

HOA Living MAGAZINE

COMMUNITY ASSOCIATIONS INSTITUTE | COACHELLA VALLEY CHAPTER

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UPCOMING EVENTS

18 CAI-CV's OktoberFiesta
Friday, October 25, 2024, 5:30 p.m.
Pro Landscape Nursery

23 CAI-CV Educational Lunch Program & Mini Trade Show
Friday, September 20, 2024, 11:15 a.m., Sun City Palm Desert
AGING INFRASTRUCTURE

28 CAI-CV's Sips & Shots - Wine and Tequila Tasting
Friday, December 6, 2024, 5:30 p.m., Shields Date Garden
WINTER WONDERLAND

35 CAI-CV's Annual Awards & Casino Night
Friday, January 24, 2025, 5:30 p.m., Sun City Palm Desert
MASQUERADE BALL

PAST EVENT PHOTOS & SPONSORS

14 CAI-CV Annual Bowling Tournament
Friday, July 12, 2024,
Palm Springs Lanes

24 CAI-CV's CAM Day 2024
Friday, June 7th, 5:30 p.m.,
Sun City Palm Desert



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President's Message

Julie Balbini, Esq.
Managing Attorney, CV Office,
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Happy August! I hope all of you have had a chance to take some time off or will be able to do so this month. For the Coachella Valley HOA industry, summer is about to end, and many of us are planning pre-season projects. CAI has fantastic resources to help you plan successful projects from landscape conversions to replacing asphalt and so much more. Check past issues of CAI-CV's HOA Living Magazine for articles and vendors: www.cai-cv.org/page/HOALivingMagazine.

We had two spectacular events in July. Thanks to the Bowling Committee for another wonderful tournament at Palm Springs Lanes on July 12th. Just over 150 attended. As usual, it was a fun evening with excellent food, amazing desserts, and awesome networking. See the photos on pages 15 and 16 or use the CAI-CV app to see all the event photos.

On Friday, July 26th, the Education Committee hosted the Chapter's annual CAMDAY for CAI-CV managers. More than 60 managers attended the day-long educational event this year. Thanks to all the speakers and Committee members who helped plan CAMDAY. Thanks too to our generous business partners who sponsored and participated in the trade show and other facets of the event. Please see the pictures and sponsors on pages 24 and 25.

Please mark your calendars for our next Educational Lunch Program and Mini Trade Show, on Friday, September 20, 2024, at 11:15 a.m., at Sun City Palm Desert. Guest speakers Chris Sigler, B.S.C.E., CDT (Sigler & Associates, Inc.) and Jolen Zeroski, CMCA (First Citizens Bank), will tell us all about dealing with aging infrastructure. More information can be found on page 23.

YOU CAN SIGN UP NOW FOR THE FOLLOWING UPCOMING EVENTS:



9/20/2024
CAI-CV Educational
Lunch Program &
Mini Trade Show



10/8/2024
CAI-CV & DCHC Board Member Workshop
- Requests for Proposals (RFPs), Contracts,
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10/18/2024
CAI-CV Educational
BREAKFAST Program
& Mini Trade Show



10/25/2024
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11/15/2024
CAI-CV LEGISLATIVE
UPDATE, 11:00 AM,
Sun City Palm Desert



11/22/2024
CAI-CV Fall Golf
Tournament



12/6/2024
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12/6/2024
CAI-CV's Sips &
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Tequila Tasting



1/24/2025
CAI-CV Annual
Awards &
Casino Night

Sign up for CAI-CV events and educational programs at: [Community Calendar - CAI-CV](#). Also, you can use the links in the Monday Update (emailed to all members every Monday). Please see page 36 for upcoming events and programs.

On behalf of the CAI-CV leadership team, we wish you a safe and enjoyable August and look forward to seeing you at our upcoming events! ☺

Julie

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Sunrise Racquet Club

OWNERS ASSOCIATION

By Ashley Layton, PCAM, AMS, CMCA



Get your community on the cover! Download and fill out the Community Spotlight Questionnaire and send it to alayton@brpcam.com.

Sunrise Racquet Club Owners Association is situated in the heart of Palm Springs. Located on Sunrise Way and Tachevah Drive, it's just a short distance to the airport, restaurants and endless shopping.

The Association has 196 single story condominiums with two to three bedrooms. When the units first went on sale in the mid-1970s, a long line of people formed down the street waiting for the chance to live in a tennis community. This is because tennis tournaments in the 70s and 80s were often held at local racquet clubs, and the Sunrise Racquet Club was one of those places.

Board President Les Wheeler states, "Sunrise Racquet Club has a clear sense of community. Our



owners are very active and have many social activities throughout the season. Monthly potlucks are held with regular attendance of 75 to 100 owners. This is a community where residents get to know their neighbors, and where neighbors become important friends for life."

The Association has converted several areas of turf to drought-tolerant landscaping over the past several years and is continuing the turf conversion in phases. All the irrigation heads have been changed to the most water-efficient for their purpose, and pool and lake equipment is maintained to be energy efficient. The Association has converted most of its lighting to LED.

The community recently completed the painting of all components (stucco, wood, and metal) with Flanders Painting, and Asphalt MDs has been hired

"THIS IS A COMMUNITY WHERE RESIDENTS GET TO KNOW THEIR NEIGHBORS, AND WHERE NEIGHBORS BECOME IMPORTANT FRIENDS FOR LIFE."



THE AMENITIES COVERED BY THE \$624 MONTHLY ASSESSMENT INCLUDE:

- Exterior of Homes
- Roofs
- Clubhouse
- 2 Racquetball Courts
- 7 Tennis Courts
- 6 Pools and Spas
- Lake with Gazebo
- Common Area Landscape
- Streets



to reseal the streets in the fall. Two of the six pools are scheduled for re-plastering this summer.

