didn't address other types of necessary insurance coverage and CACM remained opposed to the bill.

CACM aggressively lobbied against SB 323 until the bitter end. Unfortunately, despite numerous meetings with the Governor's office and a robust veto campaign, the Governor signed the bill. He did not include a signing message but we assume he signed it in the spirit of fair elections.

A bill closely related to SB 323 that was also signed was SB 754 (Moorlach), sponsored by Laguna Woods. This bill started out as a great bill – to allow HOAs to use election by acclamation. CACM strongly supported that version. Unfortunately, the same thing happened to this bill as happened to last year's bill: in exchange for the acclamation piece, the author was forced to accept the SB 323 candidate qualification language.

In an effort to narrow the damaging effects of that language, Laguna Woods narrowed the scope of the bill to HOAs of 6,000 units or more. The downside is that now that SB 323 has been signed, everyone still has to live with the candidate qualification requirements, but only associations over 6,000 units may use election by acclamation. The upside is that it should now be easier to extend the piece to all associations.

OTHER BILLS WHICH WERE SIGNED AND THOSE THAT NEVER MADE IT

AB 670 (Friedman – CID Accessory Dwelling Units) would prohibit associations of single-family residential developments from prohibiting the construction of an ADU or junior ADU. Originally, this legislation outright prohibited an association from objecting to ADUs. CACM negotiated this bill with the author, sponsor and policy committees to ensure that associations are given great

deference with respect to the ability to impose reasonable restrictions. We raised a multitude of examples of how CIDs have unique issues that must be addressed. This bill now allows HOAs to impose reasonable restrictions, which are defined to mean restrictions that do not unreasonably increase the cost to construct, effectively prohibit the construction of, or extinguish the ability to otherwise construct, an accessory dwelling unit or junior accessory dwelling unit consistent with the provisions of Section 65852.2 or 65852.22 of the Government Code. As you well know, policies to encourage ADUs as a source of affordable housing abound and AB 670 was part of the Legislature's effort to increase the affordable housing stock. The Governor signed this bill into law and it is effective January 1, 2020.

SB 326 (Hill) is the balcony bill for CIDs. This bill requires a visual inspection of load-bearing components and associated waterproofing systems to determine whether exterior elevated elements in condo associations are in safe condition. It also requires, in the event the inspection report indicates an immediate threat to the safety of occupants, the association takes immediate preventative measures, such as preventing occupants to access the exterior elevated element until the repairs have been inspected and approved by the local code enforcement agency. The bill would also prohibit developers from having veto authority over whether to commence construction defect litigation. This bill has been chaptered into law and is effective January 1, 2020.

CACM was a co-sponsor of **SB 434** (Archuleta) but this bill never made it out of the Legislature. This bill would have required a managing agent whose management agreement has been terminated to produce client property and records within a specified period of time pursuant to a written request by an association. Unfortunately, the Senate Judiciary committee would not let the bill move forward unless we also included an affirmative duty on managers with respect to records. While CACM's managers already abide by a code of ethics and take great pride in maintaining client records, the proposal would have exposed managers to additional liability and because of this, we chose to abandon the bill.

SB 234 (Skinner – Family Daycare Homes) has been signed by the Governor and goes into effect on January 1, 2020.

This bill requires local governments to treat licensed large family daycare homes as residential use of property for purposes of all local ordinances, giving large family daycare homes the same status as small family daycare homes with regard to local ordinances. The bill also provides that it does not alter the existing rights of landlords and tenants with respect to addressing and resolving issues related to noise, lease violations, nuisances, or conflicts between landlords and tenants. The author's office indicated that HOAs are already prevented from restricting family day care homes. Specifically, that the California Child Day Care Facilities Act broadly voids any written instrument relating to real property, which includes an HOA rule, CC&R or separate agreement, attempting to restrict or encumber the use of residential property for a family day care home.

SB 652 (Allen – Display of Religious Items) was signed into law and is effective January 1, 2020.

It prohibits an association's governing documents from prohibiting the display of religious items on the entry door or entry door frame of an owner's separate interest. The bill provides an exception to this prohibition for maintenance, repair or replacement of an entry door or door frame.

We will see what the 2020 legislative session has in store for us. I anticipate it will be full of more affordable housing measures and as always, an affirmative attack on HOAs and managers. We must mobilize and be prepared for what comes next.

Thank you to all of you that participate in CACM's public policy program. It is up to us to ensure California's policies reflect the needs and professionalism of the management industry.

Jennifer Wada, Esq., is an attorney, CACM's legislative advocate and principal of Wada Government Relations in Sacramento.



THE INNOVATORS

FROM BOTS TO SOLAR PROJECTS, HERE'S HOW MANAGERS ARE INNOVATING IN THEIR COMMUNITIES.

AMONG US

BY LYNETTE BERTRAND

AUTONOMOUS SECURITY

Rosie Beabot has made a huge difference at The Beacon in San Francisco over the past year. Since being put into service last October, the mixed-use condo and retail development has seen a decrease in vagrancy and crime.

"We were looking at alternative solutions to security service," said Bruce Ratliff, CAMEx, CCAM-HR.CI, general manager, Beacon Commercial Owners Association. "I contacted [company] and asked them to give us a demonstration of the robot. They came to our site and did some mapping on our premises and showed us how the robot worked."

Ratliff, who works for Eugene Burger Management Corporation, said that Rosie works around the clock and has saved the association about \$42,000 a year while reducing human patrol time by hundreds of hours. But more than the savings, she's been instrumental to keeping a watchful eye on criminal activity.

"In San Francisco we have a huge transient and homeless population," he said. "They were getting into places they shouldn't. We have a center area, our public space, it's a bench and courtyard that the public can come and sit down and watch people. We get a lot of people passing through and

hanging out. The robot comes by and we can talk through her and move people along."

On top of surveillance, Rosie tracks analytics like the number of people that pass through the property during rush hour every morning and evening. She has license plate recognition and can pick up other tech devices in the area, like mobile phones. Through this technology, she's helped identify stolen vehicles and alerted local police about theft.

But it hasn't been rosy for Rosie. One person beat her with a bar until her wheels fell off. She's been subject to vandalism several times, but the supplier repairs and maintains her.

Ratliff said Rosie was the first security robot in service in a mixed-use development. The Beacon has 1 million square feet of retail and 595 condos. "She's not indestructible but I can say she's worth the value," he noted, adding that The Beacon still has onsite human roving security officers too.

The Beacon Commercial Owners Association held a naming contest to come up with a name for the robot. Rosie was a top suggestion, after the Jetsons character, as well as Beacon bot. So a combination of both became her name – Rosie Beabot.

"She's very autonomous. We can schedule her where we want her to go. We can talk through her. She sends alerts and warnings and has a patrol sound," Ratliff said.

Bruce Ratliff, CAMEx, CCAM-HR.CI, general manager, Beacon Commercial Owners Association



SMALLER CARBON FOOTPRINT

It took nine years to find the right vendor. Then it was getting all the contracts right among the various parties. But Ronnie Rosen, CCAM-HR.LS, is close to the final stretch of her community's solar project. In late September, about 40 percent of the buildings at Shelter Creek Condominiums had solar arrays ready.

When fully powered, the 2.5 megawatt solar system will offset 75 to 85 percent of electricity use at the 1,296-unit development. The project was set to be completed and panels operational by late October.

Rosen said the idea for solar came about due to increasing rates from the local electricity provider, Pacific Gas and Electric Company. "I wanted to make this property sustainable," she said. "For a 45-year-old property, that can be a challenge."

A decade ago, she began with LED lighting in all of the common areas. The community also has 10 EV charging stations and fiber optics, the latter which was gifted to the community by the city of San Bruno. With the new solar system, homeowners are locked in for a much lower kilowatt per hour rate for the next 20 years. Rosen estimates the community will save \$1.8 million over the course of two decades.

More importantly, the new solar system comes at no financial outlay to Shelter Creek. Through a power purchase agreement, the supplier provides the system, install and maintenance in exchange for a percent of the kilowatt hour rate. They also get to keep any rebates, but Rosen said as a not for profit organization, Shelter Creek can't take advantage of rebates anyway.

"The reason we liked them was they do more installations for nonprofits, municipalities and hospitals," Rosen said. "They really



knew what we needed as a mutual-benefit nonprofit corporation."

Rosen said the community had several townhall meetings before making the decision. "The residents are absolutely ecstatic," she said. "But it took a lot of hunting and a lot of years to make sure we had the right company."

Many solar providers couldn't support solar for the whole property. The install is the largest solar project for a multi-family dwelling in Northern California.

"The hardest part, at least for me, was making sure I understood everything about solar so I could teach the board and they could learn as well," Rosen said. "It was neat to see these people from all different walks of life, seven board members came together for this decision."

Rosen cautions that buying solar isn't for everyone and that communities considering a power purchase agreement should pay close attention to the kilowatt rate and keep that low and fixed through the life of the contract.



