

AUGUST 2024

AUGUST 2024

HOA Living MAGAZINE

COMMUNITY ASSOCIATIONS INSTITUTE | COACHELLA VALLEY CHAPTER

10 COVER FEATURE

Sunrise Racquet Club

OWNERS ASSOCIATION

FEATURES

- 13 Is Your HOA a Best Practice Community?
- 19 Insurance, Assessments, and Your Association Budget
- 20 The Importance of a Solid Reserve Study
- 31 Get Your PCAM in 2024!
- 32 The Ethical Professional Manager
- 34 Changes Coming to CAI's Board Member Education Public Policy

PHOTOS COURTESY OF MATT LAWTON, CIC, CIRMS, OCV INSURANCE SERVICES

\$9.50

Community management THAT WORKS FOR YOU.

At Associa Desert Resort Management, our top priority is keeping all aspects of your community running seamlessly. Whether it's our top-tier management, secure financials, on-demand maintenance, or advanced technology, our complete and comprehensive suite of services makes leading and living in a managed community better and easier than ever. Leave the hard work to us, so you can focus on what matters.

Accomplish more with
Associa Desert Resort Management.
Contact us today!



Robin Poole
760.895.7150
rpoole@drmineternet.com
www.drmineternet.com



CONSTRUCTION MANAGEMENT ♦ CONSULTING
SPECIALIZING IN HOAs SINCE 2001
 We do it all, consulting from your roof down to your foundation!

COACHELLA VALLEY'S RESOURCE FOR **SB 326 INSPECTIONS!**



Visit www.Siglercm.com
 to see our project
 gallery and watch our
 informational video:



Click here for our Informational regarding
 Construction Consulting in Common
 Interest Developments that was broadcast
 on Dennis Quaid's "Viewpoint Project":



COACHELLA VALLEY: (760) 469-3048 SF BAY AREA: (408) 922-0262
EMAIL US: inquiry@siglercm.com

MARSHALL F. COOPER

79-952 Memorial Place
 La Quinta, CA 92253
 CA Lic. #721489

Bus: 760-422-4366
 Cell: 760-250-3034
marshall@coopercoatings.com

COOPER COATINGS INC.

Concrete Overlay Systems

HOA Services-Commercial-Residential-Interior-Exterior
 Water Proofing-Staining-Epoxy-Kool Deck Repair-Grinding
www.coopercoatings.com

REAL ROOFING KNOWLEDGE FOR REAL ROOFING SOLUTIONS



SPRAY POLYURETHANE FOAM SYSTEMS • TILE SYSTEMS • SHINGLE & SHAKE SYSTEMS
 ROOF REPAIRS • ROOF SYSTEM MAINTENANCE • BUDGET RESERVES • CONSULTING

760|813|9999

www.RAMROOF.com



ASSOCIATION PROFESSIONAL SERVICES

Serving All of Your HOA Election Needs

Gloria Kirkwood, PCAM | Sharron Badham, CCAM
 (760) 262-7715 | info@aps-elections.com

Your source for Association Election Solutions

AsphaltMD's

The Desert's #1 Choice for Asphalt Repair & Maintenance

Locally Owned and Operated Since 1982
 (40 Years of Asphalt Excellence)

www.AsphaltMDs.com 760.863.4500

41-700 N. JACKSON STREET, INDIO, CA 92203 LIC#626842

NEW AND RENEWING MEMBERS

NEW BUSINESS PARTNERS

EUNIFY, INC.

Ms. Sarah Sukta
(480) 802-4284
ssukta@eunify.net

HOA MAILERS

Mr. Josh Minton
(949) 916-2456
josh@hoamailers.com

RENEWING BUSINESS PARTNERS

ADAMS | STIRLING PLC

Ms. Candace Lee Schwartz
(800) 464-2817
cschwartz@adamsstirling.com

ALLIED TRUSTEE SERVICES

Mr. Stefan Murphy
(916) 960-5363
info@alliedtrustee.com

AMS PAVING, INC.

Ms. Liz Williams
(800) 357-0711
Liz@amspaving.com

CM SQUARED, INC.

Mr. Tad Black
(800) 262-4047
tad@gocm2.com

EMPIRE TECHNOLOGIES GROUP, INC.

Mr. Pedro Estrada
(909) 466-1316
pedro@empiretechs.com

IVAN'S PAINTING & MAINTENANCE

Mr. Raul Ivan Castillo
(760) 507-9980
ivan@ivansptng.com

NEWMAN CERTIFIED PUBLIC ACCOUNTANT PC

Mr. Jeremy Newman
(844) 566-1824
Jeremy@hoacpa.com

PAYNE PEST MANAGEMENT, INC.

Mr. Jason Payne
(858) 277-2228
jpayne@paynepestmgmt.com

PRO ELECTIONS LLC

Abigail Padou
(209) 559-1448
info@pro-ei.com

ROOF ASSET MANAGEMENT, INC.