Association Manager, Meaghan Gaffney-Howe, CMCA, AMS, said, "Sunrise Racquet Club is a thriving community where the residents work together to make the community so special. There is never a lack of volunteers, from 'Santa's Elves' decorating for the holiday season to volunteer-led field trips to learn the history of some of Palm Springs' most famous neighborhoods. This community is truly one of a kind!"

The seven-member board of directors currently governs the property with the support of six standing committees: Architectural, Landscape, Tennis,



Pools/Spas, Lakes, and Social. Each committee is chaired by a member of the board of directors.

The association utilizes reputable CAI-CV business partners including Asphalt MD's, Conserve LandCare, Fiore, Racobs and Powers, A PLC, Flanders Painting, Roof Asset Management, Diversified Waterscapes, LaBarre/Oksnee Insurance, Banc of California, Alliance Association Bank, and Pacific Premier Bank.

Sunrise Racquet Club Owners Association is managed by Meaghan Gaffney-Howe CMCA, AMS, Community Manager with The Gaffney Group, Inc. Meaghan can be reached at 760-327-0301 or via email at meaghan@thegaffneygroup.net. 



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- Palm Valley Country Club, Palm Desert
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- Sun City Palm Desert
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Request an application
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(Application includes a questionnaire designed to evaluate an HOA's best practices in all operational areas. The application is reviewed by CAI-CV Homeowner Leaders who either award Medallion status or provide feedback on areas needing improvement. The first-time application fee for CAI-CV members is \$300 with a 2-year renewal fee of \$200. Contact CAI-CV (760) 341-0559 or email clockett@caicv.org for more information.)



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Insurance, Assessments, and Your Association Budget

By John Schuknecht, CMCA, AMS

Budget season is just around the corner and the insurance market continues to harden nationwide. Which leads all HOA board members and property managers to the same question: "How much do we need to budget for insurance?" In a recent article published by Corey Alison, ARM, EVP & National Real Estate Practice Leader-Casualty for Amwins, Corey states: "Most risks can expect double-digit renewal increases. Even for clean accounts, 10% to 20% increases are common, with 30% not unheard of. Distressed accounts or those that have been nonrenewed could see even steeper increases."

It is important to understand what is driving premiums in order to explain the increase to your board and HOA members. Below are the key contributors to these rising costs:

1. Catastrophic Losses

Major disasters such as hurricanes, floods, wildfires, tornadoes, and winter storms have caused insured losses of over \$100 billion globally in five out of the last six years. In 2022, the total insured losses were estimated at \$140 billion, which continues to strain the industry.

2. Reinsurance

Catastrophic events are increasing the cost of reinsurance, which primary carriers must pass on to their customers. Meanwhile, the inflation and economic environment have made reinsurers more selective. The gap between reinsurance supply and demand has tripled from the previous fall to \$60 billion in early 2023.

3. Insuring to Value

Despite rising inflation, only 43% of insureds have increased their policy limits to accurately reflect the current replacement cost of insured property. Associations must accurately value their assets to avoid underinsurance penalties; higher property replacement costs mean higher premiums.

"MOST RISKS CAN EXPECT DOUBLE-DIGIT RENEWAL INCREASES. EVEN FOR CLEAN ACCOUNTS, 10% TO 20% INCREASES ARE COMMON, WITH 30% NOT UNHEARD OF."

4. Construction Materials Costs

Construction costs have increased dramatically over the past three years, with non-residential and multifamily residential up by 36% and 32%, respectively. Shortages of materials and supply chain disruptions continue to affect contractors. These costs impact the replacement cost of damaged property.

5. Skilled Labor Shortage

Wages and salaries account for nearly half of reconstruction costs, with a 16% increase over the past three years. However, finding skilled labor has become a challenge for nine out of ten contractors, resulting in project delays and increased business interruption losses.

6. Property Rate Need

Rising loss trends, primarily due to catastrophes, severe weather, and large fires, have outpaced rate increases in the past. Carriers are expected to raise rates again this year to bridge the gap. 



John Schuknecht, CMCA, AMS is an Account Representative at LaBarre/Oksnee. John can be reached at 657-207-4789 or JohnS@hoa-insurance.com

The Importance of a Solid Reserve Study

Reviewing, Enhancing and Following Your Reserve Study for the Health of Your Association's Finances!

By Chris Sigler, B.S.C.E., C.D.T.



Reserve studies are not just another annual disclosure and not just another set of numbers in your annual budgets. They are a particularly important tool that should be used to maintain the overall health of your community and its financial condition.

While not every year requires an on-site review, think of it as like getting an “annual physical” or exam with your doctor or dentist. Even though some of us put off going to our medical or dental professional annually, we all understand the importance of getting a checkup every year. Consider a reserve study update to be like an exercise in checking vitals, doing bloodwork, having the doctor listen to your lungs and heart. It’s important to do, no matter how tedious or unfriendly it might feel.

A solid and serious review of your reserve study is an important checklist to follow for the physical and financial health of your community and its level of funding.

WHAT ARE THE KEYS TO HAVING AND IMPLEMENTING A SOLID RESERVE STUDY TO PROPERLY PLAN FOR THE FUTURE?

Find and hire an experienced and collaborative reserve analyst. Do not shortchange the cost of a good study.

The many moving parts in the facilities, components and systems require fair compensation for your analyst based on the task at hand and the complications in your community. When considering who to hire as your reserve analyst, don’t make the cost of the service the sole deciding factor.

Work with the reserve analyst to inventory your community's key and vital components and systems.

Get to know and understand your community and all its components as a volunteer. Take site walks either with your members, with the reserve analyst and/or active committee members. Look at the list of components in your study, and suggest additions, clarifications, and breakdowns if you feel as though it is not covering all the necessary bases.

Participate in the reserve study to the extent that is helpful to the analyst and answers your questions.

Without micro-managing your reserve analyst, ask questions and suggest additions, deletions, or added detail, using the prior year’s expenses or observations as a basis for your queries.

