SUMMER 2025

THE VOICE OF
THE CALIFORNIA
COMMUNITY
MANAGEMENT
INDUSTRY

Why Become an Accredited Community Management Company (ACMC)?

The Accredited Community Management Company (ACMC) program recognizes companies that meet the highest standards in managing California community associations.

Accreditation sets you apart as a trusted professional and signals to clients that your team upholds state-specific industry excellence. Benefits include:

- Increased credibility and trust with associations
- A competitive edge to grow your business
- Recognition as a leader in California
- A stronger, more knowledgeable management team

For more information on the benefits of ACMC accreditation, contact CACM's education department at certification@cacm.org.

Vision

THE VOICE OF THE CALIFORNIA COMMUNITY MANAGEMENT INDUSTRY

Summer 2025 • Vol. 34, no. 2

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Vision Magazine is released digitally by CACM four times annually to members, industry partners and supporters of the California Association of Community Managers.

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Do we know where you are?

Attention CACM members: Have you changed jobs or moved to a new location? Reach out to us at **communications@cacm.org** to update your profile so you don't miss your next Vision magazine or any other important CACM communications.

Follow us and stay up-to-date on industry news and info!

Follow @CACMchat

on the cover

Made for you and featuring you!
This year, our Spring Educational Forums were tailored to region-specific topics you and your peers asked for.
Check out the highlights on page 52!

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features

Is it just me, or is 2025 flying by faster than a summer Friday? Somehow, we've already hit July—and while the days might be longer, the year feels like it's racing toward the finish line. Hopefully, you're finding some time to relax, recharge and maybe even sneak in a beach day (or two).

This issue's theme, Finding Your Niche, couldn't be more fitting. Whether you've found your groove in portfolio management, love the rhythm of onsite life or specialize in high rise or large scale communities, your unique experience and expertise are what keep this industry strong. And speaking of carving out your place—have you ever considered taking that next step and serving on **CACM's Board of Directors**?

Nominations for our 2026 Board of Directors election are now open, and this is your chance to help shape the future of community management in California. If you're looking for a way to make a meaningful impact beyond your day-to-day role, this might be your perfect fit. Find the details and nomination form on our website—and don't wait too long, deadlines have a way of sneaking up faster than a heat wave in July.

Speaking of niche, we recently wrapped up our **Executive Leadership Summit** and **Spring Educational Forums**—events designed with you in mind, tailored to your role, your region and your specific challenges. We're grateful to everyone who joined us and helped make those experiences memorable, insightful and full of meaningful connections.

So, as we cruise through summer, take a moment to reflect on the niche you've carved out, and how you might grow it. Whether that's through leadership, mentorship or just showing up for your community in the best way you know how—we see you, and we're cheering you on.

Stay cool out there and we hope to see you at our events in the fall!

Respectfully,

Thomas Freeley, CAMEx, CCAM
CEO of CACM

Stephen Levine Celebrates One-Year Anniversary as Of Counsel at The Judge Law Firm

Congratulations to **Stephen M. Levine, Esq.** on marking his first year as Of Counsel at The **Judge Law Firm**! Stephen has provided invaluable legal guidance to numerous community associations, launched the firm's Free Board of Director Orientation Training, delivering over a dozen sessions via Zoom and contributing to the CACM Law Journal. Reflecting on his milestone, Stephen shared, "This past year has been fantastic. It has been an amazing time working with James Judge and The Judge Law Firm's talented and versatile legal team, providing for my clients' needs and assisting The Judge Firm in servicing their five hundred plus Southern California Association clients." Congratulations again Stephen!

Congratulations Carl Weise!

Congratulations to our Board Member, **Carl Weise, CAMEx, CCAM-HR. AA**! Carl has recently stepped into the role of General Manager at San Diego Country Estates Association, and we couldn't be more thrilled for him. We're excited to see all the great things he'll accomplish in this new chapter and wish him continued success on his career journey!

Congratulations StormWater Pros, LLC!

Congratulations to **Stormwater Pros, LLC**! The team was recently honored with the Operational Excellence Award from Whip Around, a digital software company specializing in fleet inspections and maintenance. This recognition highlights the innovative steps Stormwater Pros has taken to foster a culture of safety and compliance. Nice work, Stormwater Pros — we can't wait to see what else is in store for you. Congrats again!

Tim Flanagan Recognized by Super Lawyers for Fourth Consecutive Year

Congratulations to **Flanagan Law, APC**'s very own, Tim Flanagan, Esq. for being honored by Super Lawyers for the fourth year in a row! This prestigious distinction is awarded to only the top 5% of attorneys, highlighting Tim's consistent excellence and dedication to his profession. Being recognized by his peers reflects the high regard in which he is held within the legal community. Congratulations on this amazing accomplishment Tim! We look forward to seeing all that you will accomplish in 2025 and beyond!

Congratulations Ben Sloman!

Congratulations to **Ben Sloman, CAMEx, CCAM**, on his new role as President of **Associa Northern California**! With a strong background in leadership and years of dedicated service, we have no doubt Ben will make a lasting impression in this role. We're excited to see the positive impact he'll make in this new chapter and wish him continued success in his career journey!

Associa Northern California

Way to Go Scott Hubbard!

Congratulations to **Scott Hubbard** on his new role as Regional Vice President at Associa! With six years at the company and a track record of leadership in several executive positions within their Northern California branch, his experience and dedication have equipped him well for this high-level position. We're excited to see all he'll accomplish in this next chapter and wish him continued success in his journey!

Brandon Kanner Passes California Bar, Joins Ranks of Admitted Attorneys

Riley Pasek Canty Seltzer LLP is proud to announce that **Brandon Kanner** has officially passed the California Bar Exam and is now a licensed attorney. Kanner joined the firm in 2023 as a law clerk and quickly distinguished himself through his dedication, strong work ethic and keen legal insight. The firm stated, "We're thrilled to celebrate this exciting milestone with him and look forward to seeing all that he'll accomplish as a practicing attorney." Congratulations Brandon, we can't wait to see what this new chapter holds in store for you!

Steven Schinhofen Ties the Knot: A Joyous New Chapter Begins

Congratulations to **Harvest Landscape Enterprises, Inc**'s CEO, **Steven Schinhofen**, on his marriage to his wife, Cinthya, earlier this year! The team at Harvest shared the joyous news on social media, saying, "We are thrilled to celebrate a joyous milestone for our incredible leaders as they embark on this beautiful new chapter together! Wish you both a lifetime of love, happiness, and adventure." Wishing Steven and Cinthya all the best as they begin this exciting new journey together!