Mr. Rob Winkle
(760) 333-9900
rob@ramroof.com

S.B.S. LIEN SERVICES

Mr. Mitch Willet
(818) 991-4600
mwillet@sbstrustdeed.com

VINTAGE ASSOCIATES/ECOWISE LANDCARE

Mr. Kyle Gritters
(760) 772-3673
kyleg@thevintageco.com

RENEWING MANAGEMENT COMPANIES

KEYSTONE

Mr. Matthew Williams, CMCA, AMS, PCAM
(949) 777-1160
mattwilliams514@gmail.com

NEW MANAGERS

ASSOCIA DESERT RESORT MANAGEMENT

Ms. Melanie Millsap Harriman
(760) 346-1161
MMillsap@drmineternet.com

Ms. Jessica Perez
(760) 346-1161
jperez@drmineternet.com

Ms. Petra Souckova
(760) 346-1161
PSouckova@drmineternet.com

SEABREEZE MANAGEMENT COMPANY, INC.

Ms. Samantha Anderson
(760) 537-1953
Samantha.Anderson@seabreezemgmt.com

THE LAKES COUNTRY CLUB

Michael L. Rood
(925) 899-3633
mrood@7lakescountryclub.com

THE MANAGEMENT TRUST, DESERT REGION

Ms. Kaylynn Hudson
(760) 862-6305
kaylynn.hudson@managementtrust.com

RENEWING MANAGERS

ALBERT MANAGEMENT CORPORATION

Mrs. Jeri Mupo, CMCA, AMS, PCAM
(760) 772-7234
gm@irhoa.com

ASSOCIA DESERT RESORT MANAGEMENT

Ms. Mallory Aranda
(760) 346-1161
maranda@drmineternet.com

Ms. Carol Calhoun
(760) 346-1161 (103)
ccalhoun@drmineternet.com

Mrs. Sierra Lynn Carr, CMCA, AMS, PCAM
(760) 391-0865
scarr@drmineternet.com

Ms. Rosie Galla, CMCA, AMS, PCAM
(760) 346-1161
rgalla@drmineternet.com

Ms. Sandra Garland
(760) 818-5355
sgarland@drmineternet.com

Mr. Keith L. Lavery, CMCA, PCAM
(760) 346-1161
klavery@drmineternet.com

Ms. Michelle Renee Logerfo
(760) 346-1161
mlogerfo@drmineternet.com

Ms. Ivonne Nathalie Romano
(760) 346-1161
iromano@drmineternet.com

Ms. Karin Romjue
(760) 346-1161
kromjue@drmineternet.com

Ms. Melyssa Sobczyk
(760) 346-1161
msobczyk@drmineternet.com

Ms. Laurie Theresa Stratton
(760) 346-1161
lstratton@drmineternet.com

Mr. Brandon James Surdock
(657) 255-0328
bsurdock@drmineternet.com

Mrs. Melisa Torres
(760) 333-1341
melisa1029@gmail.com

Mr. Terry Dean Wolfgram
(760) 346-1161
twolfgram@drmineternet.com

DESERT FALLS MASTER ASSOCIATION

Mr. Scott Styve
(760) 409-4173
sstyve@dfmaster.com

RANCHO LAQUINTA MASTER ASSOCIATION

Mrs. Nena Therese Rutherford-Milward,
CMCA, AMS, PCAM
(760) 777-8807
nrutherford@rancholaquinta.com

THE MADISON CLUB OWNERS ASSOCIATION

Ms. Berenice Cēja
(760) 391-4564
cmanager@madisonclubowners.org

THE MANAGEMENT TRUST

Ms. Susanne A Graeff, CMCA, AMS
(760) 406-3145
sue.graeff@managementtrust.com

NEW HOMEOWNER LEADERS

HOVNANIAN'S FOUR SEASONS AT TERRA LAGO COMMUNITY ASSOCIATION INC.

Mr. Ken Hansely

Mr. Joe Macera

Mr. Paul A. Masalakowski

Mr. Mike Scoggins

Ms. Amy Williams

MISSION LAKES COUNTRY CLUB CONDOMINIUMS, INC.