CRISIS HANDLER

When a community is in chaos, Laura Ravazza, CCAM-PM, is sent to the rescue.

"I specialize in properties that are in complete and utter chaos and work through that web of chaos to get to some kind of normal functioning level," said Ravazza. "Sometimes it takes one year, three years or 10 years. It depends on how much neglect or mismanagement there was."

Ravazza is a portfolio manager for Homeowners Management Company and earlier this year she was honored with an innovator award, along with Jeff Leinen (see story on page 12).

Ravazza helped turn around an association that was plagued with drugs, homelessness, vandalism, severe deferred maintenance and was dealing with embezzlement in excess of \$500,000 from prior management. Among the solutions she was able to put into place were a landscape enhancement project, a major asphalt project, a parking enforcement program, LED conversion, new governing documents, specialized education and training programs for the board of directors, and increasing the association's reserve allocation.

Her work has transformed the community from fearful and cautious to safe and comfortable.

“*The biggest thing is being honest and transparent. I have no problem saying I don't have the answer to that question, I'll look it up and get back to you.*”

"I have eight communities and they all have different crisis," she said. "The biggest thing is being honest and transparent with them. I have no problem saying I don't have the answer to that question, I'll look it up and get back to you. With my company's work environment, support from every team member, being coached by leaders and passion for what we do that I am even able to grow and have the opportunities to be innovative," she added.

BY LORI STORM, CAMEX, CCAM

PLANNING FOR THE FUTURE

DOES YOUR COMMUNITY HAVE THE FUNDING TO FIX ITS AGING INFRASTRUCTURE?

A STEP BY STEP GUIDE ON RESERVES AND PREPARING FOR EXPENSES OF COMMUNITY UPKEEP.

Homeowners

Associations have been in existence since the mid-1900s, but they really took off around the 1970s. In the early years, there was little oversight in how each community was run. It wasn't until the Davis-Stirling Act in 1985 that universal regulations and laws were put into place that governed all associations. Homeowners associations were run by volunteers with very differing levels of interest or responsibility. Some associations were governed by keeping assessments low at any cost or with an understanding by the original members that any needs would be met with a special assessment. Time goes by and the original intent of boards are lost.

In a perfect world, HOAs would have the funds they need when they need them, but we live in a world that is far from perfect. In our world, aging infrastructure meets decades of underfunding and disintegration of unseen systems. HOAs that are 30 to 50 years old are rushing headlong into troubles they are unprepared for, but it is still their obligation to protect and enhance their

communities.

Now is the time to start having serious talks with boards regarding the need for a three to 10-year plan for taking care of items that have surpassed their life expectancy or soon will.

GATHER INFORMATION

First, you should have a serious talk with your reserve study specialist regarding those items that should be added to reserve studies. It may be time to add a dollar amount for those items that cannot be seen:

- Water delivery systems that may be corroded
- Electrical wiring and panels that have outlived their expected lives
- Sewer systems that may be compromised by mature tree roots

Even if the actual cost of replacement is not clear, an educated estimate should be included in the reserve study.

Next, you need to bring in a construction expert. Have a scope of work built for siding and roofing replacement. These folks will understand best the cost and availability of labor and the trends in the cost of materials. These experts will know what new materials are on the market and what the durability and cost of construction for these will be.

Construction experts will also be able to predict the amount of structural repairs that may be needed once the exterior covering of a building is removed. Their experience will help them guide you in potential costs based on the original materials used, the quality of original construction and other factors that can affect the overall cost of repairs and replacements.

PUT TOGETHER AN APPROACH

Now you can sit down again with your reserve study specialist and have them build a case study of what your anticipated costs will be and when repairs might be needed. Your specialist will include all other known repairs and replacements for your community over the next decade and provide you with a plan. Ask your specialist to provide you with multiple scenarios: spreading all costs over 10 years, over 5 years, and what it would look like if you had all the needed funds upfront and could do all the work immediately.

This information will help the board envision different ways to look at the issues and

imagine different approaches to taking care of their obligations to maintain and protect the corporation's assets. In the best case, the board would find that without an unexpected increase in funding the community can meet all anticipated obligations. The board has done their due diligence and can carry on in the manner they have done previously.

If, however, the board finds that more work needs to be done than what the anticipated funding will provide, it is time to move on to the next step. The board should take this information they have gathered and bring it to the community in a townhall setting. It is never too early to communicate with the owners regarding findings. No one wants to be surprised about unexpected costs.

At this meeting the board would talk about the steps they took to gather information, the ways in which they considered covering costs and the results they received from this work. Members of the community may have alternate suggestions for looking at the issues that have merit to investigate. This is exactly when the board would want this information. If further investigation is warranted, now is the time to take it on.

FIDUCIARY DUTY

Now we need to talk about one of the most important aspects of the board's responsibilities—fiduciary duty. This is the highest responsibility someone can have. The board has a responsibility to care for the assets of the corporation, and the board may need to remind the members of that as well as keeping that front and foremost when they make decisions. You will hear from members as you discuss various ways any potential funding shortfall can be handled, "But I can't afford a special assessment," or "But I am on a fixed income." These can derail boards from taking actions that are prudent and responsible, but it is unwise to do so.

Although members may be thinking emotionally at this point, it is vital that the board continue on the path that is responsible for the corporation. Once a member is over the initial surprise at the need for additional funding, sources of money may start to be imagined. For individual members there could be savings that could be used, a homeowner line of equity that could be tapped or family that may be able to loan them money.

The board must remember, though, that these funds are needed to maintain the property and property values for the association. It may be possible that some folks just cannot afford to live in the community any longer. A homeowner outside an HOA may be forced to downsize when property taxes, needed repairs or living costs exceed their ability to remain in their existing home. It is no different for a homeowner inside an HOA. The only difference is that the people making the decision are right in front of the owner and accessible.

continued on page 28

BANKERS AND ATTORNEYS

Here is where the next set of experts get involved. The next call will be to the association's attorney. She will be able to advise the board of the options for funding that the association can utilize. She will look over the documents and determine what would be necessary for special assessments or if a loan is an option. Once these options are outlined and the board understands what is necessary to undertake each of these possibilities, it is time to contact a trusted banker.

Your banker can assist the board in looking at the potential for a loan and payback options as well as determining the financial health of the corporation and whether a loan is feasible. One reason a loan may be a good choice is that all the funds for needed projects can be accessed at once so the work can be scheduled more quickly. There may be loan products that allow associations to draw only the funds for payments to vendors as needed so that interest does not accrue on the entire amount at once.

BACK TO THE MEMBERSHIP

Now you and the board have gathered expert information in all areas of the association's needs. It is time to go back to the membership for another townhall meeting. Bring all the association's subject matter experts to this meeting so that they

can each field questions related to all the possible approaches to meeting the funding needs for the community. Members who are emotional about what is going on can ask the proper expert for information and clarification on what needs to be done and when.

This approach will help members realize that much investigation and thought went into the board's process in how to tackle what must be done. While they may not be pleased with the conclusion that the board reaches, they will at least understand that the board was serious in its methodology.

It is only by including a wide range of experts who have tackled these types of issues many times that a board can have assurance that they have done the very best for the community and worked to uphold their responsibilities in caring for the assets of the community and the property values of its members.

*Lori R. Storm, CAMEX, CCAM,
is Division Vice President of
Client Development at The
Management Trust.*



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It is with great pride that we recognize managers who have taken the next step in their professional career by pursuing advanced educational opportunities. Congratulations to our newest Certified Community Association Manager (CCAM), Community Association Financial Management (CAFM), Specialty Certificate recipients and the Master of Community Association Management recipients for the second and third quarter of 2019! We also want to congratulate Menas Realty Company on achieving the Accredited Community Management Company (ACMC) designation.