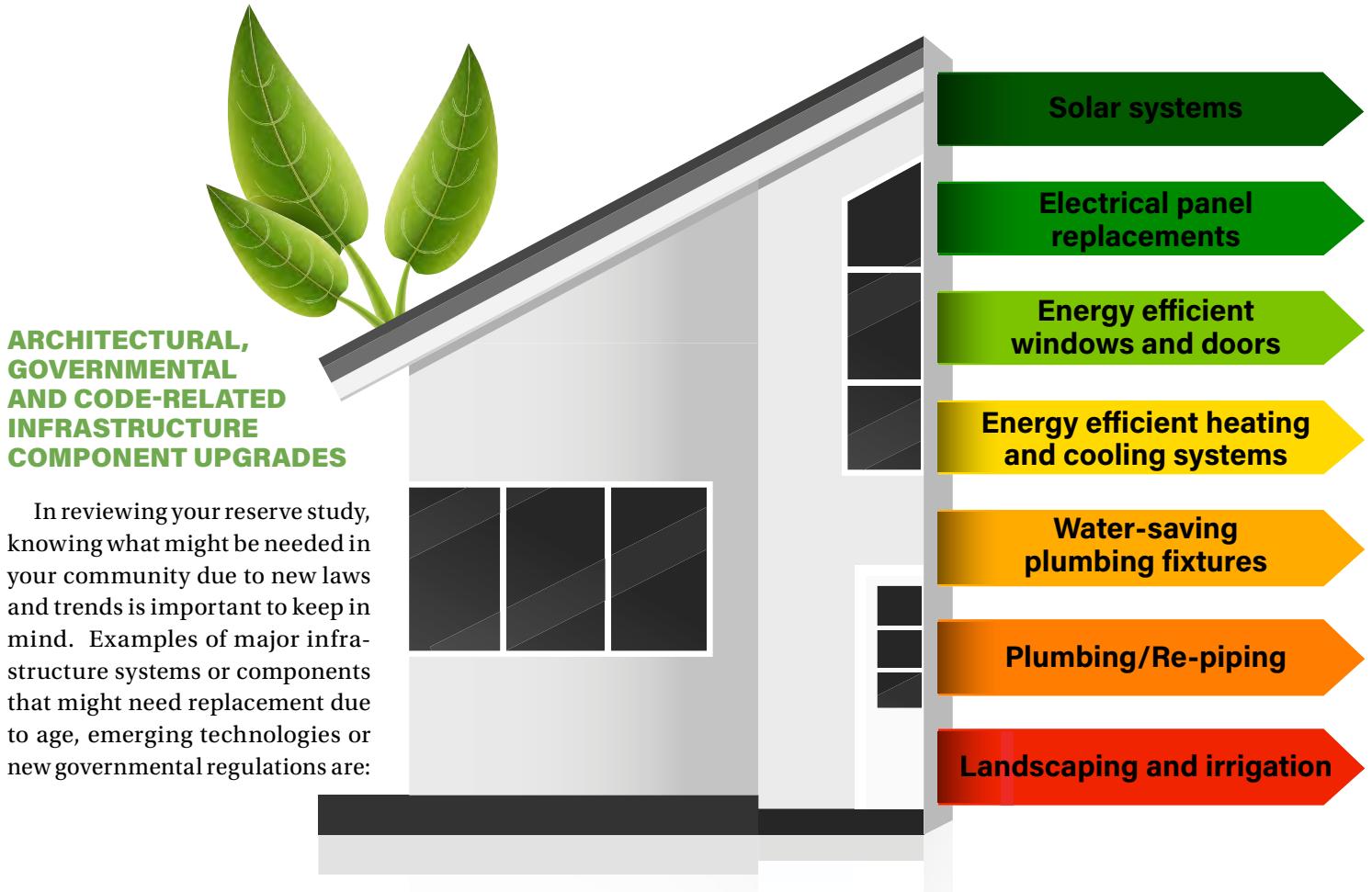
Stay informed and educated regarding trends and laws that could affect your association.

Read periodicals, newsletters, and industry publications to stay informed of upcoming trends. Attend industry educational events and seminars. For example, the current “functional turf” laws and other water-saving measures may be considered for future implementation.

“Look at the list of components in your study, and suggest additions, clarifications, and breakdowns if you feel as though it is not covering all the necessary bases.”

Call upon your most trusted business partners and service providers when needed and necessary.

In some cases, the projected costs of upgrade, repair or replacement might be best confirmed by one of your industry business partners. By maintaining good relationships with service providers, contractors, vendors, and suppliers in your community, you can verify key components’ costs with them for accuracy.



"The challenge of funding these upgrades is that they were most likely not planned or reserved for. Just like a good retirement plan, it is vital that an association plans for the inevitabilities of retired or aging components, new laws and regulations, and other ongoing needs. To keep the financial health of the association in good standing, it is necessary to prepare for these important needs."

The challenge of funding these upgrades is that they were most likely not planned or reserved for. Just like a good retirement plan, it is vital that an association plans for the inevitabilities of retired or aging components, new laws and regulations, and other ongoing needs. To keep the financial health of the association in good standing, it is necessary to prepare for these important needs.

No matter how challenging this aging process may be, a thoughtful and forward-thinking approach to the annual review of your reserve study can be key in preparing for these inevitable financial needs. Participating in, reviewing, modifying, and keeping up with your reserves through an accurate reserve study is an important aspect of not being caught flat-footed financially. Maintaining aging infrastructures can be extremely rewarding if carried out professionally, with the help and counsel of appropriate reserve analysts, experts, and business partners. ☺



Chris Sigler is the President and Owner of C.L. Sigler & Associates, Inc., a Construction Management and Consulting firm that has exclusively served the HOA industry for 22 years. He is a Civil Engineer by trade with more than 30 years of Engineering and Construction experience and is actively involved in SB 326 inspections throughout the Coachella Valley. Chris is certified with the Construction Specifications Institute (CSI) as a Construction Documents Technologist. Located in Palm Desert, his firm serves the Coachella Valley and Riverside County, while serving the San Francisco Bay Area in Northern California from their San Jose Corporate office. Chris can be reached at 408-210-8003 or by email at chris@siglercm.com www.siglercm.com

CAI New Reserve Study Best Practices

CAI's updated reserve study standards urge communities to incorporate preventive maintenance and structural inspections into budget planning tools.