Mr. Walt Dwyer

Mr. Michael Jennings

Ms. Helen Jones

Ms. Karen Pike

MOUNTAIN VIEW COUNTRY CLUB HOMEOWNERS' ASSOCIATION

Mr. Mark Child

Mr. Rodney Gentry

Mr. Carl Giordano

Mr. Scot Woodward

PALM DESERT COUNTRY CLUB HOMEOWNERS ASSOCIATION

Ms. Tina See

PGA WEST II RESIDENTIAL ASSOCIATION

Mr. Alex Martinez

RENEWING HOMEOWNER LEADERS

MONTECITO AT PALM DESERT HOMEOWNERS ASSOCIATION

Mr. John Contreras

Mr. Larry Davis

Mr. Gary Ewaska

Mrs. Patty Stutz

Mr. Bernie Weslow

MOUNTAIN VIEW COUNTRY CLUB HOMEOWNERS' ASSOCIATION

Ms. Janalee Arthur

Mr. Tim Breedlove

Ms. Laurie Duncan

Ms. Anne Farnham

Mr. Ed Keegan

Ms. Cheryl Krausfeldt

Ms. Andi Mallen

PGA WEST II RESIDENTIAL ASSOCIATION

Mrs. Carol Bayless

Mr. Dave Hurt

Mr. Spencer King

Ms. Sherri Lusk

Ms. Barbara Montavon

Mr. Stan Neves

PORTOLA COUNTRY CLUB

Mr. Rick Anderson

Mr. Bob Haueter

Mr. Michael J. Patino

Ms. Heide Pylatuk

Mr. Gilbert Rodgers

Ms. Karen Woolworth

RAMON ESTADOS HOMEOWNERS ASSOCIATION

Mr. David E. Greig

Ms. Peggy Grosser

Mrs. Ashley Herrera

Mr. Jim Poutre

Mr. Sid Schwartz

Ms. Susan Uhrlass

SUNRISE COUNTRY CLUB HOMEOWNERS ASSOCIATION, INC.

Ms. Judy Berzins

Ms. Susan Christensen

Mr. Gary Clifton

Mr. Jeffrey Coultas

Mr. Patrick Gabriele

Ms. Linda Gosney

Mr. Harvey A. Harris

Mr. Michael Miller

Ms. Monique St. Jacques

VISTA MONTANA

Mr. Dwayne DeRose

Mrs. Barbara Eastman

Ms. Connie Imerti

Mr. Andrew LaRue

Ms. Sharon Misseldine

Mr. Ed K. Swafford

2024 HOA LIVING MAGAZINE COMMITTEE MEMBERS

MEAGHAN GAFFNEY-HOWE, CMCA, AMS
CHAIR

The Gaffney Group, Inc.

ASHLEY LAYTON, PCAM, AMS, CMCA
CO-CHAIR

Premier Community Association Management



JENNIFER JAMES, ESQ.
CO-CHAIR

HOA Legal Services

MIKE TRIDMAN
BOARD LIAISON

Mira Vista at Mission Hills HOA

CHRISTOPHER BAIR

Securitas Security Services

SIERRA CARR, CMCA, AMS, CCAM, PCAM
Associa Desert Resort Management

JAMIE PRICER

Coachella Valley Water District

JASON SAVLOV, ESQ.

Adams | Stirling, PLC

JOHN SCHUKNECHT

LaBarre/Oksnee Insurance

STEVEN SHUEY, PCAM

Personalized Property Management (Ret.)

CHRIS SIGLER, B.S.C.E., CDT

C.L. Sigler & Associates, Inc.

LORENA STERLING, CAFM

Community Association Financial Services

CREATIVE DIRECTOR & GRAPHIC DESIGNER

RODNEY BISSELL



Bissell Design Studios, Inc.
rodney@bisselldesign.com
(714) 293-3749

PHOTOGRAPHY

MATTHEW LAWTON, CIC, CIRMS, EBP

OCV Insurance Services
matt@ocvinsurance.com
760-774-2099

JAY JARVIS

jayj92260@gmail.com
571-235-5420

ARTICLE SUBMISSIONS OR ADVERTISING INFORMATION

HOALiving@cai-cv.org

SUBSCRIBER SERVICES

The Coachella Valley *HOA Living Magazine* is a publication expressly prepared for association leaders, managers and related business professionals of the Community Associations Institute. Members are encouraged to submit articles for publishing consideration. All articles accepted for publication in *HOA Living* are subject to editing and rewriting by the *HOA Living* Committee.



FEATURES

- 10 Sunrise Racquet Club Owners Association**
By Ashley Layton, PCAM, AMS, CMCA
- 13 Is Your HOA a Best Practice Community?**
- 19 Insurance, Assessments, and Your Association Budget**
By John Schuknecht, CMCA, AMS
- 20 The Importance of a Solid Reserve Study**
By Chris Sigler, B.S.C.E., C.D.T.
- 31 Get Your PCAM in 2024!**
- 32 The Ethical Professional Manager**
By Steven Shuey, PCAM
- 34 Changes Coming to CAI's Board Member Education Public Policy**
By Dawn M. Bauman, CAE and Phoebe E. Neseth, Esq.