Sequoia Construction Services, LLC has Moved

Sequoia Construction Services, LLC has a new home! The team recently announced their move to a corporate office in Pleasant Hill, sharing their excitement on social media. They highlighted that this new location will make it easier than ever to connect and collaborate. "Our new space reflects our continued growth and our commitment to providing exceptional service and innovative solutions." You can now find them at 3266 Buskirk Ave, Suite 200, Pleasant Hill, CA 94523. Congrats on the big move, Sequoia!

A New ACMC Accreditation is in the House

Congratulations to **Fairmate Inc DBA Real Property Management Fairmate**, based in West Covina, CA, who has proudly earned the Accredited Community Management Company (ACMC) designation. This esteemed certification acknowledges companies that uphold the highest state-specific standards for professional business practices in managing associations, which includes comprehensive risk management, education and insurance requirements.

Now Serving NorCal: The Judge Law Firm Opens Second Office

Exciting news from **The Judge Law Firm**! In late April, the firm announced the opening of their second location in Northern California. Congratulations to the entire team on this exciting expansion—we can't wait to see what's ahead for you in NorCal! The new office is located at 9245 Laguna Springs Drive, Suite 200, Elk Grove, CA 95758.


Lorena Sterling

A Big Promotion Worth Celebrating

Please join us in congratulating **Lorena Sterling, CAFM**, on her promotion from Controller to Owner of Community Association Financial Services, LLC. Lorena is a part of our Vision Magazine Committee and her hard work and leadership have made a lasting impact. This next step at CAFS is well deserved. Way to go, Lorena—we're thrilled to see what's next!

DeNichilo Law, APC Announces Director of Client Relations

DeNichilo Law, APC has welcomed **Janine Stratton** as its new Director of Client Relations. With over 15 years of experience in HOA portfolio and onsite management, Stratton brings a strong client-focused perspective and deep industry insight to the role. The team at DeNichilo Law, APC stated, "We are confident that Janine will be a tremendous asset to our team and a trusted resource for clients." Welcome to the team, Janine, and congratulations on this new role!


Janine Stratton


Tatiana Jae

Milestone Moment: Tatiana Jae Celebrates 4 Years at Roseman Law, APC

Congratulations to **Tatiana Jae** on her 4-year anniversary at **Roseman Law, APC**! The team shared their appreciation, stating, "As one of our amazing marketing team members, her creativity, dedication, and professionalism have made a lasting impact. We're grateful for all that she brings to the firm and look forward to continued success together." Here's to this milestone and many more to come—congrats, Tatiana!

Celebrating 18 Years of Service: Karyn A. Larko

Karyn A. Larko is celebrating 18 years with **Epsten, APC**—a remarkable milestone that highlights her longstanding dedication and impact within the firm. The team at Epsten took to social media to recognize the occasion, stating, "Karyn is a key member of the firm's transactional department, and we are proud to have her on our team!" In addition to her work at the firm, Karyn has contributed her expertise as a member of CACM's Law Journal Committee in years past and remains an active writer for the publication each quarter. Congratulations, Karyn, on this incredible achievement!

CAFS Has a New Home

Community Association Financial Services, LLC has officially moved! While they continue to serve the Palm Springs area with the same dedication, you can now find them at their new location: 41610 Indian Trail, Suite 3, Rancho Mirage, CA 92270.
Cheers to fresh beginnings and continued success in their new space!

Cheers to Daniela Cruz on Her New Role at Pilot Painting & Construction!

Join us in congratulating **Daniela Cruz, CCIP**, on her new role as Sales Business Developer for Orange County at **Pilot Painting & Construction**! Daniela took to social media to announce this next step in her career, stating that she's "thrilled to be part of such an incredible team" and ready to "absolutely crush it alongside the amazing Pilot crew and the one and only Allison Lewis." Wishing you all the best in this exciting new chapter, Daniela!

roundtable

A MESSAGE FROM THE BOARD

2025 has started off as a blur and continues to pick up speed with all the opportunities that continue to face our industry. This edition of the Vision Magazine includes a lot of great information addressing many of the opportunities for your review.

Not everyone grew up in our industry or even knew that you could have a successful career in the Common Interest Development (CID) industry. This industry offers a dynamic and rewarding career path, but finding your niche is crucial for long-term success. Whether you're a property manager, an onsite professional, valued business partner, understanding your role and optimizing your approach can make a significant impact.

CID professionals thrive when they can identify their strengths and align them with industry needs. Whether it's specializing in high-rise communities, resort properties or active-adult neighborhoods, honing expertise ensures professionals stand out and add real value to their associations and companies.

CACM offers many specialty certifications that can aid you in finding that niche. There is also one of my favorite engagement opportunities at the High Rise & Large-Scale Summit that rotates back and forth between Northern and Southern California. Last year it was at the beautiful Tommy Bahama Miramonte Resort and Spa in the Desert and this year it is Walnut Creek at the Renaissance Walnut Creek Hotel. It is a true opportunity to interact and engage with peers that can give you additional insight and perspective for future decisions including career goals.

One other item that I feel needs to be emphasized in this Vision issue- is the importance of legislative action. Legislation directly impacts CID communities, from housing regulations to financial governance. Our members should stay informed and advocate for policies that benefit our industry for sustainability. Engaging with local legislators and participating in industry discussions helps shape the future of the CID industry. There is a piece of legislature that everyone should be aware of at this time – AB 739 referred to as the manager licensing bill. It was killed in 2025 but it is a two-year bill so it will be returning in 2026 with additional force for it to be approved. This is a focus for all of us as it will change the way we operate and reduce the number of manager candidates due to the additional restraints proposed by the California Association of Realtors.

CACM and the Board of Directors are working hard to represent the community managers and management companies against this option – please follow and support the efforts!

Reminder that if you want to serve on the board of directors for CACM the time is just around the corner to submit your applications.

And as always remember to embrace the journey, trust the process and never stop learning!

Joe Price, CAMEx, CCAM
CACM Board Chair

HIGH RISE & LARGE SCALE SUMMIT

CACM | 2025

RENAISSANCE WALNUT CREEK HOTEL | WALNUT CREEK, CA
SEPTEMBER 25-26, 2025

Connect with fellow managers from across California who specialize in high-rise and large-scale communities at this two-day summit. Take a deep dive into your area of expertise, address challenges specific to your role, and collaborate with experienced professionals to exchange ideas and practical approaches.

BOOK YOUR GROUP RATE

RESERVATION PHONE: 1.888.236.2427

CCAM, CAFM, MCAM and CCIP members in recertification earn 6 CEUs.