The 2023 Reserve Study Standards provide guidance and methodology in the preparation of reserve studies for all varieties of community association ownership types and physical configurations. Learn how to build a safe and successful future for your community.



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Aging Communities - Aging Residents

Do your residents want to stay put, and age gracefully in their homes? If so, check out this great book from CAI Press:

A Place to Age The Retirement Generation in Community Associations

ISBN: 978-0-59618-075-8

2014, 44 pages

Author(s): Ellen Hirsch de Haan

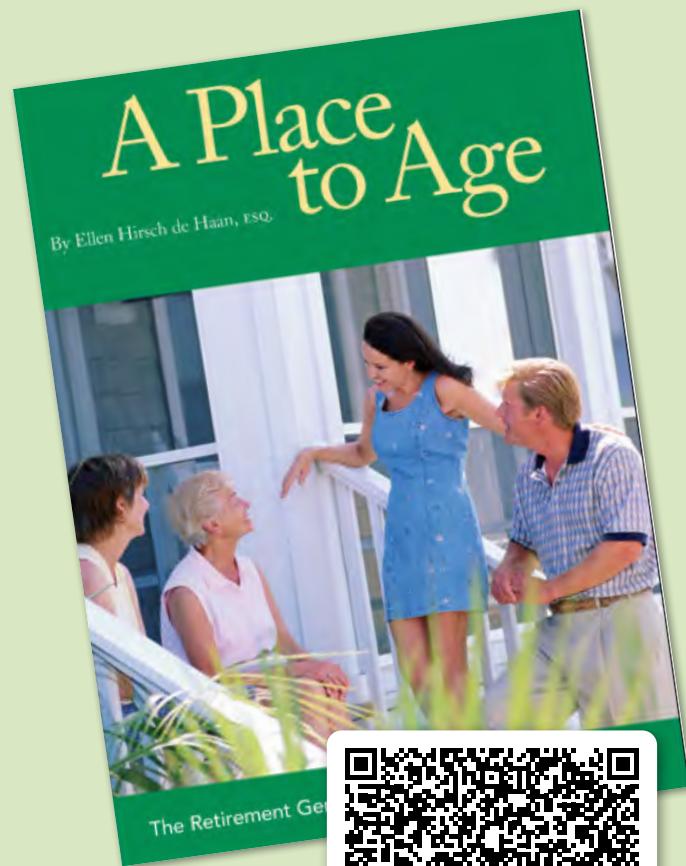
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What Does “Security” Really Mean?

By Christopher Bair

In today's rapidly evolving world, the concept of security has transcended its traditional boundaries, embracing a more holistic approach encompassing various aspects of our lives. For communities and homeowners associations (HOAs), security is no longer just about locking doors and windows or installing alarm systems. It's about creating a safe, secure, harmonious environment where residents can thrive. But what does “security” really mean for these communities? Let's explore the multifaceted nature of security in modern neighborhoods.



COMMUNITY RESIDENTS AND SECURITY

For community residents, security starts with a sense of safety in their homes and neighborhoods. This includes physical safety from crime but also extends to feeling secure in the face of emergencies like floods, earthquakes, and fires. Emergency preparedness plans, regular drills, and having access to reliable communication channels during crises are vital. Communities should invest in robust emergency response strategies that coordinate with local authorities and first responders.



CONTRACTED SECURITY COMPANIES AND OFFICERS

Many HOAs hire contracted security companies to provide a professional layer of protection. These companies offer trained security officers who patrol neighborhoods, monitor surveillance systems, and respond to incidents. Communication between security companies and law enforcement is crucial for effective crime prevention and resolution. This collaboration ensures a timely response to incidents and fosters a safer community environment.



TECHNOLOGICAL INNOVATIONS IN SECURITY

Modern technology plays a significant role in enhancing community security. Speeding detection technology and gated community vehicle access control can help manage traffic and prevent unauthorized entry. Telephone entry systems, visitor management software, and license plate recognition software streamline visitor and vendor entry, ensuring only authorized individuals can access the community.

Surveillance cameras with remote monitoring capabilities now offer an added layer of security. These advanced cameras can be monitored in real-time, allowing for immediate action if suspicious activity is detected...especially in pool and clubhouse areas at night. These technologies provide a comprehensive security solution.

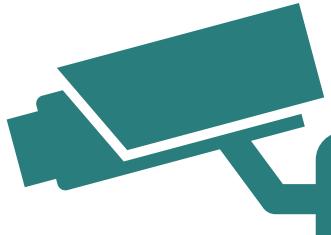


NEIGHBORHOOD WATCH PROGRAMS AND NIGHTLY COMMUNITY PATROLS

Neighborhood watch programs empower residents to take an active role in their community's safety. By fostering a culture of vigilance and cooperation, these programs help deter crime and enhance community bonds. Whether conducted by hired officers or volunteers, nightly security patrols will add an additional layer of deterrence and reassurance. This can also help with parking enforcement.



THE ROLE OF LIGHTING AND LANDSCAPING



Effective lighting and thoughtful landscaping are often overlooked aspects of community security. Well-lit streets, pathways, and common areas reduce the risk of accidents and deter criminal activity. Landscaping should be designed to eliminate hiding spots near homes and pathways, improving visibility and safety.



CYBERSECURITY IN COMMUNITY SETTINGS

Cybersecurity becomes an integral part of the security equation as communities become more digitally connected. Protecting personal information through strong passwords, secure websites, and multifactor authentication is essential. HOAs should educate residents on the importance of cybersecurity and implement robust protections for community websites and communication platforms.