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



NEWMAN
Certified Public Accountant, PC

THE HOA CPA FIRM

Audit & Tax Services

*Contact us now to learn how
we can help your association!*

contracts@hoacpa.com
info.hoacpa.com/CV



Choose Educated Business Partners

Julie R. Balbini, Esq., Fiore Racobs & Powers, A PLC
Micha Ballesteros, Cartwright Termite & Pest Control, Inc.
Roxi K. Bardwell, Advanced Reserve Solutions, Inc.
Rodney Bissell, Bissell Design Studios, Inc.
Gary Butler, Asphalt MD's
Linda Cardoza, Alliance Association Bank
Will Cartwright, Cartwright Termite & Pest Control, Inc.
Christopher Cellini, Flood Response
Todd Chism, PatioShoppers
DJ Conlon, Poppin Promotional Products
Lori Fahnestock, Powerful Pest Management
Julie Frazier, Frazier Pest Control, Inc.
Victoria Germyn, Teserra
Elaine Gower, The Naumann Law Firm, PC
Michael Graves, SCT Reserve Consultants
Amanda Gray, Harvest Landscape, Inc.
Jennifer James, Esq., HOA Legal Services
Erin Kelly, Banc of California
Megan Kirkpatrick, Kirkpatrick Landscaping Services
Jared Knight, Precision Construction & Painting
Katy Krupp, Fenton Grant Mayfield Kaneda & Litt, LLP
Matt Lawton, CIC, CIRMS, OCV Insurance Services
Larry Layton, Kirkpatrick Landscaping Services
Alison LeBoeuf, Sherwin-Williams
Mike Mastropietro, OCBS, Inc.
Chris Meyer, Asphalt MD's
Greg Morrow, Eagle Roofing Products
Fran Mullahy, Conserve LandCare
Bridget Nigh, BEHR Paints
Matt Ober, Esq., Richardson Ober DeNichilo LLP
Lily Ortega, Pro Landscape
Chet Oshiro, EmpireWorks
Jed Pannell, Distinctive Restoration
Mallory Paproth, SCT Reserve Consultants
Elisa Perez, Esq., Epsten, APC
Jay Powell, Ben's Asphalt
Dana Pride, Automation Pride
Mike Rey, LaBarre/Oksnee Insurance Agency
Kelly Richardson, Esq., Richardson Ober DeNichilo LLP
Brent Sherman, Animal Pest Management Services, Inc.
Liz Williams, AMS Paving
Taylor Winkle, Roof Asset Management
Bevan Worsham, AMS Paving
Jolen Zeroski, First Citizens Bank

Become an Educated Business Partner

Call the CAI-CV office or go to www.cai-cv.org
for more information.

YOUR HOA CAN BE OUR NEXT COVER

**NO COST
TO YOU**
EVERY COVER
HAS A STORY.
TELL US YOURS!



MUST BE CAI-CV MEMBER IN GOOD STANDING

CONTACT
THE CAI-CV OFFICE

(760) 341-0559
admin@cai-cv.org

2024 COACHELLA VALLEY CHAPTER BOARD OF DIRECTORS



PRESIDENT
JULIE BALBINI, ESQ.
Managing Attorney, CV Office,
Fiore Racobs & Powers, A PLC

PAST PRESIDENT
CLINT ATHERTON, PCAM
General Manager, Sun City Palm Desert

PRESIDENT-ELECT
MARK DODGE, CMCA, AMS
Branch President & CEO
Associa Desert Resort Management

SECRETARY
BG (RET) GUIDO PORTANTE
Director, Mira Vista at Mission Hills HOA



TREASURER
JOLEN ZEROSKI, CMCA
VP, Regional Account Executive
First Citizens Bank



DIRECTOR
ERIN KELLY
AVP, HOA Senior Manager
Banc of California

DIRECTOR
BRUCE LATTA, CMCA
Manager, Indio Properties/President,
Desert Cities HOA Council

DIRECTOR
MICHELLE LOPEZ, CMCA, AMS
Director of Community Management,
Powerstone Property Mgmt.

DIRECTOR
BRIDGET NIGH
Regional Account Manager,
BEHR Paint Company



DIRECTOR
LILY ORTEGA, CMCA
Office Manager, Pro Landscape

DIRECTOR
MIKE TRAUDMAN
President, Mira Vista at Mission Hills HOA
Commissioner, CAMICB

CONTACT US
CAI Coachella Valley
49950 Jefferson Street, Suite 130-117
Indio, CA 92201
(760) 341-0559 | www.cai-cv.org

CAL LOCKETT
Executive Director
clockett@cai-cv.org

The materials contained in this publication are designed to provide our members with timely and authoritative information; however, the CAI Coachella Valley Chapter is not engaging in the rendering of legal, accounting or other professional types of services. The Coachella Valley Chapter has not verified and/or endorsed the contents of these articles or advertising. Readers should not act on the information contained herein without seeking more specific professional advice from legal, accounting or other experts as required.



DEPARTMENTS

CAI NATIONAL

- 22 **CAI New Reserve Study Best Practices**
- 22 **Aging Communities - Aging Residents - A Place to Age**
- 27 **CAI's Foundation Releases New Maintenance Guidelines and Best Practices**
By Steven Shuey, PCAM, CCAM

SECURITY

- 26 **What Does "Security" Really Mean?**
By Christopher Bair

CALIFORNIA LEGISLATIVE ACTION COMMITTEE UPDATE

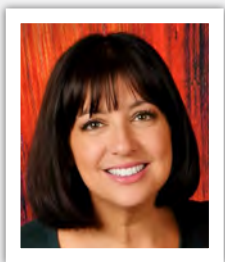
- 29 **Updates from Your Legislative Action Committee**
By Christina Baine DeJardin, Esq.