NEW CCAMS

Kate Alexander, CCAM
Michelle Anderson, CCAM
Patrick Anderson, CCAM
Kim Angell, CCAM
Gina Anine, CCAM
Martha Barragan, CCAM
David Bouchard, CCAM
Mark Bronson, CCAM
Kristal Bybee, CCAM
Alexandria Chavez, CCAM
Trisha Clingenpeel, CCAM
Liane Cunningham, CCAM
Victoria DeFreitas, CCAM
Alicia DePalma, CCAM
Laurel Dial, CCAM
Francesca Disbrow, CCAM
Katherine Drobny, CCAM
Kaitlin Dunann, CCAM
Denice Duncan, CCAM
Carol Elbert, CCAM
Alejandra Esteves, CCAM
Ryan Figley, CCAM
Carol Franchi, CCAM, CAFM
Cherie Fuller, CCAM
Jerri Gaddis, CCAM
Adelita Gomez, CCAM
Allison Gudenkauf, CCAM
Brittany Harmon, CCAM
Katie Harnish, CCAM
Kathleen Harrigan, CCAM
Todd Thomas Haukom, CCAM
Kyle Hawkins, CCAM
Chelsea Hein, CCAM
Kimberly Hogan, CCAM
Dominique Hunter, CCAM
Jennifer Huntoon, CCAM
Cindy Ihrig, CCAM
Cheryl Laughrey, CCAM
Trisha Lawrence Garite, CCAM

Gloria Lee, CCAM
Phyllis Loer, CCAM
Dagmara Macierzanka-Rung, CCAM
Molly Malloy, CCAM
Amy McIntyre, CCAM
Suzanne McNay, CCAM
Linda Merkle, CCAM
Susan Miller, CCAM
Nicole Miranda, CCAM
Michelle Monahan, CCAM
Veronica Montemayor, CCAM
Sashi Narasimhan, CCAM
David Oleson, CCAM
Jamey Perelli, CCAM
Andrew Petersen, CCAM
Daniel Pizano, CCAM
Lucile Pollett, CCAM
Kazell Pugh, CCAM
Dana Rademaker, CCAM
Lauren Richardson, CCAM
Priscilla Ruiz, CCAM
Julie Russo, CCAM
Ashika Sahdeo, CCAM
Sandra Santiago, CCAM
Debi Schwartz, CCAM
Kelly Shaw, CCAM
Timothy Souza, CCAM
Daniel Spryszynski, CCAM
Amber Thompson, CCAM
Richard Thompson, CCAM
Tyra Vickers-Kearney, CCAM
Lauren Waite, CCAM
Christian Walton, CCAM
Yolanda Warshaw, CCAM
Jennifer Weaver, CCAM
Emmalou Williamson, CCAM

NEW CAFMS

Emma Eckroth, CCAM, CAFM
Christie Forbes, CAFM

Carol Franchi, CCAM, CAFM
Jacob Gonzalez, CCAM, CAFM
Carlos Melgar, CAFM
Kaley Mobraaten, CCAM, CAFM
Michael Morris, CCAM, CAFM
Fred Scaglione, CAFM
Vicky Weller, CAFM

NEW MCAM

Hamlet Vazquez, MCAM-HR

SPECIALTY CERTIFICATES

LARGE SCALE COMMUNITY MANAGEMENT

Cynthia Doane, CCAM-LS
Loni Peterson, CCAM-LS

NEW DEVELOPMENT COMMUNITY MANAGEMENT

Annett Wagner, CCAM-HR.IND

ADJUNCT DESIGNATIONS

ACTIVE ADULT

Linda Mootry, CAMEx, MCAM-ND.AA
Phyllis Harkins, CAMEx, CCAM-LS.AA
Carl Weise, CAMEX, CCAM-HR.AA

CID

Evan Benjaminson, CCAM-PM.CI
Carolyn Donaway, CAMEx, CCAM-PM.CI
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ACMC

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in the board room



TO RUN A SUCCESSFUL COMMUNITY

By Clint McClure, CAMEx, CCAM

Congratulations, you have been recently elected or re-elected to the board and you will bring your experience and passion to the leadership of the association. You are now a board member serving a corporation designed to care for your association. You will need to work well with your fellow directors and the professionals that support the association.

Being elected or re-elected to the board is just the beginning. You and your board need to ensure your goals for the association are focused around the best intent of the association and the community. It goes without saying, you are not one of the board members who wanted to be on the board to have the tree removed in the common area to open up your ocean view.

Ninety-five percent of all board members that serve on the board have the time to commit to the job and are well-intended volunteers that just want to help the community and protect their investment. How do you perform your job well as a volunteer director? Understand the role of a board member and work with your board to think strategically to run a successful organization. The HOW you help your HOA as a board member and as a board makes a big impact on the success or failure of the community.

A few simple questions to ask yourself. You need to understand “WHO” a board director is before you can discuss the “HOW”.

1. Do you fully understand your role as a director and the requirements?
2. Have you read your association's governing documents and contracts in place?
3. Have you taken the time to understand the long-term plan in place for your community?
4. Don't have a long-term plan in place for your community? Then when will you and your board set time aside to develop one. The plan needs to be developed around the needs of the overall community and not just address complaints received.
5. Do you understand your association's reserves, the current study and the data contained in the financial statements and budget?

If any of your (WHO) answers to the questions above were no, then that is your homework to get done before you can move onto the “HOW”.

How will you as a board and a board member best help your

association? Think strategically and identify the issues that need board time to resolve. Keep items off the board's agenda that should not take the board's time and keep items on your agenda that do require the board's time. The association's bandwidth for operating is also defined by laws, state and federal. Your board needs to spend time on policies that address the issues for the entire association. Those policies are helpful to your management team, so they are able to quickly react and address the day to day needs of the community within the direction of the association. If you are unsure of an area that needs the board's help, ask your manager for guidance and listen to him or her. Managers are great sources of information to help the board fine tune the policies needed or to revamp an existing one.

Serving on a board you may have heard complaints about a particular issue in the association. Take those complaints as clues. Ensure the source of the valid complaints are addressed and action is taken to resolve the core issue. If you need an example of an item, have the board ask your manager to discuss the input causing the complaints rather than the personality of the complainer. When the board is able to focus its efforts on solving the big problems facing the association that in turn helps address the complaints you might hear serving on your board.

Let's tackle the 100-pound gorilla in the room. The board must appreciate the efficacy needed for management to perform its operations and day to day needs. Your board needs to be aware of the time demands on management and ensure they complement the performance by not micro-managing your manager.

BOARD MEMBERS: It feels good to solve

the little problems that come up day to day in your association. It gives you a sense of accomplishment. But that is your manager's job, and your association pays them to do that job. If you are the board member taking action on tasks and items that are your manager's responsibility, you may be interfering with your manager and you are not focused on solving the larger problems your manager needs the board to focus on.

FOR THE ASSOCIATIONS THAT HAVE ONSITE MANAGEMENT: Are you or your fellow board members in the office too much and giving your manager items to do outside of the board meeting? Are you setting fair expectations for your management team and allowing the time and space to get it done? It is important to become involved the right way.

If you need an example, have an open and honest conversation with your manager and you will find some great clues to help improve your board. It may be a short tune-up conversation or a detailed talk that allows the board to gain some insight. Your manager may have asked you to read this article to have a conversation about this very topic.

YOUR MANAGERS ARE EXPERTS IN MANAGING YOUR COMMUNITY AND THEY WILL PROVIDE YOU GREAT ADVICE AND CONNECT YOU WITH EXPERTS TO HELP YOU EVALUATE HOW TO HELP YOUR ASSOCIATION THINK STRATEGICALLY.

There is another 100-pound gorilla, and it deals with the correct way to measure your success. Have your board take time routinely to conduct its own performance assessment, and make it a habit. The board deciding not to raise assessments is not a strict measure for success regardless

of what you may think. The reason to fund the assessments at the rate that is needed is the measure of success. For example, if your association took the time to rebuild the community lake system and the return on the investment resulted in reduced operating costs that means you can adjust your assessments accordingly. And that is a success.

Areas to focus on include:

1. Accomplishments of the goals laid out for the year.
2. Have you reacted to any changes needed in the community and how easy was it to implement them?
3. How successful has the board been in recruiting new members in your committees and new members to your board?
4. Have you taken the time to communicate the community's successes to the membership?
5. After the board set a priority goal and timeline, did the board meet their objectives?

Your board makes the hard decisions and often not popular ones in today's online instant feedback. Ensure the board is measuring the community's success the right way. That means being focused on the goals, measuring the plan and then communicating the successes to the membership.



Clint McClure, CAMEX, CCAM is President and CEO of MMI – Innovate Community Management.

TECH TALK

INNOVATIVE WAYS TO
STREAMLINE TASKS AND
COMMUNICATION.

BY SARAH TOUCHI

Americans today are connected to the internet. Studies show 96% of the U.S. population have a smartphone or mobile device. However, most HOA management companies are not using this powerful tool as a personal assistant to their professional lives. In a world where Alexa can tell us the weather and Siri can tell you a joke, it's time to use technology to manage our communities and professional lives.

SUCCESS IS IN SOFTWARE

You cannot manage a community's financials or violations without a software to help you. If you are using a software that is not made for the community management industry, it's time to look around. There are several software companies that specialize in the HOA industry and whose offerings are designed to help manage your community. The goal is to have a tool where you are managing both financial and management tasks within one complete package.

Most California companies are using an HOA-specific software. However, it may be time to reach out to the software maker to ensure you are taking full advantage of what you pay for. Many software companies provide an overview of new features. Starting with your current software will also ease the burden of making a large change. You may be paying for a product that can be upgraded to avoid spending a lot of extra money and time.

If you are currently using an HOA software, reach out to a representative about their mobile application. Most HOA management software offer an application to manage your community. The application should include the ability to manage violations and work orders. Dedicating an inspector for compliance issues and work orders has been trending throughout management companies to allow managers to focus on client relationships, board meetings and large reserve projects.

A team dedicated to compliance can use the mobile application to work remotely and become experts in the field. Using a mobile application is a useful tool for managers as well. The process to send a violation can be staged in the field and can include pictures as well as notes. All smart phones provide speech to text capability which can be used with mobile applications to enter in the violation and take notes while on an inspection. Managers will no longer need to take handwritten notes or send themselves emails with the information they need to add in the software.