PERSONAL AND FAMILY SAFETY

Beyond community-level measures, personal safety practices are crucial. Residents should be mindful of their surroundings when walking, driving, and traveling. Simple habits like locking car doors, keeping valuables out of sight, and being aware of one's surroundings can significantly enhance personal security. Also, in this age of junk emails and phishing scams, implementing cybersecurity measures like virtual private networks (VPNs), and adding multifactor authentication for emails and websites is critical to your online safety. Use strong passwords and change them often!

ATTITUDE AND AWARENESS

Ultimately, any security program's effectiveness hinges on individuals' attitude and awareness. A proactive approach, where residents stay informed about potential threats and participate in community security initiatives, fosters a secure environment. Regular community meetings, interaction with property management companies, and security workshops can keep everyone engaged and vigilant.

In conclusion, security for communities and HOAs is a comprehensive concept that integrates physical, technological, and behavioral elements. By leveraging modern technologies, fostering community cooperation, and maintaining a proactive attitude, communities can create a safe and secure environment where residents can live, work, and play with peace of mind. ☀



Christopher Bair is the Business Development Manager at Securitas Security Services in Palm Desert. He can be reached at: (760) 779-0728 or by email at Christopher.Bair@Securitasinc.com.

CAI's Foundation Releases New Maintenance Guidelines and Best Practices

By Steven Shuey, PCAM, CCAM

Coachella Valley communities are getting older and aging components are taking a toll. Many neighborhoods are starting to show the stress of keeping up with the times. If your community is wondering how a maintenance program fits in to the management of the community, there is a great book recently published by the Foundation for Community Association Research (FCAR) that speaks to maintenance in the community. It comes complete with best practices and check lists.

As a recently retired community association manager with many years of experience in property maintenance, I wish I'd had this book years ago. I recommend every board member read it and glean the understanding it brings regarding the importance of maintenance in the community. ☀

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Steven Shuey is a retired community association consultant from Personalized Property Management in the Coachella Valley. Steven serves on the Education Committee, serves on the chapter Strategic Planning Committee as a past board member, and maintains his designation as a Professional Community Association Manager (PCAM). He also serves on the National Faculty of CAI and is a past board member of the APCM. He may be contacted at IslandMgr@aol.com.



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Updates From Your Legislative Action Committee

By Christina Baine DeJardin, Esq.

AB 2114

Both the California Legislative Action Committee (CLAC) and CAI-CV's Legislative Support Committee have been closely following the progress of AB 2114, which was introduced earlier this year to amend Civil Code Section 5551 to allow licensed civil engineers to conduct the required inspections of exterior elevated elements (e.g., balconies, elevated walkways, etc.) in condominium projects. As originally enacted, Civil Code Section 5551 only allowed licensed structural engineers or architects to perform these inspections. However, with the deadline looming for performing the required inspections (January 1, 2025), condominium boards

were having difficulty finding licensed structural engineers and architects willing to conduct the inspections. As a result of the limited pool of experts who could perform the inspections, costs also increased. To address these issues, CLAC sponsored AB 2114 to add another category of experts who could perform the inspections. This bill also included an urgency clause to ensure that, if adopted, it would become effective immediately. On July 15, 2024, Governor Newsom signed the bill into law, and condominium boards can now use licensed civil engineers for their inspections. As a reminder, January 1, 2025, is the deadline for completing the first inspection.

"AS A RESULT OF THE LIMITED POOL OF EXPERTS WHO COULD PERFORM THE INSPECTIONS, COSTS ALSO INCREASED."



AB 2159

AB 2159 is another bill that was sponsored by CLAC and would allow homeowners associations to use electronic voting to conduct most membership votes subject to state election laws (Civil Code Section 5100, et seq.). AB 2159 would amend Civil Code Sections 5105, 5110, 5115, 5120, 5125, 5200 and 5260. Under the bill's current version, homeowners associations would need to amend their Election Operating Rules to permit electronic voting. It also sets forth several requirements for conducting an electronic vote, such as including instructions with the ballot explaining how to access the internet-based voting system and cast a vote by electronic secret ballot. Homeowners could also opt out of using the electronic voting system and cast their votes using a paper ballot. Homeowners associations would be required to retain a tally sheet of votes cast by electronic secret ballot, which would be listed as a record available for inspection and review by homeowners. If AB 2159 is enacted, homeowners associations will hopefully realize significant savings in the cost of conducting membership votes and get better participation from the membership. The bill has passed both the Senate Housing and Judiciary Committees and will be sent for a vote of the Senate after the summer recess. [①](#)

As always, CLAC is endeavoring to enact new laws and change existing laws to benefit homeowners associations. Please consider donating to CLAC to support this important work. To make a donation, please contact Executive Director, Cal Lockett at clockett@caicv.org.

How to Help Your Houseplants Thrive in the Heat

By Coachella Valley Water District (CVWD)

Just like garden plants, houseplants may need extra attention because of outside temperatures and air conditioners in desert summers.

Experts from the UC Davis Arboretum and Public Garden tell how to keep plants healthy and happy in heat.

First, when it's hot, plants need more water. Your container plants may need daily or twice-daily watering.

Do: Water in the early morning or evening when it's cooler and less water will evaporate.

Don't: Avoid overwatering. Some plant diseases thrive in hot, wet conditions. Follow the usual rule of thumb: Check the soil in the pot as deep as possible and only add water if it's dry.

Do: Try bottom watering for water-thirsty plants. Place pots with holes in a one-inch deep layer of water. Let the roots suck up the moisture until the soil feels moist toward the top of the plant.

Air conditioners can dry out plants.

Do: Move plants out of the direct path of air conditioning vents, possibly to a room with high humidity, such as a bathroom or kitchen.

Leaves on heat-stressed plants may roll, cup, wilt, and dry. Along with dryness, sunburn is a concern when leaves lose color and become brittle.

Do: Move plants out of direct sunlight. Plants with burned leaves can recover. A drip-irrigation system to slowly and deeply soak the soil helps revive a heat-stressed plant.

Do: Add mulch around the roots of container plants. That helps the plant conserve moisture and regulates the temperature of the soil.