PARKING: *$15.00 per car, per day. Discounted from $25.00*

SUMMIT PRICING

	MANAGER MEMBER	NON-MEMBER***
EARLY*	$399	$499
REGULAR**	$499	$699

*Regular is 30 days prior to event.
**Early is more than 30 days prior to event.
***Online registration is available only to CACM members. Non-Members please call the CACM office to register at 949-916-2226 or email registration@cacm.org.

REGISTER HIGH RISE **REGISTER LARGE SCALE**

HAVE QUESTIONS ABOUT THE EVENT? CONTACT EVENTS@CACM.ORG.

Follow @CACMchat

Our Green Team had a fantastic day at CACM Day at the Races in Santa Anita Park! It was a pleasure to sponsor this event and soak in the beauty of the track alongside our property management partners. The day kicked off on a high note with Hudson's Ridge securing victory in Race #1, a special moment in honor of my grandson, Hudson.♡ A big thank you to Jessica Oakes for her valuable expertise and helpful contributions throughout the event! ♡

#Staygreen #CACM #Dayattheraces #partnerships

– Heidi Van Syoc, Stay Green, Inc.

Thank you, ***CACM***, for having us at the Spring Forum! We enjoyed diving into all things electronic voting and connecting with the incredible Orange County community. It was a pleasure helping set your managers up for success!"

– Richardson | Ober LLP

What a Great Day at ***CACM's*** "Day @ the Races" at the Beautiful Santa Anita Race Track. It was a Pleasure for ***Valley Bank*** to co-sponsor this event! Special shout out to ***Jessica Oakes*** from ***Seabreeze Management Company, Inc.*** for educating us all on how to place our bets It was so wonderful to see all of our Property Management Partners & a BIG THANK YOU to ***Melissa Hurtado*** & ***Lori Santillan*** for a fantastic production!

#ValleyBank #CACM #Day@theRaces #networking

– Mike Davie, Valley National Bank

"It was a pleasure speaking at the ***CACM*** Inland Empire Spring Educational Forum and discussing all things Electronic Voting. Not only was it a great topic, but it was also fun to be a part of such a great group! So glad I could share the floor with ***Noah Jackson, MS*** of ***Third Party Voting*** and with ***William Curry*** of ***Whitney | Petchul***.

– Victoria Gish, CCAM, Keystone Pacific Property Management

"It was great to attend the ***CACM*** Executive Retreat! The sessions were insightful, and the networking opportunities were invaluable. **#Leadership #Networking #CACMRetreat #KPPM**

– Matthew Williams, Keystone Pacific Property Management

Grateful for the opportunity to connect, learn, and collaborate with fellow leaders at the ***CACM*** Executive Leadership Summit. Inspired by the conversations and insights shared – now it's time to put that momentum into action and continue driving growth and efficiency at NextStep!

– Adriana DaSilva, CCAM, Next Step Community Management

Thank you ***CACM*** for a great week of Spring forums. First on Tuesday in the Inland Empire and today in San Diego. Always great to make new connections as well as reconnect with past contacts. Looking forward to the next event! **#CACM #network #connecting #buildingrelationships**

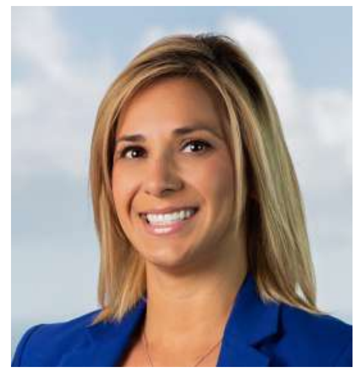
– Albert Lopez, Heritage Bank of Commerce

Great discussion today in the IE today with ***CACM***, ***Victoria Gish*** and ***William Curry.*** Very grateful for the opportunity to educate property managers about the positives of electronic voting.

– Noah Jackson, Third Party Voting

Yesterday was yet another "getting out of my comfort zone" day! My second time doing a presentation for CACM. "The Impact of Mergers & Acquisitions for Independent Management Companies… Thank you being so supportive. And the ***CACM*** staff thank you for pushing me out of my comfort zone.😌

– Laura Hurtado, CCAM-PM.CI, Synergy Management Group



Yesterday I was grateful to take time out of my busy schedule and volunteer at the ***CACM*** East Bay community service event supporting the amazing organization ***Kids Against Hunger***. I was touched and humbled by the philanthropic work they do in providing millions of nutritious meals to starving humans throughout the world. I appreciate the generosity of ***CalPro Construction & Painting*** to support and sponsor this event as well as the huge turnout of managers. This was an awesome networking event and I'm thankful to have been a part of it! Thank you ***Natasha Fierro*** for putting this together! ♡

#Leadership #Networking #CACMRetreat #KPPM

– Anna Dizon, CCIP, CalPro Construction & Painting

Truly a rewarding experience at the Kids Against Hunger event. Packing food with an incredible group of people, all working toward a greater cause. I'm grateful to be part of something that makes a real difference! Thank you to our wonderful sponsors, ***CACM***, and ***Natasha Fierro*** 😊

– Homeowners Management CO., LLC

YOUR INVOLVEMENT, OUR PROGRESS:

MID-YEAR EDUCATION HIGHLIGHT

As we move into the second half of 2025, we want to take a moment to share some updates in our education department. It's been a busy season, with committees hard at work, fall events taking shape and new opportunities for members to get involved and stay engaged.

Our committees continue to play a vital role in shaping the direction of our educational programming, event planning and legislative efforts. From guiding the development of educational courses to elevating our certification program by participating in accreditation-specific committees and supporting major events, their contributions ensure CACM content remain timely, relevant and reflective of the everyday challenges managers face.

Supporting the Work Behind the Scenes: CACM Committees

Our committees are made up of dedicated professionals who bring real-world experience and valuable insight into every conversation. Here's a quick look at each one:

Accreditation Committees

This multi-committee is composed of Subject Matter Experts guiding the development of our certification exam. Each group focuses on core tasks such as question writing, exam assembly or standard setting—to ensure a fair and reliable assessment.

Legislative Committee

This committee offers input as CACM develops positions on proposed legislation. Their feedback helps ensure the voice of community managers is represented in policy conversations at the state level.

Education Advisory Committee

Currently supporting a major curriculum review, this team is helping ensure our courses align with current best practices, legislative changes and evolving industry needs. We're actively welcoming new members who want to be part of this important initiative.