INVEST IN INTEGRATIONS

If you want to add even more technology, look to third-party integrations to fill any gaps or add value. The industry has several third-party companies to partner with. They range from printing, escrow, accounts payable, vendor maintenance, websites and payment processing. You can find these companies by asking your software company to provide a list of companies they integrate with.

Integrate your company website with a chat feature so homeowners can quickly get answers. While this may need a dedicated customer support team member to manage, it will provide your management and accounting staff with the ability to work on other items. It is also providing another avenue for communication that is not widely used in this industry.

Lastly, invest in an online meeting software that integrates with Outlook.

Board meetings can be held online. Some management companies are even making this a requirement in their contracts. Team members don't need to commute to a destination which saves management companies money and saves managers time.

BECOME TRANSPARENT

A hard but valuable decision to make in this industry is to become transparent with your homeowners and board members. This can be done by posting violations, work orders, architectural and accounting items online. By keeping residents connected in a manner that is easy to read and available, it should lower calls. Managers have started to make a live action list available for their board members and posting it to an online portal. This eliminates the need for board members to follow up with management to find out the status. Having a dedicated online portal for board members provides the transparency they need to make decisions faster in a board meeting.

GO PAPERLESS

We see the notices on websites encouraging homeowners to sign up for

e-communication. This idea has been around for years and California Civil Code has started to catch up allowing us to email annual mailers to homeowners (Civil Code §4040. Providing Notice or Delivery to Individuals.)

However, this can be expanded to not only the homeowners but the board members by delivering board packets and financial statements electronically. Information can be posted to a portal where board members can keep track of decisions, take notes and research previous documentation.

A trend we see in the community management industry is requiring homeowners to sign up for ACH or online payments. While California may not be quite there yet, it is a way to avoid processing paper checks. Using software and integrations, management companies may be eliminating paper checks and correspondence entirely in the next few years.

ROI TAKES TIME

Technology is a powerful tool and can be used to help manage communities, but

comes at a cost. Create a plan to budget these expenses as well as a cost analysis. If you are moving to a mobile application, what will this cost team members to use or will technology be provided to them? Include these additional costs such as data and devices into your budget.

When improving efficiencies, it is hard to see how much this will save employees in the beginning. Don't expect results overnight. Management will need time to get up to speed to use these new features. Check back in a year to confirm the time and money saved. Continue to check on the technology within the industry. We are constantly growing and the best way to research technology is by attending a CACM conference or visiting their industry partners web page.



*Sarah Touchi
is COO of
Genevation, Inc.
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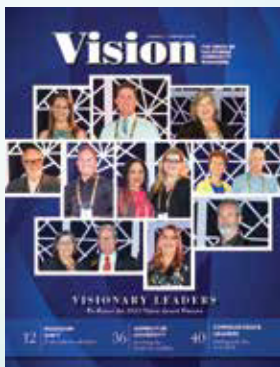
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What To Look Forward To In

2020



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In 2020, members will receive two printed issues and two digital-only issues via mail and email: spring, summer, fall and winter. More content. More helpful tips. More information. All delivered to your mailbox or inbox.



THE LAW JOURNAL WILL GO COMPLETELY DIGITAL!

That means you will receive the four issues of this legally focused newsletter in your inbox only. It will be distributed electronically, but will have expanded distribution. Now ALL members will receive the Law Journal, not just one main contact per company. Everyone will have the opportunity to read the informative articles dealing with recent laws and statutes.

WANT TO CONTRIBUTE AN ARTICLE TO VISION MAGAZINE?

Submit your content at CACM.org/news/editorial-submissions/

New Individual Manager & Management Company Members

CACM members further their success in the industry and benefit by partnering with colleagues to share new ideas and best practices. Please join us in welcoming these members from the second and third quarters of 2019!

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Arianna Romero

MANAGER PRO

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Teri Avakian
Kenny Bae
Jacqueline Beasley
Karen Bennett
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Each member of CACM plays a key role in ensuring our industry is filled with knowledgeable and professional service providers. We thank you for recognizing the value of CACM and the important role it plays in elevating your profile within the industry. You are a change agent for the HOAs you serve!

Together, we are making a difference in the lives of 15 million California homeowners. Now that's something to be proud of!



NEW

DEVELOPMENTS LEAD THE WAY

How can your community integrate innovative ideas from new developments? Here's what to be aware of as you help your association decide how to modernize and meet local regulations.

By Andrew Hay, CAMEx, CCAM-ND.PM

New developments are at the forefront of innovative ideas in Homeowners Associations throughout California. Some of the innovation comes out of necessity in order to meet state, county, or city requirements and regulations and others come out of the developers' desire to differentiate their community from other new developments and existing communities.

Here are some examples of the ideas being implemented in new developments and how this could impact or help you in managing your associations.

EFFICIENCY AND ENVIRONMENTAL IMPACT **EV charging stations.**



As of November of 2018 California had cumulative sales of over 500,000 plug-in cars. Even with the introduction of hybrid vehicles, the demand for plug-in vehicles is on the rise. Many developers in California now offer EV charging stations as add-ons during the sales process but even if owners

don't opt for this option, we are still seeing that the infrastructure for EV charging stations is being built into the properties so that the Association can allow owners to install EV charging stations through the architectural review process.

For managers who are involved with the developer in discussion prior to construction or DRE budget review, there is value-add to your clients if you bring up this topic so they can forward plan. For those who manage communities that were built prior to EV technology being so widely accepted, it is important for your boards to consider the impact on the building if they allow owners to install EV charging stations as it can adversely affect future projects the board wants to complete.

Solar systems.



Beginning in 2020 all new development will be required to have solar. In condominium projects there are many variables to discuss with the developer such as:

- Does it service the common area or separate interests or both?
- Who maintains it if it services a separate

interest?

- Will the company that manufactured and installed it even be in business for the full life cycle of the product?

This is not unique to new developments and no one in our industry is immune to the impacts of the consumer demand and regulatory requirements for solar installations.

Interlocking paver systems.



As an alternative to traditional asphalt and concrete, many new developments use interlocking paver systems. While their aesthetic appeal is greater, the maintenance and upkeep of these systems is quite different. Additionally, many of these systems are installed as part of the stormwater treatment measures that are now required. Managers of existing associations can also propose these as alternative options for hardscape if a board is interested in making a community more modern or is facing regulatory requirements to decrease the amount of hardscape in the community.

Wireless systems: FLS, elevators, intercom and entry systems.



Landline phone service is a thing of the past and as AT&T gets closer and closer to discontinuing service of its copper wiring it makes no sense for new construction to build systems that rely on antiquated phone lines. Of the 21 states where AT&T is the legacy phone carrier California is the only holdout in passing laws to allow AT&T to end its landline service. Reports indicate that 2020 is the target year for AT&T to pull the plug on this service and managers and management companies who are familiar with the innovative technology and systems to monitor and control these systems will have an advantage.

Splash pads in lieu of wading pools.



More and more often builders are opting to install splash pad play areas in place of a traditional wading pool. If done to scale, the maintenance on a splash pad is comparable if not less expensive than a pool and is much more efficient in its water usage.

PROBLEM SOLVING

Package locker systems.



Many apartment complexes use package locker systems to handle the large volume of deliveries in their leasing offices. Package deliveries are unsightly and

invite criminal activity to the communities we manage, and more and more new developments are looking into these systems to minimize the impact of the way consumers now purchase.

Concierge trash service.



In Milpitas, California, all new associations are responsible for collection of trash from each separate interest and then must bring the trash to a centralized compactor or compactors on site (that the HOA owns and maintains), which is then in turn picked up by the trash company. This is a relatively new concept, but it's quickly gaining momentum as cities and their trash services look to cope with the growing population. While this seems like a better alternative to community dumpsters/ trash enclosures that no one keeps clean, the cost for this service can be quite large and finding the right company equipped to handle the demands is critical.

Transportation plans.



Many new developments are required to have transportation plans established to encourage the use of public transportation. Each plan is specifically designed for a community based on the resources available in its specific area. As managers we are often asked to facilitate these plans or at the very least have some requirement to notify the membership they exist.

Property Enhancements

A vast majority of new development in California is high density housing. Even our traditional PUD communities have houses stacked five feet from each other with little

to no usable backyard space. While we used to see a charcoal barbecue next to the community tot lot or a couple picnic tables, it is becoming more and more common to see gas barbecues and fire pits to encourage a sense of community and allow for an area that the owners and residents can entertain their guests without having to keep everyone indoors.