Don't: Spray chemicals, fertilize, prune or replant in extreme heat.

If your houseplants suffer in the heat, consider this: Enjoy the beauty and durability of succulents, cactuses and aloes that use much less water and are a safer bet for surviving in hot weather. ☀

For a list of plants to grow best in the Coachella Valley:
CVWD.org/conservation



GET YOUR PCAM IN 2024!

PROFESSIONAL COMMUNITY ASSOCIATION MANAGER (PCAM)

The pinnacle of community association management. The PCAM designation is the highest professional recognition available nationwide to managers who specialize in community association management. Earn your PCAM and join the elite—the select—the best.

Recommended for experienced managers who want to demonstrate advanced skills and knowledge and who wish to be recognized as one of the best and most experienced managers in the nation.



EARN YOUR PCAM (VIDEO)

Definition of a community manager: A community association manager will have the knowledge, ethics, professionalism and skills with verifiable experience in financial, administrative, and facilities management in at least one community association, either commercial or residential. The community association manager must be compensated for providing professional guidance and assistance to the board of directors of any association(s) managed by that community association manager, whether the individual is acting as an full time independent contractor, or as an employee of a management firm, or as a general manager or executive director of a common interest development. Management of property other than community associations will not meet the qualifications for community association manager.

WHAT ARE THE PREREQUISITES FOR THE PCAM DESIGNATION?

- Five years of direct community association management experience.
- Successful completion of all six **M-200 level courses** (with the last PMDP course completed within the past five years).
- Successfully passed the **CMCA examination** administered by **CAMICB**.

HOW DO YOU PURSUE THE PCAM DESIGNATION?

- Complete the prerequisites.
- Earn a minimum total of 125 points on the PCAM application, including:
 - A minimum of 55 points in Section II.
 - A maximum of 20 points is allowed for Professional Designations or Licenses.
 - A maximum of 30 points is allowed for Formal Education.
- Complete the PCAM application. You may attached additional copies of each page if needed.
- Submit the nonrefundable application fee with the PCAM application.
- Member: \$225 (Individual Manager Membership)
- Nonmember: \$460
- All applicants have one year from the date of application approval to complete the Case Study. Failure to complete a Case Study will require you to re-apply with payment. Your PCAM application must have been approved prior to you being able to register to sit for the Case Study.

HOW DO YOU MAINTAIN THE PCAM DESIGNATION?

- Pay annual maintenance fees (due August 1st of each year).
- Member: \$160 (Individual Manager Membership)
- Nonmember: \$385
- Redesignate every three years in August and meet continuing education requirements.
- Comply with the **CAI Professional Manager Code of Ethics**.

PLEASE VIEW THE REDESIGNATION FAQS FOR MORE INFORMATION.

Forms

- **PCAM Application**
- **PCAM Redesignation Form**
- **PCAM Reinstatement Application**

Useful Links

- **Promote Your PCAM**
- **Certificate Frame Information**
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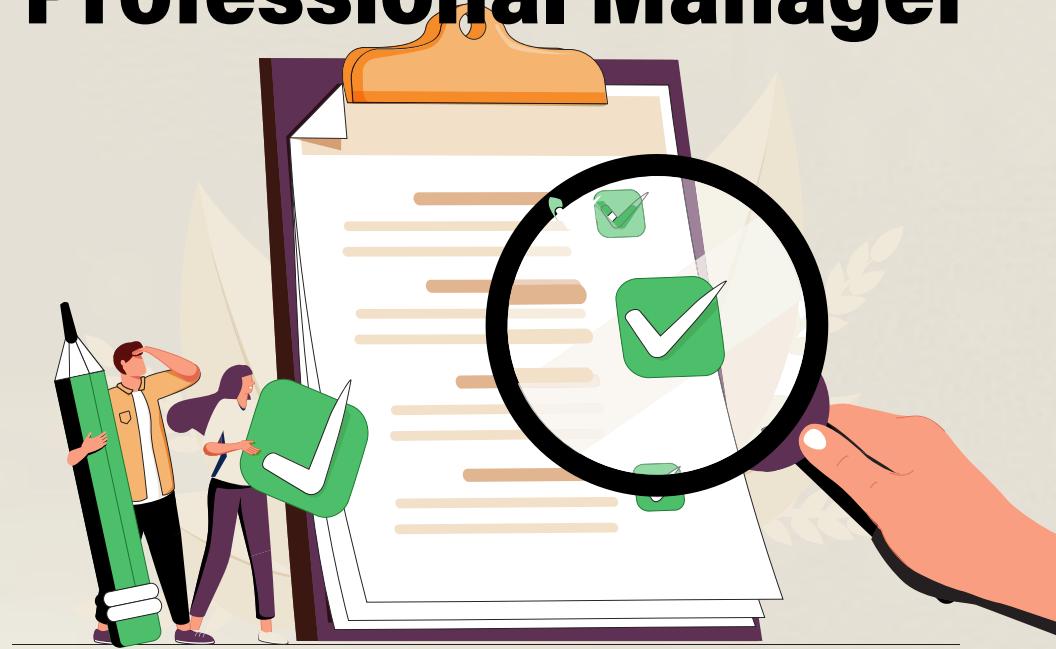
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The Ethical Professional Manager

By Steven Shuey, PCAM

Community associations have grown in popularity over the years. At the same time, concern has grown about how those who conduct business within community associations operate. CAI has long felt it is important for the industry to self-regulate ethical conduct for those who work within and for homeowner associations, condominiums, and housing cooperatives. Today, CAI has a code of ethics that includes 15 points to guide managers and other professionals to perform with integrity. This code was developed to provide guidelines and expectations that homeowners association leaders can depend on when hiring professionals to serve their communities. A committee of subject matter experts and peers monitor, update, and enforce the code. Enforcement is handled through a complaint process outlined in the procedures.