Law Seminar Committee

With this year's Law Seminars wrapped up, we want to thank the committee for guiding content development, coordinating sessions and moderating impactful discussions. Their leadership continues to make this signature event a success.

Coming Up: Fall Educational Events

Planning is underway for two major fall events designed to help managers stay informed, earn CEUs and connect with peers:

Fall Educational Forums

These breakfast or lunch events are tailored to address region-specific topics and local industry trends. Each forum is designed to spark dialogue, provide practical insights and offer valuable face time with other professionals in your area. Though it is a few months away, now is a great time to sign up and mark your calendars for an event that will elevate your management style before the year ends.

High Rise & Large Scale Summit

This two-day summit is for managers working in high-rise and large-scale communities. It's an opportunity to take a deep dive into specialized topics, collaborate with fellow experts and leave with strategies you can put into practice. This year, it will be held in Walnut Creek, take this as a sign to sign up for two days of dedicated workshops and sessions with like-minded managers.

Member Support Webinar

In addition to our educational programming, we'll be hosting an upcoming Member Support Webinar designed to help members—both new and seasoned—make the most of everything CACM offers. Though our first one will take place in the coming weeks, we foresee this webinar to be a continued resource for our members and have plans to make this opportunity available quarterly.

This interactive session will walk you through the benefits included in your membership, highlight underused resources, navigate the Education Center with ease, and give you the chance to ask questions directly. Whether you're just getting started or need a refresher, this webinar is a great opportunity to stay connected and informed.

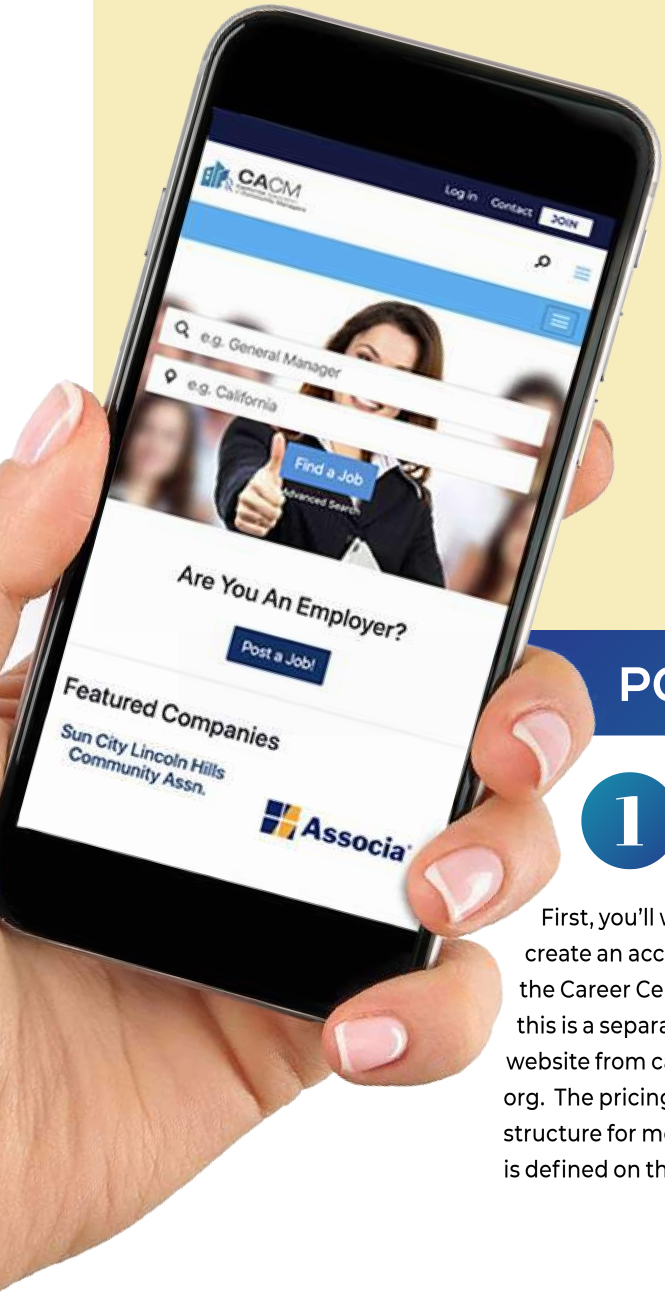
We appreciate the continued engagement of our members and volunteers, and we look forward to seeing many of you at upcoming events or in one of our committees. Your involvement helps keep our educational standards strong and ensures that CACM remains a trusted resource for California's community managers.

2025 Course Catalog Available

The 2025 Professional Development Catalog was released in January. Use this professional development guide to plan for certification, re-certification or specialty designations in 2025. Every CACM course is included, as well as credits obtained, pricing and dates the course is offered. The catalog also explains each certification offered and the steps to attaining and maintaining it. **Download it now.**

ARE YOU LOOKING TO HIRE?

Let CACM help you!



CACM is committed to our members' professional success. Whether you are hiring or looking for the next industry-specific position, the Career Center is your "go-to" resource. Bookmark the Career Center and visit often.

Jobs can be posted for 30 or 60 days and are optimized for mobile and SEO. Premium and enhanced posts include increased visibility.

On top of posting your job opening, CACM delivers new job posts directly into email inboxes through its monthly Job Watch email and in its monthly MyCommunity member newsletter – both are sent to all of CACM's members.

JOB WATCH MONTHLY EMAILS:
Average open rate: 33%;
Average click through rate: 7%

POSTING YOUR JOB IS AS EASY AS:

1

First, you'll want to create an account in the Career Center, as this is a separate website from cacm.org. The pricing structure for members is defined on this page.

2

Please ensure you select your membership type before purchasing (we want to make sure you receive your discount!). You'll also find there is a live chat feature on the page. Those individuals are ready to assist you with any questions you have in real time.

3

If, after this, you still need assistance, please feel free to reach out to help@webscribble.com, and a representative from the company that supports CACM's Career Center will further assist you in answering your questions and assisting you with your posting.

CAREERS.CACM.ORG

achieving professional excellence

Congratulations Managers & Industry Partners

It is with great pride that we recognize managers, and now industry partners, who have taken the next step in their professional career by pursuing advanced educational opportunities. Congratulations to our newest Master of Community Association Management (MCAM), Certified Community Association Managers (CCAM), Certified Community Association Financial Manager (CAFM), California Certified Industry Partner (CCIP) and Specialty Certificate recipients for the period of January 31st to May 19th, 2025.