WATER WISE

- 30 **How to Help Your Houseplants Thrive in the Heat**
By Coachella Valley Water District (CVWD)

CHAPTER NEWS

- 4 **New & Renewing Members**
- 6 **CAI-CV Educated Business Partners**
- 7 **CAI-CV Board of Directors**
- 8 **President's Message**
- 9 **List of Advertisers**
- 9 **Stop Bad Legislation Now!**
- 33 **Meet the Committee Chair**
Jolen Zeroski, CMCA, Chair, Business Partner Committee
By Jennifer James, Esq.
- 36 **CAI-CV Upcoming Events**
- 36 **CAI-CV Marketing Plan**
- 36 **CAI-CV Corporate Sponsors**



President's Message

Julie Balbini, Esq.
Managing Attorney, CV Office,
Fiore Racobs & Powers, A PLC



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,
Legal & Liabilities



10/18/2024

CAI-CV Educational
BREAKFAST Program
& Mini Trade Show



10/25/2024

Axes & Ales
Oktoberfiesta



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

CAI-CV BOARD
BOOTCAMP
& MANAGER
EDUCATION



12/6/2024

CAI-CV's Sips &
Shots Wine and
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

STOP BAD LEGISLATION NOW!

CONTRIBUTE TO CAI'S EFFORTS TO
PROTECT THE HOA INDUSTRY

Support the California Legislative
Action Committee (CLAC)



**CAI HOA'S
CONTRIBUTE
\$1 PER DOOR**



CLICK HERE OR SCAN THE
QR CODE TO SIGN UP TODAY



Fiore Racobs & Powers

A Professional Law Corporation



A FULL-SERVICE LAW FIRM DEDICATED TO THE
SUCCESS OF COMMUNITY ASSOCIATIONS

- > Legal Opinions
- > Enforcement
- > Governing Document Amendments
- > Contract Review
- > Assessment Collections
- > Litigation
- > Elections/Annual Meetings
- > General Legal Services

The Recognized Authority in
Community Association Law

FIORLAW.COM
760-776-6511

ACCOUNTING

NEWMAN CERTIFIED PUBLIC ACCOUNTANT..... 6

ASPHALT

ASPHALT MD'S..... 3

COMMUNITY MANAGEMENT

ASSOCIA DESERT RESORT MANAGEMENT.....2

CONCRETE OVERLAY SYSTEMS

COOPER COATINGS INC. 3

CONSTRUCTION MANAGEMENT

C.L. SIGLER & ASSOCIATES..... 3

ELECTION SERVICES

ASSOCIATION PROFESSIONAL SERVICES 3

LEGAL

FIORE RACOB'S & POWERS, A PLC..... 9

PEST CONTROL

POWERFUL PEST MANAGEMENT 9

POOLS

GARDNER OUTDOOR AND POOL REMODELING 17

ROOFING

ROOF ASSET MANAGEMENT 3

ADVERTISERS



**POWERFUL
PEST MANAGEMENT**

Ph. (760) 341-7770 • (760) 771-1656 • (760) 323-4669
Fax (760) 341-2290 • www.powerfulpestmanagement.com
Email - powerfulpest@dc.rr.com

**FAST COURTEOUS PROFESSIONAL SERVICE
YOUR PEST WON'T KNOW WHAT HIT'EM**



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



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

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



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. 📧



Ashley Layton, PCAM, AMS, CMCA is Vice President of Premier Community Association Management. She can be reached at (760) 345-2449 or email her at ALayton@brpcam.com. www.brpcam.com

CLICK OR SCAN HERE TO DOWNLOAD BROCHURE:

IS YOUR HOA A BEST PRACTICE COMMUNITY?



Do your HOA residents (and potential home buyers) recognize the value associated with living in your “best practice” community?

CAI-CV’s Medallion Award Program provides an opportunity for CAI-CV member communities to be recognized for using CAI best practices.

BENEFITS TO YOUR HOA:

- Helps to build positive community spirit.
- Helps preserve and enhance the high-level character of your community.
- Helps to protect and enhance property values in your community.
- Helps the board and management exceed owners’ expectations.

YOU WILL RECEIVE:

- A professionally made outdoor Medallion Community logo sign that can be mounted to your gate or entrance.
- A professionally designed electronic logo that can be added to your website, business cards, and marketing materials.
- A cover-feature article in CAI-CV’s award-winning HOA Living Magazine


JOIN THE RANKS OF COACHELLA VALLEY MEDALLION COMMUNITIES!

- Desert Shores Resort, Indio
- Indian Ridge, Palm Desert
- Mira Vista at Mission Hills, Rancho Mirage
- Montage at Mission Hills, Cathedral City
- Palm Valley Country Club, Palm Desert
- Santa Rosa Cove, La Quinta
- Sun City Palm Desert
- Victoria Falls, Rancho Mirage

NEXT STEP:

Request an application
Click or Scan the QR Code



(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@cai-cv.org for more information.) 