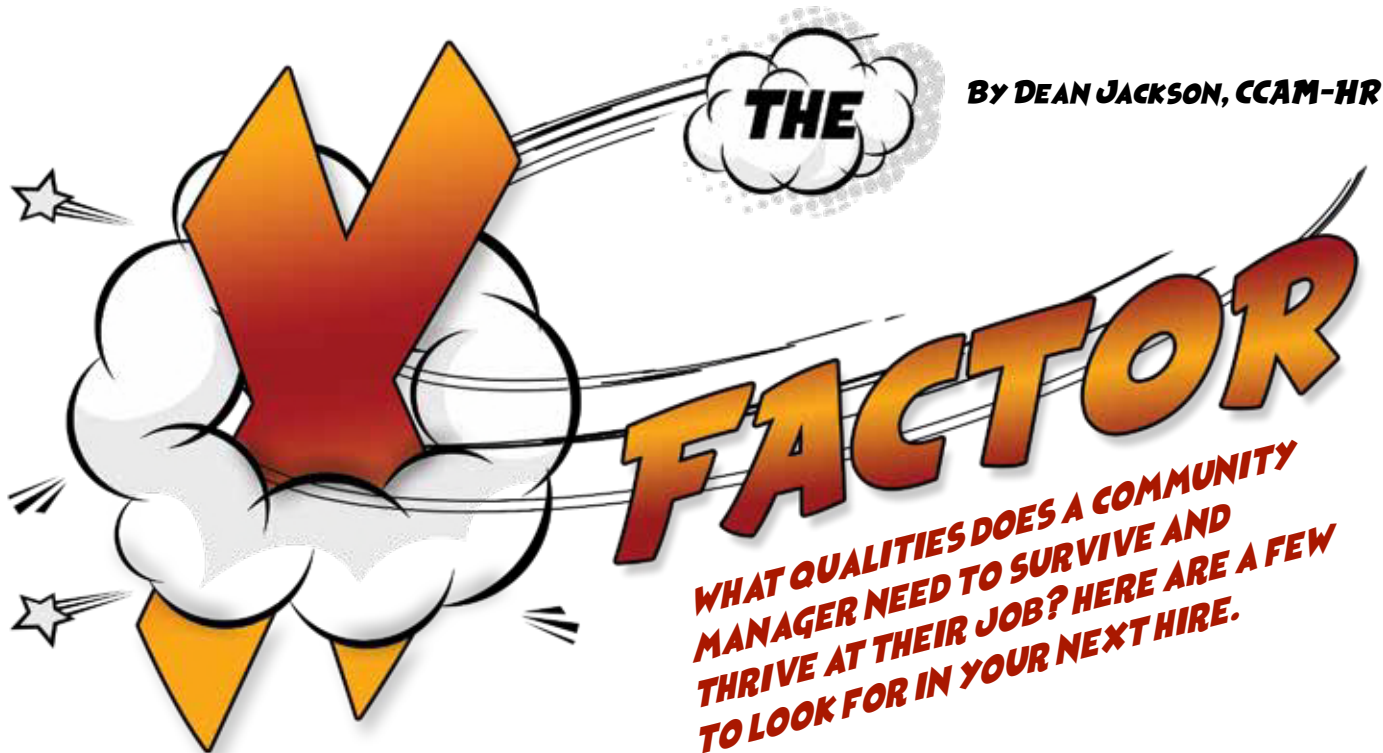


Most new developments also have community garden areas to allow those with green thumbs to fill their need to cultivate something that, depending on the size, can result in the need for committees and/or rules to be established to keep the peace.

As more and more communities have innovative elements built into them our client board of directors and community members will undoubtedly look to us for suggestions on how they can improve their community and increase the value of their homes. As managers it is important for us to be aware of these innovations both because we manage new developments and because our older communities need to find more efficient systems to replace their aging components with and to meet their own legislative requirements.



Andrew Hay, CAMEx, CCAM-ND.PM is vice president, management division of The Helsing Group, Inc.



THE

FACTOR

WHAT QUALITIES DOES A COMMUNITY MANAGER NEED TO SURVIVE AND THRIVE AT THEIR JOB? HERE ARE A FEW TO LOOK FOR IN YOUR NEXT HIRE.

By DEAN JACKSON, CCAM-HR

I've never been a big fan of reality television. Yes, I forayed into the world of American Idol once or twice (or five times, I'm a Kelly Clarkson fan), I was stranded with the folks on Survivor, and I've wanted to see who could bring the funny in America's Got Talent. Ok, my name is Dean and I'm hooked on reality TV. One show that didn't last long was "The X Factor." In this competition it was more than a vocal performance being judged, it was image, styling, that one star-making-thing that brings it all together: the X factor.

That got me thinking. Community managers can also have a variety of qualities that, when mixed in proper proportions, create that Manager X Factor. Being a master of handling the three "Ps"—people, pets and parking—is just the beginning.

To start, it takes a special kind of attitude (ne craziness) to enter this field and I haven't yet met the person whose initial goal was to pursue a career in community management. Most of us just fell into it on our path to something entirely different. My career path had me headed for stage

and screen, and while I'd been able to make a living, my stomach (and my wife) craved more than ramen noodles. I didn't know what I was getting into when I sent that fateful resume, but I imagine it was met with maniacal laughter by my future employers. I haven't looked back.

Here are some traits that I believe contribute to the Manager X Factor:

MOTIVATION

Among the common traits that I've seen in the X factor managers is motivation. For many managers who last and flourish in our industry, what may have started out as motivation to put food on the table has metamorphosed into motivation to serve, to do quality work, and to excel.

ADAPTABILITY

While pursuing acting I was also a juggler (for real). Imagine my surprise when in my new career I had to keep many balls in the air all the time. The one consistent thing about this career is that no two days are the same. One day you may get to work thinking you'll work on the budget and end up working on a multi-unit flood and the resulting insurance claims instead. A

week may start with a hectic Monday and end with a quiet Friday catching up on correspondence. The manager who can go with the flow will avoid the angst. A manager wears many hats, from financial planning to construction management, to pet psychologist. It's important to be able to multi-task and to be cool under pressure. It's an adventure each day as the juggling balls bounce and determine which hat one will wear.

STRATEGIC THINKING

The X factor manager thinks things through. If there is a problem, they will have thought through possible paths to a solution, possible next steps and have ideas to offer. They will have helped themselves even before asking for help. Even if their solutions or ideas may not be correct, they will have learned from the process.

COACHABLE

One thing I've learned in 19 years in this industry is how much I have yet to learn. A great thing about community management is that there is always a chance to be a

mentor and to have a mentor, no matter one's level of experience. While I'm fortunate to be able to assist managers with less experience, I'm grateful to those with more experience who have helped me. There are people I've encountered since day one who have provided and still provide guidance and advice, and many years later are still good friends. Seeking advice is smart. Allowing oneself to be taught is invaluable. Learning quickly is X.

POSITIVE SENSE OF SELF

It's a fact of life that managers don't frequently get positive feedback, and very often get negative feedback. If you're seeking positive affirmation I'd recommend the applause that come at an actor's curtain call rather than the lengthy email at 8 a.m. reminding the manager that "I pay your salary!" X factor managers have the ability to glean satisfaction from rendering assistance where necessary, and a sense of accomplishment from a job well done. This goes hand in hand with having a thick skin. If one isn't careful, it can be easy to be worn down by the work load, the complaints, and the lack of positive reinforcement (another good reason to have a mentor and to be one). The manager that can embrace the positives without being burnt out by the negatives often has the X factor. The funny thing is that the X factor often includes a likeability factor. These managers seem to click with others, even when positive reinforcement may be lacking.

SENSE OF HUMOR

Let's face it, this is at times a ridiculous industry. If one can't laugh at a situation or at themselves, one probably won't last. I once had to write a letter to an individual who apparently lacked both curtains and clothing. I've had to address "extra-curricular activities" in the spa and stolen poinsettias at holiday time. It's essential to be able to laugh at a situation and at oneself. As Jimmy Buffett wrote, "With all of our running and all of our cunning, if we couldn't laugh, we would all go insane."

Community management is a challenging career and a rewarding one. For the manager seeking to put down roots in this industry, X marks the spot.

Dean Jackson, CCAM-HR, is general manager of Pacific Park Plaza Homeowners Association. Thanks to Laurisa Ehlers at Harvest Landscape Enterprises Inc. for her many contributions to this article.



Since we have just learned all the qualities that make a great "X Factor" manager, the question we may find ourselves asking now is, "Just where do we find these gems ... these diamonds in the rough?" And even further, "How do we get them to come work for us once we find them?"

The answer to the second question is probably the easiest, so let's start there. The obvious answers to this question would be to offer a competitive salary, state-of-the-art technology, exciting opportunities to build a career with additional opportunities for advancement, a benefits package one could only dream of, and perks...oh, the perks! While all of these benefits are totally awesome and super enticing to include in any job offer, these aren't necessarily the best answers.

THE JOB ITSELF IS ONE THAT CAN BE TAUGHT, BUT FINDING THE RIGHT PEOPLE, THOSE WHO WILL INSTINCTIVELY AND CONSISTENTLY PERFORM AT A HIGHER LEVEL, THAT TAKES A SHARP EYE AND A KEEN SENSE AND GREATER UNDERSTANDING OF WHAT IT MEANS TO PROVIDE EXCELLENT SERVICE.