MCAM
Maria Hernandez, MCAM, CCAM-PM

AGE RESTRICTED ACTIVE ADULT (AA)
Jessica L. Melvin, CCAM-ND.AA.LM

CAFM
Susan Cook, CCAM, CAFM
Kimberley Flickner, CAMEx, CCAM-PM.LS.ND.AA.CID.LM, CAFM
Amanda Gotelli, CAFM
Elias Guzman, CCAM, CAFM
Jaime C. Haddad, CCAM, CAFM
Michelle Henderson, CAFM
Wendy Lau, CCAM, CAFM
Peter Shahinian, CCAM-LS, CAFM
Justin Yablonski, CAFM

CCAM
Monica Alvarado, CCAM
Brad Bacome, CCAM
Timothy Brilla, CCAM
Nathalie M. Camara, CCAM
Chanpheareak Chim, CCAM
Susan Cook, CCAM, CAFM
David Cuadro, CCAM
Vincent D'Amato, CCAM
Brei Davis, CCAM
Danielle DuBois, CCAM
Saif Ghanchi, CCAM
Eduardo Gonzalez, CCAM
Maria D. Gonzalez, CCAM
Rosie Gonzalez, CCAM
Lori M. Graham, CCAM
Lina Kawaguchi, CCAM
Taz Khaira, CCAM
Amaya G. Lopez, CCAM
Geraldine Manzo, CCAM
Jamie A. Marzion, CCAM
Jammie A. Mckrell, CCAM
Melissa Medina, CCAM
Melanie Merlin-Moats, CCAM
April M. Miller, CCAM
Yessenia Munoz, CCAM
Ayleen Ortiz, CCAM
Berkleigh M. Perser, CCAM
Christopher M. Rainey-Felley, CCAM
Marc A. Raymond, CCAM
Brian Remigio, CCAM
Monica Roe, CCAM
Joseph B. Rosenthal, CAFM, CCAM-PM
Kane Silverberg, CCAM
Kaylee Silverberg, CCAM
Sam D. Tcharkhutian, CAFM, CCAM-PM
Kenneth L. Toler, CCAM
Jordan L. Tuituku, CCAM
Angelita R. Villanueva, CCAM
Shannon R. Waddill, CCAM
Deana Walk, CCAM
Jill Walsh, CCAM
Nicholas A. Wilson, CCAM

CCIP
Brian Henry, CCIP
Kevin Reid, CCIP
Gina Roldan, CCIP

HIGH RISE (HR)
Daniel Khamudis, CCAM-HR.ND

COMMERCIAL & INDUSTRIAL CID MANAGEMENT (CI)
Tyler J. Matheis, CAMEx, CCAM-PM.LM.AA.CI, CAFM
Sajid Shabber, CCAM-HR.LS.ND.PM.AA.LM.CI, CAFM

LARGE SCALE (LS)
Jeff D. Couwenhoven, CCAM-ND.PM.LS
Tiffany Cribbs, CCAM-LS
Dawn Jaeger, CAMEx, CCAM-LS
Ginger Karl, CCAM-LS, CAFM

LIFESTYLE MANAGEMENT (LM)
Jessica L. Melvin, CCAM-ND.AA.LM

NEW DEVELOPMENT (ND)
Daniel Khamudis, CCAM-HR.ND
Jessica L. Melvin, CCAM-ND.AA.LM
Laurel Sylvanus, CCAM-ND

PORTFOLIO MANAGEMENT (PM)
Menalyn Cornejo, CCAM-HR.PM
Joseph B. Rosenthal, CAFM, CCAM-PM
Sam D. Tcharkhutian, CAFM, CCAM-PM

HIGH STAKES AND HARD FIGHTS

2025 Legislative Session Hits Midpoint

By Jennifer Wada, Esq.

We are just over halfway through the 2025 legislative session and already this session has proven to be one of the busiest for the industry in recent memory. Not only were a significant number of CID bills introduced, but many of them are high stakes and focus specifically on the management industry.

The most important and concerning piece of legislation introduced this year was ***AB 739 by Assemblymember Cory Jackson (AD 60 - Riverside County: Moreno Valley, San Jacinto, Perris, Hemet).*** This bill would require a managing agent of a CID to hold a real estate broker license issued by the state. The bill was brought to the author by a constituent but also involved engagement from the realtor industry. The stated intent of the bill was to get document fees under control, as well as to improve consumer protections and oversight of an "unregulated management industry." The proponents' concern is what they perceive as a lack of fiduciary duty between the manager and the homeowner, and they indicate that under current law, if a manager does something wrong, homeowners have no recourse other than suing the association, which is essentially like suing themselves.

CACM aggressively opposed ***AB 739***. We had extensive meetings with the author, sponsor, the CA Association of Realtors, the Department of Real Estate, relevant policy committees and legislators. While we agree with the need to ensure proper oversight and the highest degree of ethics and professionalism in the industry, AB 739 would do the opposite – prevent trained managers from joining or staying in the profession and severely degrade the level of education and experience necessary to manage communities – all to the detriment of homeowners.

I am pleased to say that our advocacy against this ill-conceived proposal, along with the obvious burdens on the DRE, resulted in the bill stalling for this year. However, the author has already announced his intention to resume the bill next year. So, while we can declare success this year, it is critical that we do not rest on our laurels. The time has come to be proactive in establishing the community management industry as a critical player in the housing landscape. We must ensure that any regulatory efforts do not impose unnecessary burdens on managers and undermine the level of education and expertise necessary to assist homeowner associations throughout the state. CACM will be working hard on this issue in anticipation of a tough political battle in 2026.

CACM has also been working on other important pieces of legislation.

AB 21
DeMaio: Homeowner Association Accountability and Transparency Act of 2025

This bill was an assault on homeowner associations on many fronts and included things like requiring individual notice in the place of general notice, requiring litigation to be announced by the board along with the court and case number, requiring meetings to be recorded, and awarding a member attorney's fees for consulting an attorney in small claims, among other things. CACM opposed this measure along with CAI and we were successful in killing the bill.

SB 31
McNerney: Recycled Water

This bill would require associations to use recycled water for common areas. CACM expressed concerns for those associations that aren't currently plumbed for recycled water and the cost of installing such plumbing. The author ultimately agreed to remove the requirement, and the bill now clarifies that common areas that don't enter residential boundaries don't have to have dual plumbing. In other words, if associations want to use recycled water in common areas, they are not required to have dual plumbing for those areas.

SB 410
Grayson: Balcony Inspection Report

This bill is sponsored by the CA Association of Realtors and adds the balcony inspection report to the list of disclosure documents. One of the reasons cited by the sponsor for this bill was that managers are refusing to conduct inspections and/or provide inspection reports. While we are unaware that this is a common occurrence, CACM agrees that such inspections should be provided and is neutral on this bill.