BEACH BALL BOWLING

THANKS TO OUR SPONSORS

LANE SPONSORS

Asphalt MD's X2
Associa Desert Resort Management X3
EmpireWorks
Flood Response X2
Frazier Pest Control X2
Horizon Lighting
Hotwire Communications
Ivan's Painting
Lloyd Pest Control
Precision Roofing & Waterproofing
Pro Landscaping Inc.
RB Roofing LLC
Roof Asset Management
SCT Reserve Specialists
Solar Central Inc.
Sun King Electric X2
Vintage Landscape

GREETING SPONSORS

Coachella Valley Public Safety
Sherwin-Williams Paints

SIGNS SPONSOR

Signarama

STRIKE SPONSORS

Coachella Valley Public Safety
Epsten, APC
Hotwire Communications
Securitas Security Services

DESSERT SPONSOR

Precision Construction
& Painting

BOWLING SHOE SPONSOR

Dunn-Edwards Corporation

BAR SPONSORS

LaBarre/Oksnee
Insurance Agency
MC Builder Corp.
Teserra Outdoors

FOOD SPONSOR

Horizon Lighting

KOOZIE SPONSOR

Poppin Promotions

SECURITY SPONSOR

Securitas Security Services

LANE ASSIGNMENT SPONSOR

Pro Landscaping, Inc.

CAI-CV ANNUAL BOWLING TOURNAMENT FRIDAY, JULY 12, 2024, PALM SPRINGS LANES



CAI-CV ANNUAL BOWLING TOURNAMENT FRIDAY, JULY 12, 2024, PALM SPRINGS LANES



*In high school, Mike was caught digging a pool
behind the football field... by hand!
Today he remodels pools!
Was there ever any doubt?*

Remodeling pools and Backyards since 1969
Quality work at a fair price



Free Estimates
760-342-9756
GardnerRemodel.com



GARDNER
OUTDOOR AND
POOL REMODELING

TIME TO REMODEL?

Lic #896061 C-53

SAVE THE DATE



JOIN US UNDER THE STARS AT THE BEAUTIFUL PRO LANDSCAPING
NURSERY GARDENS FOR A FESTIVE EVENING

SIGN UP NOW! EARLY REGISTRATION ENDS SEPTEMBER 27TH!

\$28 for Managers & Homeowner Leaders
(Late Registration and Walk-ins \$40)

\$70 for Non-sponsor Business Partners
(Late Registration & Walk-ins \$100)

- Souvenir T-Shirts & Steins
- Axe Throwing
- Oktoberfiesta Games & Competition
- Locally Brewed Beers
- Fiesta Buffet
- Assorted Ice Cream Desserts

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."

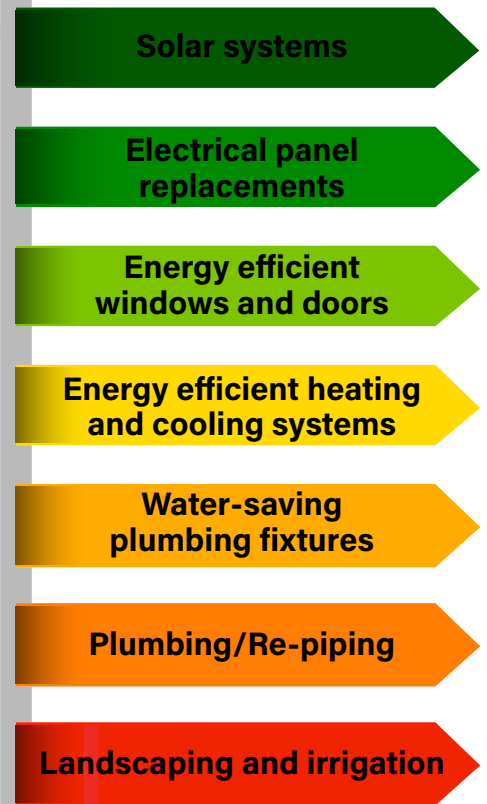
✓ Call upon your most trusted business partners and service providers when needed and necessary.

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.



ARCHITECTURAL, GOVERNMENTAL AND CODE-RELATED INFRASTRUCTURE COMPONENT UPGRADES

In reviewing your reserve study, knowing what might be needed in your community due to new laws and trends is important to keep in mind. Examples of major infrastructure systems or components that might need replacement due to age, emerging technologies or new governmental regulations are:



"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.



**READ
MORE**
CLICK OR
SCAN THE QR



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

Product Format: Book

Item #: 0758

Members-Only Sale: USD \$4.95

Members: USD \$8.95

Non-Members: USD \$14.95



**READ
MORE**
CLICK OR
SCAN THE QR



Friday, September 20, 2024, 11:15 a.m.
CAI-CV EDUCATIONAL PROGRAM & MINI TRADE SHOW

AGING INFRASTRUCTURE

GUEST SPEAKERS

Chris Sigler, B.S.C.E., CDT
President & CEO, C.L.
Sigler & Associates, Inc.