The real answer lies in the ability to first make sure your company is a place these people with "IT" would want to work. What is your company doing to stand out from the competition? What would your employees have to say about working for your organization if they were asked by a potential employee? Do you believe you have a positive reputation in the industry, and would your clients and employees give you rave reviews? If you answered no to any one of these questions, consider that to be the best place to start. Finding "X-Factor" managers is all well and good, but if you can't keep them, you really haven't solved the problem. In fact, you've likely created an increase in employee turnover resulting in an even greater problem.

So where exactly do we find these "X-Factor" Managers, you ask? Well, there are several easy and obvious answers to this question as well. There are always the usual suspects: job fairs, colleges, temp agencies, head-hunters, consultants, referrals, and so on. The problem with some, or all, of these options is

Continues on page 40

FINDING THE X-FACTOR MANAGER

Continued from page 39

that you never really know what kind of employee someone will be when they are interviewing because we tend to put on our best and most professional face when searching for employment.

Sure, there are some initial telltale signs that you probably don't want to hire someone, like extreme tardiness for example, and also some gut instincts you feel about someone during an interview that lead you to extend an immediate offer and proceed to chain them to their desk so they won't ever leave you (okay, okay, that was a little dramatic!) But at the end of the interview, how do you really know what you're getting? The best place to find X-Factor managers and those with the "IT" factor is...are you ready for it...out in your everyday life.

How do you like to be served? What do you look for in exceptional service when you're out shopping or dining or running errands? Look for those people. Keep your eyes open and always keep the qualities of "IT" employees at the forefront of your mind.

Is the receptionist at Chili's always on top of her game? Does the bartender always remember your name and drink of choice? Has the bagger at your local grocery store always gone above and beyond? Does the guy who works the deli

counter always anticipate your needs? Is the sales associate at Target personable, efficient, motivated and devoted to making sure you get everything you need during your time in the store? Talk to these people. These are the "X-Factor" folks you want working for you.

The job itself is one that can be taught, but finding the right people, those who will instinctively and consistently perform at a higher level, that takes a sharp eye and a keen sense and greater understanding of what it means to provide excellent service.

At the end of the day, there really is no secret formula or guarantee that will provide you with the ability to hire the right employee every time, but knowing what to look for and keeping a constant lookout for those types of people in your life, both inside and outside of the office, will surely go a long way in getting you there, or at the very least, getting you a lot of really great employees.



Laurisa Ehlers, CCAM, is vice president of client experience at Harvest Landscape Enterprises, Inc.



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CACM members further their success in the industry and benefit by partnering with colleagues to share new ideas and best practices. Please join us in welcoming these new members from the second and third quarter 2019!

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Community managers from across California made the trip to Newport Beach for CACM's annual High Rise and Large Scale Summits. The conference included keynotes, round table discussions, networking and guided tours to nearby high rise and large scale properties.



Photos by Doug Carraway/fotoShout





HIGH RISE & LARGE SCALE SUMMITS

Continued from page 43



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MISSION: POSSIBLE

How one onsite manager tackles crime and security issues in his community.

By Todd Greisen, CCAM



For some of us, homelessness encroaches on the very borders of our homes. HOAs are increasingly affected by California's growing population of those living on the streets, in our parks, or anywhere they can find to survive.

HUD numbers from January 2019 indicate over 130,000 Californians are homeless, estimated to be almost one fourth of the nation's total. Most of them are unsheltered, meaning there are no temporary living spaces available in their area. While our state and local governments grapple with this housing crisis, HOAs may bear some of the burden. When the homeless are on the periphery of your community, or rummaging through garbage cans in your common area, crime will go up and property values will start to go down.

Imagine a prospective home buyer driving into a community and seeing homeless camps scattered around the area. Would they be less likely to buy there? Of course!

Being homeless is not a crime. Yet crime usually surrounds the areas where they survive. In addition to increased property crimes, drug dealers find good customers among the homeless. Many struggle with addictions and are mentally unstable. Drug trafficking often escalates into gang

violence and other serious crimes. These are among the daily battles we fight here in our community.

MANAGING HOMELESSNESS AND CRIME

Solutions such as neighborhood watch, security patrols and surveillance cameras are good starting points. But if you have these resources already, are you taking full advantage of them? What actions do you take with the information you get from neighborhood watch, security reports, or video surveillance?

For example, let's start with cameras. Have they become just ornamental fixtures in your common areas? If criminals routinely get away with their activities, the deterrence of cameras is gone. If they think they can get away with it, they will. I know. I've seen drug deals take place directly underneath a camera.

Consider adding camera monitoring service in next year's budget. Typically, these services provide immediate reporting to law enforcement or private security. They have become very sophisticated, using high-tech equipment and algorithms to identify and follow suspicious activity. Also, with these algorithms, reviewing hours of video footage for evidence can be reduced to minutes.

Although I don't have time to watch cameras all day, I sometimes catch

Continues on page 46

MISSION: POSSIBLE
Continued from page 45

suspicious activity on my office monitor. This is true reality TV, but with a video game twist. A known drug dealer in the area noticed the camera lens (under my control), as it followed him walking across the street. Proof of the deterrence came when I received a not-so-friendly finger gesture toward the camera. He knows we know, and he's not been seen much around the neighborhood ever since.

In fact, that same drug dealer was also an HOA resident. Cameras helped us establish where he lived. He had moved in with his girlfriend, and was not on the lease with the condo owner. Video evidence of his criminal activity also gave me the opportunity to put pressure on the owner, under CC&Rs, to get the tenant out.

USE LOCAL AGENCIES

Working closely with code and law

“I made a connection to an emotionally charged subject I knew owners would care about—crime in the community, and its effect on property values.”

enforcement is an essential element of crime mitigation. I have working relationships with patrol officers, detectives, and all the way up to the chief of police. I often welcome investigators into my office to review video footage for criminal evidence. Law enforcement knows they have our full cooperation. They also share info with me. When criminal activity can be connected to an HOA resident, or their guests, I have support from CC&Rs and the board of directors to pursue action against the unit owner.

MODIFY CC&R ARTICLES, IF NECESSARY

If you find your CC&Rs are inadequate, get legal counsel involved in writing amendments that would strengthen your ability to mitigate criminal activity. In our case, our documents are severely outdated. To resolve this, I'm working on a complete CC&R rewrite. If you've

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ever attempted this, you know it's a task even more daunting than getting amendments passed.

Skeptical that they could get enough participation in a vote, the board didn't want to spend thousands of dollars to initiate legal counsel's rewrite. Past attempts to reach the necessary vote had failed. Really, who cares enough to vote about changes to CC&Rs? Historically, not enough in this HOA.

So here's my solution—in progress. Through a persuasive survey letter sent to the members, I made a connection to an emotionally charged subject I knew owners would care about—crime in the community, and its effect on property values. Many of our 328 condos have carports open to the homeless and criminals in the area. Because they are walled on three sides, these carports are a

great place for vandalism, loitering, vehicle break-ins, drug and sex transactions, and yes, semi-private toilets for the nearby homeless.

Because carports are so problematic and such a detriment to property values, about two-thirds of the owners have voluntarily enclosed them with garage doors, at their own expense. But under current CC&Rs, the HOA cannot require the remaining owners to install them.

This letter was written in a way to make the connection. We need new CC&Rs to force all owners to install garage doors for resident safety and property value enhancement. The letter opens with a true story of criminal activity in a carport years ago that resulted in a fatality.

The dramatic story opening is followed by the historical statistics and facts to

validate the need for this important change. It ends with a call to action: vote yes.

Seventy-five percent of the respondents agreed that we need garage doors throughout the community. As of this writing, the official balloting and vote to rewrite CC&Rs has not taken place, but with the letter's response rate, we are well on our way to this safety change.



Todd Greisen, CCAM, is general manager of Contra Loma Estates in Antioch, California.



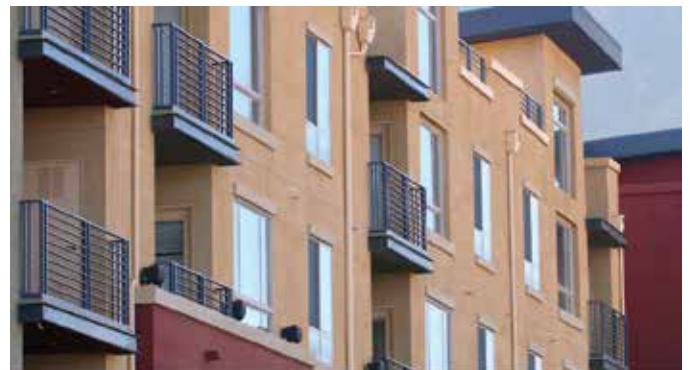
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BOARD TRAINING 101

Association boards have several options to learn about HOAs.

By Scott Swinton

curiously undertaken to train HOA boards and members themselves.