SB 625
Wahab: Disasters: Housing Reconstruction

This bill is intended to address emergency situations like the LA wildfires and voids any CC&Rs to the extent they prohibit or effectively prohibit substantially similar reconstruction of a residential structure damaged or destroyed in a disaster. The bill also requires expedited architectural review in these situations. While the bill did not attach the expedited review to emergency situations, we understand the bill will be amended to do so.

SB 681
Wahab: Housing Affordability: HOA Fine Caps

This is the Senate housing affordability package and includes a variety of proposals. Relevant to managers is the provision that caps governing document fines to $100 per violation. CACM and CAI are strongly opposed to this provision and are currently in discussions with the Legislature advocating for its removal.

SB 770
Allen: EV Charging Stations

This bill removes the provision requiring owners, when they install an EV charger in common area, to name the association as an additional insured on their insurance policy. Negotiations are ongoing on this measure and CACM is monitoring it as it moves through the process.

The coming months will continue to be action packed as we race to the finish. The Legislature adjourns on September 12th, and the Governor has until October 12th to sign or veto bills.

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

Why Your Voice Matters in California

As community managers in California, we're experts in the complexity of running the associations we manage. Between navigating Davis-Stirling compliance, managing budgets amid rising insurance premiums and ensuring reserve funding meets the state's growing standards, our daily responsibilities are already significant.

But while we manage today's needs, new legislation is quietly being proposed that could dramatically change how we operate tomorrow. Bills relating to reserve study timelines, manager licensing, HOA transparency requirements and even how meetings are noticed and held are being introduced in Sacramento every legislative cycle. As of April, at least 9 bills are pending during this legislative cycle that could impact how we work with our communities in the future.

Being aware of these proposals is critical. **Taking action** is even more important. In California, where thousands of bills are introduced each session, lawmakers must hear directly from industry professionals like us to fully understand the real-world consequences of their decisions.

WHY YOUR VOICE AS A CALIFORNIA COMMUNITY MANAGER MATTERS

There's a misconception that calling or emailing a legislator has little impact. The truth is, California lawmakers want and need our input, especially when it comes to specialized industries like CIDs.

When you reach out via social media, email or a phone call:

★ **You make the issue real.**
Legislators are often not familiar with the daily realities of managing a 500-unit HOA or navigating SB326 inspection requirements. Your voice adds essential context.

★ **You educate policymakers.**
By explaining how proposed laws affect budgets, insurance premiums, and community services, you help them avoid unintended harm.

★ **You build credibility.**
Consistent, respectful engagement makes you a trusted resource—and legislators remember the professionals who help them make informed decisions.

In California, where legislation can move fast and set national precedents, your advocacy is even more powerful.

THE CALIFORNIA CHALLENGE: A SURGE OF NEW BILLS

This year alone, dozens of bills were introduced that impact CIDs, from amending the Davis-Stirling Act to proposals expanding disclosures and changing financial reporting requirements. Some initiatives are positive; others, though well-intentioned, could create costly or impractical obligations for associations and their managers.

If we don't engage, laws may be passed without real-world feedback—and our communities will be the ones left struggling with compliance and additional costs.

HOW YOU CAN TAKE ACTION

★ **Monitor Legislation**
Stay connected to updates from CACM. They summarize bills and provide guidance regularly and through a variety of channels.

★ **Know Your Representatives**
Identify your State Assemblymember and Senator. California's legislative website makes it easy to find your district's contacts. Invite your local representative to an upcoming community event or company event. It gives them the opportunity to meet with dozens of constituents at once.

★ **Make the Call**
When an important bill is up for discussion, call or email your representative's office. Be concise, respectful and clear about the impact.

★ **Share Real Stories**
Briefly explain how proposed legislation would affect your communities—cost increases, operational challenges or better outcomes.

★ **Engage Your Boards**
Encourage HOA board members and homeowners to join advocacy efforts. A united front makes a strong impression. Sharing a call-to-action email with your board members gets them involved and engaged before they have to deal with the fallout of bad legislation and its consequences on their community. As an added bonus, it gives them a voice in the process and someone to direct their focus at over these bills – besides their manager!

★ **Support Industry Advocacy**
CACM is doing crucial work at the Capitol. Support their initiatives financially and through volunteer involvement whenever possible. If you have the time and opportunity to go and speak on behalf of our industry to one of the committees or the legislature as they are reviewing the bill, this can make a significant difference.

As California community managers, we already juggle a unique and challenging environment. We can't afford to sit on the sidelines when it comes to legislation. The future of our profession—and the strength of the communities we serve—depends on how engaged we are today.

Be proactive. Speak up. Your voice matters — and in California, it can truly change the course of legislation.

Together, we can protect and improve our industry for the next generation of managers and board members.

STAND WITH CACM

As California's leading voice for community managers, CACM is actively engaged in monitoring, influencing and shaping legislation that impacts our industry. But our strength depends on the participation of every community manager across the state.

Here's how you can take action today:

★ Stay informed through CACM's Legislative Updates and Advocacy Alerts.

★ Participate in CACM's annual Law Seminar & Expo to stay ahead of upcoming changes.

★ Join CACM's grassroots advocacy efforts—your voice amplifies our collective influence.

★ Build relationships with your local and state representatives and advocate for smart, informed legislation.

★ Support CACM's Political Action Committee (PAC) to help elect officials who understand and support the CID industry.

Don't wait for laws to happen to you—be part of the movement shaping the future of community management in California.

Together, through CACM, we can make a real and lasting impact.

WE ARE LIVE!

CACM'S FIRST EVER PODCAST IS HERE

In the fall of 2024, we took an exciting leap into the world of podcasting! Our first podcast, CACMCHAT: The HOA Life, is growing rapidly, with over 1,500 downloads and 21 episodes—and counting!

This bi-weekly podcast is designed for anyone involved or interested in community associations. We dive into real-life stories, industry trends and best practices from professionals working in California's community association management sector. No topic is off-limits!

Some of our most popular episodes explore key topics like reducing burnout, reserve management tips, mental health and more. Our host and CEO, Tom Freeley, shares that the podcast's main goal is to elevate the industry and shed light on *"the reality behind community association management and what a manager actually goes through on a day-to-day basis."*

Episodes also tackle evolving HOA laws, emerging technologies and the changing workforce. Plus, expert guests join us to provide insights and guidance on these pressing topics.