Jolen Zeroski, CMCA
Vice President & Regional Account
Executive, First Citizens Bank



[CLICK HERE OR SCAN QR CODE TO REGISTER](#)

Lunch and Trade Show Included
11:15 AM TO 1:30 PM

\$100 Business Partners

\$42 Managers

\$42 Homeowner Leaders

Sun City Palm Desert
38180 Del Webb Blvd.,
Palm Desert, CA 92211

LIMITED
CAPACITY



TRADE SHOW SPONSORS

Accurate Termite & Pest Control
Alliance Association Bank
C.L. Sigler & Associates
Cooper Coatings
EmpireWorks
Harvest Landscape
Hotwire Communications
McKenzie Mena, LLP
Tinnelly Law Group
Vintage Landscape
Vista Paint Corporation

HANDOUT SPONSOR

Precision Construction & Painting

CLAC SPONSOR

Delphi Law Group, LLP

SPONSORSHIPS AVAILABLE:

[CLICK OR SCAN QR CODE
FOR SPONSORSHIPS](#)



C

A

M

DAY

2024

Sun City Palm Desert

Community Association Manager Day

THANK YOU TO OUR SPONSORS

CAMDAY TRADE SHOW BOOTH SPONSORS

Banc of California
Brown & Brown
Canyon Print & Signs
C.L. Sigler & Associates
Coachella Valley Public Safety
EmpireWorks
Hidroklar, Sustainable Water Solutions
Hotwire Communications
Kevin Davis Insurance Services
Khatri International
Powerful Pest Management
Precision Construction & Painting
Precision Roofing & Waterproofing
RB Roofing LLC
Securitas Security Services
Southwest Landscape
Tinnelly Law Group
United Paving Co.
Vintage Landscape

SIGN SPONSOR
Canyon Print & Signs

REGISTRATION SPONSOR
Allied Universal

BREAKFAST SPONSOR

Epsten, APC

LUNCH SPONSORS

Enterprise Bank & Trust
Precision Construction & Painting

POWERPOINT SPONSORS

Accurate Termite & Pest Control
Associa Desert Resort Management

SCHOLARSHIP SPONSOR

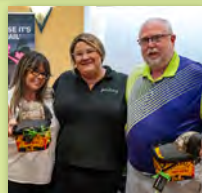
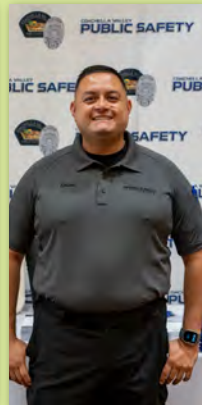
Golden Alliance Insurance

GRAND PRIZE SPONSOR

Sherwin-Williams Paints

BAR SPONSOR

Precision Roofing & Waterproofing Inc.



What Does “Security” Really Mean?

By Christopher Bair



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.

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.



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. 📖



COPIES ARE AVAILABLE VIA FREE DOWNLOAD. CLICK OR SCAN THE QR CODE



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.

Winter Wonderland

Enjoy an evening under the stars at Shields Date Garden.
Enjoy holiday shopping at the amazing silent auction and tour the
gardens while sipping on extraordinary wines and tequila!

Friday, December 6, 2024

5:30 p.m.

Shields Date Garden

80225 Hwy 111, Indio (Jefferson & 111)

Live & Silent Auction

More than \$10K of auction items!

Plan Your Holiday Shopping!

Golf Outings, Coach Purses, Gift Cards, Luxury Items,
Jewelry, Christmas Decor, & Much Much More!

\$45 Members & Nonmembers



ADMISSION INCLUDES

- Champagne Reception
- Wine & Tequila Tasting
- \$10,000 in Silent Auction Items
- Live Auction
- Shields' Finest Dinner–
Appetizers & Buffet
- Door Prizes & Grand Prize
- Self-guided Garden Tours

Community board members and managers receive a
discount for attending the board and manager education on
December 6th at 3:30 P.M. EDUCATION AND SIP & SHOTS FOR \$25



Thanks to our Sponsors

TITLE SPONSOR

Associa Desert Resort Management

WINE TASTING SPONSOR

Hotwire Communications

TEQUILA TASTING SPONSOR

Ivan's Painting & Maintenance

CHAMPAGNE SPONSOR

EmpireWorks

LIGHTING SPONSOR

Sun King Electric, Inc.

ENTERTAINMENT SPONSOR

Precision Construction & Painting

RESERVED TABLE SPONSORS

Associa Desert Resort Management

C.L. Sigler & Associates

Harvest Landscape

FOOD SPONSOR

LaBarre/Oksnee Insurance Agency

SILENT AUCTION SPONSOR

Fiore Racobs & Powers, A PLC

GRAND PRIZE SPONSOR

Delphi Law Group, LLP

COCKTAIL NAPKIN SPONSOR

Dunn-Edwards Corporation

CLAC SPONSOR

Epsten, APC

SCHOLARSHIP SPONSOR

NLB Consulting

SPONSORSHIPS



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. 🗳️

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@cai-cv.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](https://www.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**
- Brochures and Pins: Order by **Mail** or **Online** 📄



SCAN QR CODE
FOR ONLINE LINKS

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.