City officials in Chandler have taken it on themselves to train and empower HOA board members through what they call the Mayor's HOA Roundtable and an HOA Academy, regular educational events hosted by the city. Several years ago, realizing that management companies can only do so much, the neighborhood services division looked for a way to fill the educational void.

Stephen Erno, neighborhood services manager of Chandler, and the city of Chandler view HOAs uniquely. "HOAs are a benefit to the larger community," he said, adding that "Chandler's success is based on the HOAs' success." He is convinced that HOAs make surrounding communities better.

When it comes to training board members or homeowners, what's new or changed? And how are boards learning about California laws and how to manage their communities?

Many management companies go out of their way to offer in-house training seminars for their board members. Webinars have made those training seminars more accessible and bridge toward innovation and a tech answer, but based on the number of reported logins, this seems like a technological trial still finding its way.

Interestingly, more than one executive I talked with felt that it's unrealistic for the management company to shoulder the formal training of board members. With the high level of apathy within so many HOAs, the revolving door of board members,

and the limited time and budget allowed by hyper competitive management fees, it doesn't make sense, they claim, for management companies to be the go-to source for board education.

Many management companies do make valiant attempts through board training seminars, newsletters, and some limited consulting, while others simply outsource to other organizations. Unfortunately, few utilize these resources. It's universally agreed that a small percentage of board members ever attend.

SOME CITIES TAKE THE LEAD

In researching what else is being done to train HOA board members, I found something interesting outside of California. The civic leaders of Chandler, Arizona, a sprawling suburb southeast of Phoenix, have

Chandler, and Erno in particular, have embraced this innovative idea – that the HOA is an integral part of the community, it's not going away, and that education regarding HOA governance is key to successful community relationships. Erno clearly understands that success can only manifest if the HOA is operating in a healthy way, and can only follow if owners and board members understand the HOA paradigm. Rather than continue to field frustrating calls from owners wanting the city to uphold the CC&R's of their individual communities, Chandler came up with an educational solution.

At their Mayor's HOA Roundtable and HOA Academy, hundreds from across the city come to hear from attorneys, code enforcement officers, and industry specific professionals. Erno talks about one of the

most educational and enjoyable forums they host where homeowner attorneys face off against HOA attorneys in a Judge Judy format to hash out the issues. The purpose: Empower the community and offer the resources they need to thrive.

Though the number of attendees still isn't overwhelming, the approach is truly innovative and holds great potential.

OUTSIDE TRAINING

It makes sense that with the integral nature of the HOA to urban planning and government, civics courses in high schools, professors in local junior colleges, and even departments within the universities would begin to integrate the HOA paradigm into their curriculum and courses. But no matter who I ask or how I search it online, the sources for educating HOA members and board members continue to be nearly exclusively management companies and CACM-type institutions.

But even if classes or degrees become available, board training should not be restricted to Davis Stirling, collections and contracts. Frankly, training on the specifics of running an HOA should be secondary to teaching leadership, board dynamics, prioritization and communication skills.

Most HOA board training focuses on laws, best practices, reserve studies, collections and other HOA-specific issues. Meanwhile the board training I see offered for other non-profit entities focuses on communication, board effectiveness, intra-board dynamics, and governing with and around differing personalities.

Rather than simply learning to act as lawyers, cops and judges, if board members are trained to care and communicate, they will be more likely to read their CC&Rs, study Davis Stirling, and pursue the knowledge they need to perform their role well. Not that they won't benefit from updates on new laws and tips from vendors, but those data points will be truly secondary to their need to understand how to lead.

Well-run communities are not led by boards who have memorized the entire Davis Stirling Act, rather those with great diplomacy, integrity and communication skills.

While searching for a new method of training HOA boards, keep in mind that there is more to leading an HOA than technology, best practice and law updates. Cultivate the skills that make for personal goodness and integrity, and the specifics will naturally follow.



Scott Swinton is general contractor and consultant at Unlimited Property Services, Inc.



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MEET THE CANDIDATES FOR THE BOARD OF DIRECTORS

The election for CACM's 2020 Board of Directors will take place via electronic voting from November 12 through November 25, 2019. All active CACM manager members should receive an email on November 12 with voting information, a username and password, and a link to log onto the electronic voting system.

The Nominating Committee interviewed candidates to fill five open positions on the 2019 Board of Directors and presented their selection to the CACM Board of Directors. The new terms begin on January 1, 2020 and will be introduced to the membership at the Annual Membership Meeting on February 6, 2020 in Santa Clara, California. The following candidates have been reviewed and approved by the 2019 Board of Directors and are presented in random order for your consideration.



*Joseph Price, CAMEx, CCAM
Next Step Community Management, LLC*



*Andrew Hay, CAMEx, CCAM-ND.PM
The Helsing Group, Inc., ACMC*



*Kendrah Kay, CAMEx, CCAM
Powerstone Property Management, ACMC*



*Lori Albert, CAMEx, CCAM
Albert Management, Inc.*



*Bruce Ratliff, CAMEx, CCAM-HR.CI
Eugene Burger Management Corporation*

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December 6, 2019

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December 12, 2019

Balboa Bay Resort, Newport Beach

BENEFITING



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October 28, 2019

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Our inaugural Halloween-themed Trick or Tee Golf Tournament brought out managers and industry partners for a day of fun and comradery in Orange County. Every hole was themed and industry partners took out all of the stops with their ghouls, costumes and treats.



AWARDS



Ladies' Closest to the Pin:

Melissa Vitali, CCAM, Seabreeze Management Company, Inc.

Men's Closest To The Pin:

Mike Fitzgerald of James LeCourt Plumbing

Ladies' Longest Drive:

Felicia Semuskie, FirstService Residential

Men's Longest Drive:

Jeff Ludwig

Putting Contest:

Matt Puccio of FloodPro

1st Place with Lowest Score:

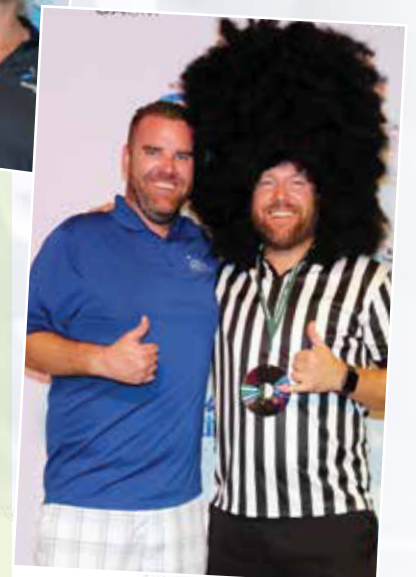
Jeff Babbitt of Harvest Landscape

Scott Babbitt of Harvest Landscape

James Castro of Anchored Construction

Josh Hodosh of

Powerstone Property Management, ACMC



Thank you

to our golf committee for their help planning and executing this event:

Chris Bonkowski, Esq., Partner, Iger Wankel & Bonkowski, LLP

Laurisa Ehlers, CCAM, Vice President, Client Experience, Harvest Landscape

Mike Fitzgerald, Business Development Director, James LeCourt Plumbing

Kendrah Kay, CAMEX, CCAM, Vice President, Management Services, Powerstone Property Management

Melissa Pease, CCAM, Senior Manager, Powerstone Property Management

Rob Quinn, CCAM, Community Association Manager, The Management Trust

Marc Roest, Account Executive, The Sherwin-Williams Company

Annie Wyland, Director of Business Development, Southern California, CM Squared



There are many ways we can protect our homeowner association communities and individual homes prior to a disaster occurring. While there are different types of disasters depending on where you live, California is mostly prone to earthquakes, floods and fires. It is important for communities to have a before, during and after emergency plan.

Savvy managers and homeowners look to long term safety plans for their community and their residents well before a disaster strikes. Communities and residents should know what steps to take when preparing for a disaster. Earthquakes usually come with no warning. Floods and fires are a little more predictable, giving residents and managers more of a warning before disaster strikes.

There are many agencies that can help along the way when preparing a disaster plan. The Federal Emergency Management Agency (FEMA) is one of the largest and well known of these agencies. FEMA can assist you with putting a disaster plan in place and ultimately help to protect homes and communities. The organization works with communities across the nation to

help homeowners not only to develop new plans and put them into practice but also to respond when disasters have struck in a community. They also work to support citizens and first responders – helping to protect against, respond to, recover from and mitigate the damages.

How else can FEMA help?

FEMA offers programs like the Community Emergency Response Team (CERT). This program promotes disaster preparedness education and informs community members about disasters that may impact the area. This may include earthquake, fire and flood education, among others. The CERT program trains participants in the event of a basic disaster, giving them the knowledge to assist with fire safety management and light search and rescue organization. With these skills a layperson would be able to assist neighbors and others in the event of a disaster.