One enthusiastic listener shared:

> *"They've already had some incredible guests, and I'm eager to see what's next. If you manage an HOA, you must subscribe. Heck, if you LIVE in an HOA, subscribe! Better yet, if you're curious about what's happening behind the scenes in California communities, I highly recommend this podcast."*

You can tune in and stream CACMCHAT: The HOA Life on Spotify and Apple Podcasts.

Subscribe directly from our website, where you can also submit questions and topic ideas at podcast@cacm.org. If you haven't tuned in yet, now's the time—listen and subscribe today!

Apple Podcasts

Spotify

maintaining high standards

New Individual Manager & Management Company Members

CACM members further their success in the industry and benefit by partnering with colleagues to share new ideas and best practices. Please join us in welcoming these new members from the first quarter of 2025 (January 1-March 31.)

MANAGER ProPLUS

Samantha Anderson
Damian Bennett
Henry Postma
John Rivera
Francesca Sanchez
Reina White

MANAGER Pro

Monica Alvarado, CCAM
Kellie Anderson
Carlos Andrade
Antonio Ayala
Beatriz Borja
Alejandro Briones-Vega, CCAM
Kerri Brown
Victoria Brown
Cristina Candelori
Rebecca Castro
Daisy Ceja
Andy Chen
Oshin Chigani
Amanda Cox
Anne Crutchfield
Noe Lares Cruz, CCAM
Lani Diagbel, CCAM
Larry Dobson
Danielle DuBois, CCAM
Brian Engel
Marrichrist Evangelista
Jason Ewals
Janet Figueroa
Michael Finnie
Patricia Fitterer, CCAM
Jennifer Fontana
Jacqulyn Gaiter
Alvaro Garcia
Cassandra Garcia
Juliana Garcia, CCAM
Saif Ghanchi, CCAM
Annais Gonella
Claudia Gonzalez, CCAM
Eduardo Gonzalez, CCAM
Nichole Gooch
Deborah Graffam
Hilary Gruendle
Angelique Gutierrez
Kristen Hargrave
Joe Hedges
Emily Hemphill
Michelle Henderson
Emmanuel Hernandez
Raymond Holcombe
Sabrina Italia
Michael Jerry
Evelyn Juarez
Mark Kahn
Robert Kilian
Andrew Kucera
Desiree Kupiec
Jacqueline Landeros
Jessie LaPonzina
Tracy Lennox
Jessica Lichenstein
Alexander Lolas
Amaya Lopez, CCAM
Gloria Lopez
Jaimie Lopez
Shannon Lothringer
Sheila Malekzadeh
Bryant Marin
Seantell Marron
Simesha McDonald
Jammie Mckrell, CCAM
Judi McMahon
David Melaugh
Abigail Mian
Simone Mitchell
Isaac Monroe, CCAM
Erin Moore
Cristina Munteanu
Brandon Najjar
Kimberly Nakata
Cheryl Olsen
Ayleen Ortiz, CCAM
Ronald Parson
Ross Paulino, CCAM
Denise Paz
Lori Poulsen
Mario Quintero
Brian Remigio, CCAM
Rosaura Reyes
Edelmira Robles La Rose
Krystina Romero
Tasha Romine
Jennifer Ruiz
Nicholas Saadi
Monica Sandoval
Olga Shubina
Ricardo Arizmendi Silva
John Sotomonte
Scott Styve
Louis Swanepoel
Gary Tang
Evangelina Taylor
Diana Torres
Melissa Tremaine
Joseph Tripi
Boris Troflianin
Angelita Villanueva, CCAM
Lanaia Villegas
ShawnMarie Ward
Zachary Wells
Brittany Wilke
Suzie Wilson
Heather Winn
Cierra Yeager

Business

Crummack Huseby Property Management, Inc.
Lake Forest I (949) 367-9430
http://www.ch-pm.com

Desert Horizons Owners Association
Indian Wells I (760) 340-5501
https://www.deserthorizons.org

First & Main Property Management
Napa I (707) 207-8100
https://www.firstandmainpm.com

Homeowner Association Management Services, Inc.
Concord I (408) 827-1162 Ext 104

Kelly Management Group, Inc.
Santee I (858) 321-6564
https://kellymanagementgroup.com

PMP Management LLC
San Francisco I (415) 908-1976
https://pmprollc.com

Professional Community Management – an Associa Company
Foothill Ranch I (800) 369-7260
https://www.pcminternet.com

Terra58 Management
Cameron Park I (279) 400-2294
https://terra58.com/

Valley Vista Properties
Clovis I (559) 294-7667
https://valleyvistaproperties.com

Vintage Group
Irvine I (855) 403-3852
https://www.vintagegroupre.com

FINDING Your Niche

INSIGHTS FROM SEASONED PROFESSIONALS ON BUILDING YOUR IDENTITY IN THIS INDUSTRY

The word "management" is one of the most broadly applied terms in the professional world. There are managers for finances, manufacturing, sales and nearly every industry imaginable. A simple search for "management" on LinkedIn yields an overwhelming number of job opportunities across various fields. However, for those of us reading this article, we belong to a specific subset: Community Association Managers. Our role encompasses leadership, project oversight, accounting, conflict resolution and often, mentorship and training. The scope of our responsibilities is vast, requiring us to master multiple tasks and develop expertise across various disciplines.

How does one become a manager? Is it through education, experience or an innate skill set? While some may argue that formal education is necessary, others believe self-guided learning plays an essential role. There are individuals who effortlessly navigate daily responsibilities, while others struggle to juggle multiple demands. The question then arises: How do we refine our skills and define or find our niche in this profession?

To gain insight, I interviewed two Community Managers across different levels of management, representing both portfolio and on-site positions. Their responses provide valuable perspectives on the development of management styles and specialties.

HOW WOULD YOU DESCRIBE YOUR MANAGEMENT STYLE IN A FEW WORDS?

Examples included hands-on, delegation-focused, proactive, reactive, relationship and policy-driven approaches. As the author, I would describe my style as hands-on, proactive and policy driven. My experience in property management was shaped by structured guidelines, making the transition to HOA management a natural fit.

Gretchen Redewill, MBA, CCAM-PM, an Executive Director of Community Management with Associa – Desert Resort Management, describes her management style as hands-on and relationship-driven. When asked how she developed this style, she credits both strong and weak leaders as influential. "My experiences with both strong and ineffective leaders have been the most influential in shaping my management style," stated Redewill. "The out-of-touch managers served as examples of what not to do."