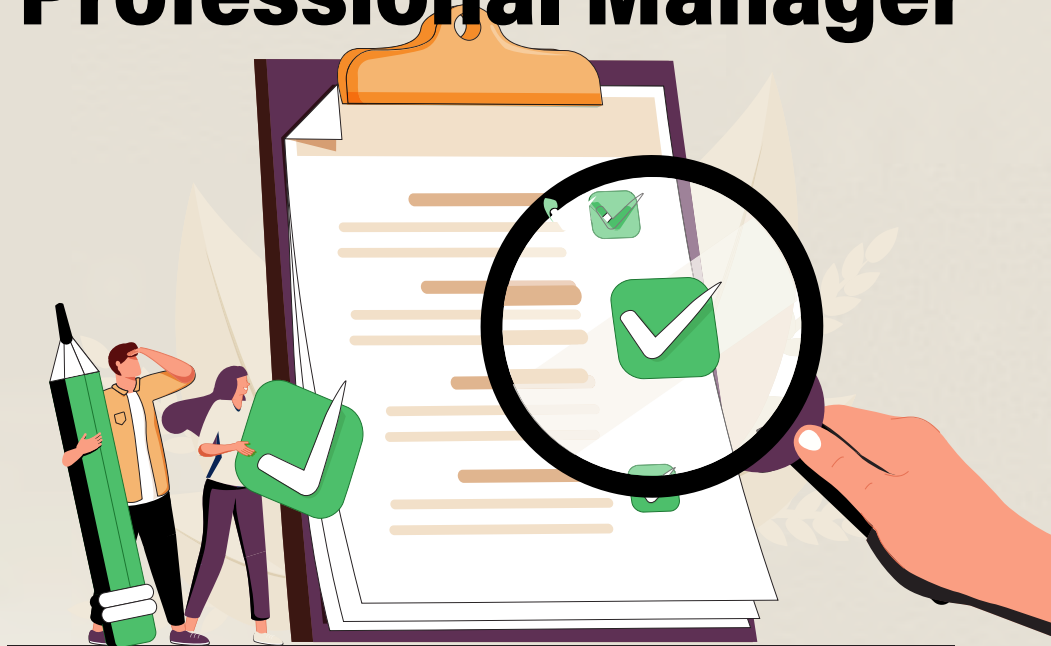
If anyone feels a CAI-designated professional has violated the code of ethics, a complaint may be submitted for review. Formal complaints are carefully reviewed, scrutinized, and considered according to a specific enforcement plan. Although some complaints are dismissed because

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."

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

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

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

"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

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.

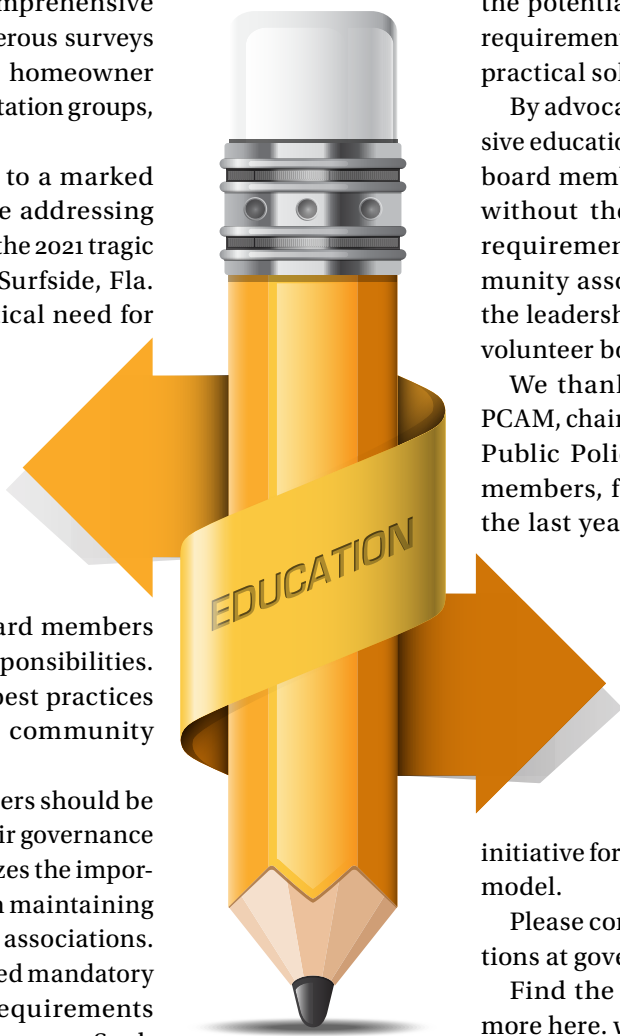
We thank Michael Johnson, CMCA, AMS, PCAM, chair of the CAI Board Member Education Public Policy Task Force, and all task force members, for their time and dedication over the last year and a half on this critical policy

"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 dbaum@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



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



REGISTRATION:
SPONSORSHIPS:



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 Oktoberfestia
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

FOR CAI NATIONAL EVENTS AT
CAIONLINE.ORG



2024 Marketing Plan

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

CORPORATE SPONSORS

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