There are several designations community association professionals can earn. These include the Certified Manager of Community Associations (CMCA), Association Management Specialist (AMS), Professional Community Association Manager (PCAM), and Large-Scale Manager (LSM). Management companies can obtain the Accredited Association Management Company (AAMC). Select business partners can obtain the Reserve Specialist (RS) designation or the Community Insurance and Risk



Management Specialist (CIRMS) designation. Attorneys can apply to become fellows in the College of the Community Association Lawyers (CCAL).

Each of these categories has its own professional code of ethics.

When an individual or firm obtains one of these designations, they are required to sign a document acknowledging they understand the code of ethics. Community association boards can rely on the knowledge, expertise, and professional ethics of those who have earned them. The standards and expectations are high.

CODE OF ETHICS ENFORCEMENT

For a code of ethics to have value, there needs to be a method of enforcement. CAI has a good enforcement plan and methodology. As a result, standards are upheld and reliable.

If anyone feels a CAI-designated professional has violated the code of ethics, a complaint may be submitted for review. Formal complaints are carefully reviewed, scrutinized, and considered according to a specific enforcement plan. Although some complaints are dismissed because

they do not meet the violation criteria, those complaints that do are reviewed by a panel of qualified professionals who dig deep into the issue and come up with appropriate sanctions. Penalties can range from a letter of warning to revocation of the designation and cancellation of CAI membership.

CAI and professionals who maintain high ideals of conduct also insist on maintaining a very high ethical standard that homeowners and the leadership in communities can depend upon. (Visit www.caionline.org/ethics for more information. Community association board members also are encouraged to adopt and adhere to a code of ethics. Visit www.caionline.org/CAliving.)



Steven Shuey is a retired community association consultant from Personalized Property Management in the Coachella Valley. Steven serves on the Education Committee, serves on the chapter Strategic Planning Committee as a past board member, and maintains his designation as a Professional Community Association Manager (PCAM). He also serves on the National Faculty of CAI and is a past board member of the APCM. He may be contacted at IslandMgr@aol.com.



MEET THE COMMITTEE CHAIR

Jolen Zeroski, Business Partner Committee

By Jennifer James, Esq.



Jolen Zeroski
First Citizens Bank

"Jolen provides integrated banking solutions and assists with financing projects to repair and update the associations they serve."

This article is part of a series featuring CAI-CV Board members and committee chairs. This month, we are featuring Jolen Zeroski, who serves as Chair of the Business Partner Committee.

Jolen has been a dedicated banker since her early twenties. Starting in the accounting department of a small community bank, she worked her way up through various banking roles, gaining extensive experience. In 1999, she entered the Community Interest Development (CID) industry as an operations clerk at a bank specializing in Specialty Banking, including HOA management companies. By 2001, Jolen had transitioned into a sales role, allowing her to connect with many individuals in the industry. With nearly 25 years in the CID industry, Jolen's journey is marked by her dedication and growth.

She currently works at First Citizens Bank within the Community Association Banking (CAB) division. This dedicated division serves the CID industry, where Jolen is a trusted advisor to management companies serving HOAs. She provides integrated banking solutions and assists with financing projects to repair and

update the associations they serve.

Jolen is the proud mother of two children: Aaron, aged 34, and Amie, aged 28. She also has a beloved cat named Bolt, who got her name from the lightning bolt-shaped mark on her face when she was a kitten.

An avid volunteer, Jolen enjoys participating in charitable activities. One of her favorite events is the Warburton Charity Golf Tournament held annually in the Coachella Valley. She also

dedicates significant time to CAI-CV. Outside of volunteering, Jolen loves playing golf, hiking, traveling, cruises, and all-inclusive resorts in warm locations.

While Jolen doesn't credit herself with management skills, her role as Chair of the Business Partner Committee at CAI-CV proves otherwise. As chair, she effectively manages and collaborates with others, contributing significantly to the organization's success. Her leadership has been instrumental in guiding the committee's initiatives and ensuring they align with CAI-CV's goals.

Jolen joined CAI-CV to network with its members and make her expertise in banking available to those in need. Jolen's primary goal is to be a trusted financial advisor to the CID industry, ensuring her clients receive the best possible banking solutions and support.

Jolen, thank you for your service to CAI-CV and for your dedication to the CID industry! ☺



Jennifer James, Esq., is an attorney with HOA Legal Services. She can be reached at (760) 702-7929 or by email at jennifer@jenniferjameslaw.com

Changes Coming to CAI's Board Member Education Public Policy

By Dawn M. Bauman, CAE and Phoebe E. Neseth, Esq.

CAI's Government and Public Affairs Committee is excited to inform you that in June, CAI's Board of Trustees approved recommendations to substantially update CAI's Board Member Education Public Policy. This decision comes after a comprehensive vetting process that included numerous surveys and feedback from CAI members, homeowner leaders, chapters, member representation groups, and legislative action committees.

The update comes in response to a marked increase in legislation nationwide addressing board member education following the 2021 tragic partial condominium collapse in Surfside, Fla. This incident highlighted the critical need for

are pursuing such legislation. CAI will not actively pursue mandatory training legislation.

This balanced stance ensures that CAI acknowledges the importance of board member education. It also recognizes the potential downside of mandatory training requirements and seeks to support effective and practical solutions.

By advocating for accessible and comprehensive educational resources, CAI aims to empower board members to fulfill their roles effectively without the burden of mandatory training requirements. This approach ensures community associations continue to thrive under the leadership of well-informed and dedicated volunteer board members.