The following are three of the most important things to consider when planning for an emergency:

COMMUNICATION STRATEGIES

How will your HOA communicate when disaster strikes? A plan should consist of where to meet and how to reach residents who are unable to make it to the designated meeting spot. Before an emergency situation, homeowners should choose a friend or out-of-state family member to reach in the event of an emergency and create contact cards for each family member. The FEMA website many other helpful ideas to ensure your plan is well laid out and effective.

EASY-TO-ACCESS DISASTER KIT

One of the most important things homeowners will need for their disaster plan is to have a disaster kit. The kit should be in one container so it is accessible and easy to grab. The kit should contain an array of items from basic items such as water, food (non-perishable), medications, flashlights, radios, blankets, cash, matches, candles and any other items they think they will need in an emergency. They should keep their list to a reasonable amount.

Remember: Homeowners don't have enough space to pack the whole house. A Kit should provide enough provisions for at least 72 hours. Since they may not be at home when a disaster occurs, it would be helpful to have a few different kits prepared. Possible locations of these kits include your work office, home or vehicle.

KNOWLEDGE OF LOCAL SHELTERS

Homeowners should also consider various other items when setting their plan. Do some of your family members require special attention? Do they have pets? If they have pets, they should make a kit for the pet – they need to survive too. Some shelters do not take animals; therefore they should plan ahead and locate a shelter that is pet friendly. They should know their options before disaster strikes.

Association managers should have a similar plan for their homeowners. How will buildings be evacuated? A plan should be set in place beforehand to ensure that homeowners and tenants are educated or informed about evacuation routes and procedures.

What if an earthquake strikes?

These same homeowners should know where to remain in a building if a disastrous event such as an earthquake occurs. Local fire and police departments, as well as the Red Cross all offer resources that aid in putting together a personal emergency preparedness program. Property managers should have listings

of insurance agents and other local agencies in an easy-to-access location.

All residents should be given pertinent emergency preparedness information upon move-in. Association managers will also want to update residents in writing, on an as-needed basis, when information changes. It may also be worth re-distributing this information annually to ensure it doesn't get lost in the shuffle as time goes on.

While we never know when a disaster will strike, being prepared is a key component to making things less stressful in the event of a disaster. For more information, visit www.fema.gov

Elaine Gower is the Director of Business Development at The Naumann Law Firm, PC, a law firm servicing Los Angeles, San Diego, Orange County, Riverside and San Bernardino counties.





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- Excessive cracking at tile flooring, garage slabs or patio areas
- Staining or dampness at underground parking garage
- Cracking or step cracking at perimeter block wall

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DATE	COURSE/EVENT	COURSE/EVENT CODE	LOCATION
NOVEMBER			
5	The Basics of Association Management Online: Module 1		Online
6	Risk Management in Community Associations	INS400	San Diego
7-8	Enhance Your Professional Presence Modules 1-2	CMM200	Online
12	The Basics of Association Management Online: Module 2		Online
13	Breakfast Forum	FRMCV	Coachella Valley
13-15	High Rise Community Management	SPC400	San Diego
14	Advanced Ethics: Leadership & Decision Making	LDR500	Bakersfield
19	Ethics Mastery	LDR550	Orange County
19	The Basics of Association Management Online: Module 3		Online
20	Advanced Ethics: Leadership & Decision Making	LDR500	Ventura
21	Reserves: What, Why, How?	FIN200	Online
26	The Basics of Association Management Online: Module 4		Online
DECEMBER			
3	The Basics of Association Management Online: Module 5		Online
4-5	California Law Series Modules 1-4	CMM121-124	San Diego
10	The Basics of Association Management Online: Module 6		Online
12	The Basics of Association Management Online: Module 7		Online
12	Holiday Party		SoCal
17	The Basics of Association Management Online: Module 8		Online
18	The Basics of Association Management Modules 1-2	CMM101-102	Orange County
2020			
JANUARY			
7-9	Commercial and Industrial CID Management Modules 1-3	SPC450	Online
9	Foundational Ethics for Community Managers	CMM130	Coachella Valley
9	Advanced Ethics: Leadership & Decision Making	LDR500	Coachella Valley
15-16	Fundamentals of Effective Governance Modules 1-2	BDA300	Online
22	Insurance Principles	INS200	Online
23	Foundational Ethics for Community Managers	CMM130	Los Angeles
23	Advanced Ethics: Leadership & Decision Making	LDR500	Los Angeles
FEBRUARY			
11-12	The Basics of Association Management Modules 1-2	CMM101-102	Coachella Valley
12-13	Strategic Financial Planning Modules 1-2	FIN320	Online
18-19	The Basics of Association Management Modules 1-2	CMM101-102	San Diego
20-21	Age Restricted Active Adult Modules 1-2	SPC420	Online
25-26	California Law Series: Modules 1-4	CMM121-124	Orange County
26-27	Effective Meetings & Election Tools Modules 1-2	BDA220	Online
MARCH			
3-4	California Law Series: Modules 1-4	CMM121	Coachella Valley
4	Reserves: What, Why, How?	FIN220	Online
11	Foundational Ethics for Community Managers	CMM130	Anaheim
11	Advanced Ethics: Leadership & Decision Making	LDR500	Anaheim
11	Ethics Mastery	LDR550	Anaheim
12-13	Southern California Law Seminar & Expo	LSSC	Anaheim
17	The Basics of Association Management Module 1	CMM101	Online
18	The Basics of Association Management Module 2	CMM101	Online
24	The Basics of Association Management Module 3	CMM101	Online
25	The Basics of Association Management Module 4	CMM101	Online
26	Risk Management in Community Associations	INS400	Orange County
31	The Basics of Association Management Module 5	CMM102	Online

DATE	COURSE/EVENT	COURSE/EVENT CODE	LOCATION
NOVEMBER			
5-6	The Basics of Association Management Modules 1-2	CMM101-102	East Bay
5	The Basics of Association Management Online: Module 1		Online
7-8	Enhance Your Professional Presence Modules 1-2	CMM200	Online
12	The Basics of Association Management Online: Module 2		Online
13	Human Resource Management	LDR400	San Francisco
15	Advanced Ethics: Leadership & Decision Making	LDR500	East Bay
19	The Basics of Association Management Online: Module 3		Online
21	Reserves: What, Why, How?	FIN200	Online
26	The Basics of Association Management Online: Module 4		Online
DECEMBER			
3	The Basics of Association Management Online: Module 5		Online
4-5	California Law Series Modules 1-4	CMM121-124	East Bay
6	Holiday Party		NorCal
10	The Basics of Association Management Online: Module 6		Online
11	Foundational Ethics for Community Managers	CMM130	East Bay
12	The Basics of Association Management Online: Module 7		Online
17	The Basics of Association Management Online: Module 8		Online
2020			
JANUARY			
7-9	Commercial and Industrial CID Management Modules 1-3	SPC450	Online
15-16	Fundamentals of Effective Governance Modules 1-2	BDA300	Online
22	Insurance Principles	INS200	Online
FEBRUARY			
5	Foundational Ethics for Community Managers	CMM130	Santa Clara
5	Advanced Ethics: Leadership & Decision Making	LDR500	Santa Clara
5	Ethics Mastery	LDR550	Santa Clara
6-7	Northern California Law Seminar & Expo	LSNC	Santa Clara
12-13	Strategic Financial Planning Modules 1-2	FIN320	Online
19-20	California Law Series: Modules 1-4	CMM121-124	Sacramento
20-21	Age Restricted Active Adult Modules 1-2	SPC420	Online
26-27	Effective Meetings & Election Tools Modules 1-2	BDA220	Online
MARCH			
4	Reserves: What, Why, How?	FIN220	Online
5-6	The Basics of Association Management Modules 1-2	CMM101	East Bay
17	The Basics of Association Management Module 1	CMM101	Online
18	The Basics of Association Management Module 2	CMM101	Online
18-20	Large Scale Community Management	SPC410	East Bay
24	The Basics of Association Management Module 3	CMM101	Online
25	The Basics of Association Management Module 4	CMM101	Online
31	The Basics of Association Management Module 5	CMM102	Online

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INTRODUCING

THE CACMSTRONG FOUNDATION

Supporting California community managers, their families, and the communities they serve through difficult situations.



CACMSTRONG

FOUNDATION

WHY?

The CACMStrong Foundation was launched in 2019 by California Association of Community Managers (CACM) in response to the needs of our members and our members client's in the aftermath of tragic events, such as the devastating fires throughout California in 2018.

The state has long had a history of fire disasters, but the 2018 wildfire season was the deadliest and most destructive on record in California. Entire neighborhoods and cities demolished into ashes. Dozens of community

managers were personally affected, losing their belongings and their homes. Many community managers also saw tremendous devastation to homeowners and to communities they serve.

The CACMStrong Foundation was created as a way to give back and support our community; to provide relief to CACM members, their families, and the clients they serve; and to help those affected by extenuating circumstances, whether that's natural disasters or other difficult challenges.

DONATIONS

CACMStrong is funded by tax-deductible donations from CACM members and concerned organizations and individuals. We administer resources based on need and the request for assistance. Our relief efforts are aimed at California residents and businesses.

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