We thank Michael Johnson, CMCA, AMS, PCAM, chair of the CAI Board Member Education Public Policy Task Force, and all task force members, for their time and dedication over the last year and a half on this critical policy

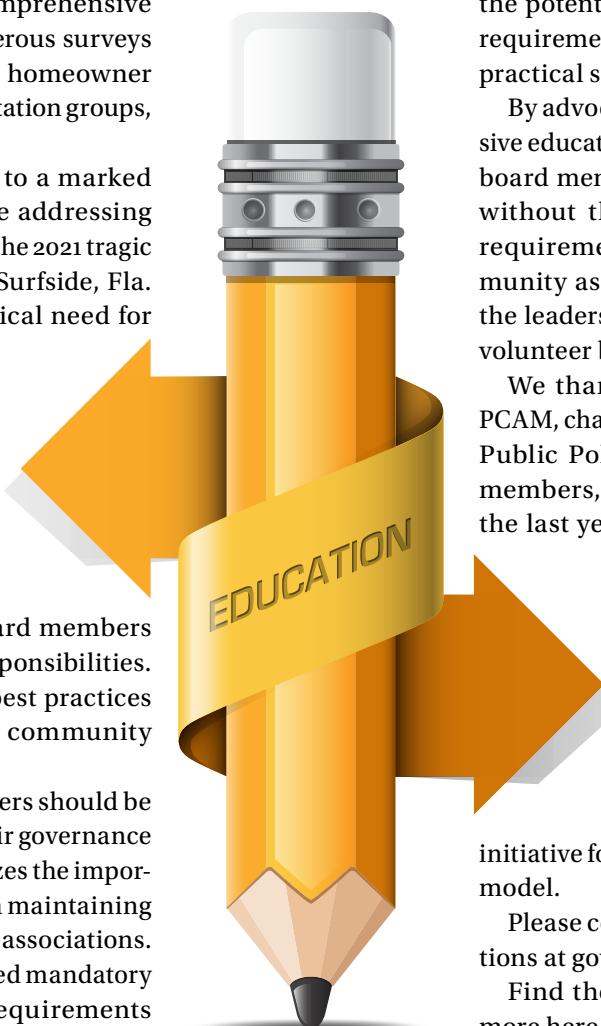
"Educated boards can implement best practices and ensure good governance in community associations."

well-educated and competent board members who understand their roles and responsibilities. Educated boards can implement best practices and ensure good governance in community associations.

CAI firmly believes board members should be knowledgeable and proficient in their governance duties. The updated policy emphasizes the importance of board member education in maintaining safe and well-managed community associations.

However, CAI ultimately concluded mandatory government-imposed training requirements could have unintended consequences. Such mandates could deter volunteerism, a cornerstone of community associations, and potentially lead to costly education programs that are insufficient to cover the essential core competencies and best practices needed for effective governance.

A key aspect of the updated policy is its nuanced approach to legislative involvement. The policy allows the committees to define the terms and support mandatory board member education requirements if other groups or the legislature



"This approach ensures community associations continue to thrive under the leadership of well-informed and dedicated volunteer board members."

initiative for the community association housing model.

Please contact us directly anytime with questions at government@caionline.org.

Find the new public policy here and learn more here. www.caionline.org



Dawn M. Bauman, CAE, is the Chief Strategy Officer for CAI. Dawn can be reached at dbauman@caionline.org.



Phoebe E. Neseth, Esq. is the Senior Director of Government & Public Affairs for CAI. Phoebe can be reached at pneseth@caionline.org.



SAVE THE DATE

CAI-CV's Annual Awards and Casino Night

MASQUERADE BALL

Friday, January 24, 2025, 5:30 p.m.

SUN CITY PALM DESERT

Sponsorships Available

EARLY REGISTRATIONS

Managers & Board Members \$100

Non-sponsor Business Partners \$200



Better HOA Living

49950 Jefferson Street, Suite 130-117
Indio, CA 92201

CAI-CV UPCOMING EVENTS – SCAN QR OR CLICK TO SIGN UP

SEPTEMBER



CAI-CV's Educational Lunch Program & Mini Trades Show
WHEN: Friday, September 20, 2024, 11:15 a.m.
WHERE: Sun City Palm Desert

**REGISTRATION:
SPONSORSHIPS:**

OCTOBER



CAI-CV & DCHC Board Member Workshop - Requests for Proposals (RFPs), Contracts, Legal & Liabilities
WHEN: Tuesday, October 8, 2024, 8:30 AM
WHERE: RAP Center & Zoom



CAI-CV Educational BREAKFAST Program & Mini Trade Show
WHEN: Friday, October 18, 2024, 8:00 AM
WHERE: Sun City Palm Desert

**REGISTRATION:
SPONSORSHIPS:**



Axes & Ales Oktoberfiesta
WHEN: Friday, October 25, 2024, 5:30 PM
WHERE: Pro Landscape Nursery, Thousand Palms

**REGISTRATION:
SPONSORSHIPS:**

**SIGN UP FOR LOCAL EVENTS AT
CAI-CV.ORG**



2024 Marketing Plan

**FOR CAI NATIONAL EVENTS AT
CAIONLINE.ORG**



**WATCH FOR THE CAI-CV MONDAY UPDATE
WITH ALL EVENTS AND PROGRAMS**

C O R P O R A T E S P O N S O R S

TITANIUM

AMS Paving, Inc.
Asphalt MD's
Associa DRM
C. L. Sigler & Associates
Fiore Racobs & Powers, A PLC
Gardner Outdoor and
Pool Remodeling
Signarama
Sunshine Landscape
Vantage Point Construction

PLATINUM

Ivan's Painting & Maintenance
Prendiville Insurance Agency

GOLD
Delphi Law Group, LLP
EmpireWorks
Epsten, APC
First Citizens Bank
Flood Response
Precision Painting & Reconstruction
Western Pacific Roofing

SILVER

Accurate Termite & Pest Control
Alan Smith Pools
Behr Paint Company
Cooper Coatings, Inc.
Dunn-Edwards Corporation
Nissho of California, Inc.
SCT Reserve Consultants
Tinnelly Law Group
Vintage Landscape

BRONZE

Alliance Association Bank
Allied Universal Security Services
Brightview Landscape Services
Broadband Agreements
Community Legal Advisors
First Service Residential
LaBarre/Oksnee Insurance Agency

PatioShoppers, Inc.
Popular Association Banking
Premier Community Association Mgmt.
Securitas Security Services
Sun King Electric
Vista Paint