Similarly, Tracy Young, CCAM and Community Manager for Traditions Homeowners Association, takes a hands-on approach, closely monitoring her team to provide support when needed. She consciously shaped her management style based on past experiences, "I treat my team how I'd like to be treated, model high standards and work with them to provide support in meeting those standards."

Many managers learn from past experiences and intentionally adopt styles that counteract ineffective leadership they've encountered. However, as the industry evolves, managers must continuously reassess their approach.

A small but practical example: I often tell colleagues that if something feels off, they should start by evaluating their workspace. Is the monitor positioned correctly? Is there sufficient space to write? Is the phone easily accessible? Simple adjustments can improve efficiency, much like adjusting management styles to suit changing needs. As Redewill noted, "I've definitely adjusted my management style over time, especially as I've gained more experience and as work environments have evolved."

DO YOU BELIEVE YOUR MANAGEMENT STYLE IS WELL-SUITED FOR ALL TYPES OF COMMUNITIES, OR DO YOU HAVE A SPECIALTY IN A PARTICULAR ASPECT OF HOA MANAGEMENT?

CACM offers specialized certifications in areas such as Portfolio Management, Large-Scale Management and Financial Management. However, even after earning designations, many managers refine their niche based on their experiences.

Young emphasizes adaptability, planning and developing policies and procedures but doesn't associate these traits with a single specialty. Instead, she sees them as essential to managing various communities effectively. In contrast, Redewill identifies financial planning as her specialty, drawing on her 20 years of experience as a controller for country clubs.

The two underscored the importance of continuing education and staying informed about industry trends. "The demographics of my community are shifting toward a younger, more tech-savvy population," Young noted. "I am focused on implementing digital communication strategies to keep them informed and engaged." Attending professional events and adapting to demographic shifts within communities is crucial and remaining relevant as a manager requires awareness of emerging trends, evolving company policies and technological advancements.

WHAT ADVICE WOULD YOU GIVE TO NEW MANAGERS DEVELOPING THEIR STYLE?

Both managers highlight organization as one of the most vital skills in effective community management. "Build strong relationships with boards and stay organized. Every board has its own expectations, so aligning with their vision is critical. Clear goals help managers better understand the community's needs" Redewill said.

But other than becoming a "Type A" organized manager there are a few other pieces of advice to note. "Play to your strengths but adapt to your community's needs whenever possible," Young stated. "Seek support and don't hesitate to ask for help."

One notable takeaway from the questionnaire was the lack of mention of mentors. Most managers cited learning from poor leadership examples rather than developing good habits through mentorship. However, mentorship plays a crucial role in professional growth. As David Stoddard said, "Mentoring is not about making people like you, but about helping them become the best version of themselves."

Reflecting on my own career, I have been fortunate to have strong and intelligent leaders who guided me. Everyone deserves a mentor—someone to provide support during challenging times. I encourage each of you to look around your workplace. Identify a colleague who seems overwhelmed, constantly rushing or struggling to balance their workload. Reach out, offer guidance and help them find their niche. By fostering mentorship within our industry, we strengthen not only individual managers but also the communities we serve.

HELP A COLLEAGUE FIND THEIR NICHE. STRONGER MANAGERS MEAN STRONGER COMMUNITIES.

__Holly Smith, CCAM,__ is the Executive Director of Community Management at Desert Resort Management – an Associa Company and has over 20 years of experience in property management across Southern California.

The Most Importa

Management Company Metric to Tra

One of the biggest challenges our industry continues to face is the lack of standardized KPIs and benchmarks across management companies. As CAM Leadership Institute has grown in size and reach, we've decided to take that challenge head-on: **We're building out a standardized KPI dashboard for community management companies**—and as part of that process, we've been interviewing some of the highest-performing companies in the country. We're asking a simple question: what metrics have made the biggest difference in your profitability and overall success?

Unsurprisingly, the answers vary. Different companies prioritize different metrics based on where they are in their growth, and what challenges they're facing. What's important tends to evolve over time. Often, companies uncover issues through tracking, one company noticed their collections percentage was well below the market average. That insight led them to completely overhaul their collections process. They kept testing and adjusting until it improved.

That's the power of tracking. **When you shine a light on your data, you quickly identify where things are off.** Then, when you start applying time and resources to improve those problem areas, you can immediately measure what's working—and what's not. It saves time, energy and money when you know exactly where to focus your efforts.

That said, **there's one metric that consistently shows up among the most successful companies: the ratio between a manager's portfolio revenue (gross base management fees) and that manager's total compensation.**

This ratio is a critical indicator of whether a portfolio is profitable. Generally, we see that successful companies keep manager pay between 30% and 40% of the portfolio's base revenue. That leaves 60% to 70% to cover everything else—accounting, admin support, executive pay and ultimately, company profit.

Some companies have found creative ways to layer additional costs into their models, but our recommendation is to start simple: track your manager pay-to-revenue ratio consistently and update it regularly.

Here's the problem—most companies build their portfolios based on who has room when a new community signs on. That sounds reasonable, but it can have unintended consequences. You might end up losing money on a portfolio and not even realize it.

One company we worked with had been in business for 20 years and had never tracked this ratio. Once they started, they discovered

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that one of their highest-paid managers was responsible for a handful of low-revenue, high-maintenance communities. That manager's pay was almost 90% of the total revenue being brought in. They quickly restructured, let go of the low-paying accounts, raised fees and redistributed the portfolios. That year became one of the most profitable they'd had in two decades.

But this isn't a set-it-and-forget-it kind of thing. Manager portfolios should be reviewed and updated regularly. It should also be a key consideration when deciding who will take on a new community. Will it improve the manager's ratio or put it further out of balance?

Some companies are even training their managers on this ratio—helping them understand how much time should be allocated to each community. When a manager requests a raise, and their ratio is already off, leadership can have a clear conversation: a raise is possible, but only if their portfolio can support it, either through managing additional communities or improving fee structures.

Most high-performing companies keep this data in a large spreadsheet that gets reviewed frequently. But now, more and more are transitioning this over to Power BI to automate updates and visualize performance in real time.

As profit margins continue to shrink, the companies that are going to win in the future are the ones that treat profitability like a science. They're tracking key KPIs, reviewing them consistently and making operational decisions based on what the numbers tell them. And it all starts with understanding—and optimizing—the profitability of your manager portfolios.

Adam Balkcom *is the lead facilitator for CAM Leadership Institute.*

★★★★★
LOYAL!

★★★★★
GREAT FIT!

★★★★★
CAPABLE!

COMMUNITY WIZARD

DIGITAL DIPLOMAT

GREAT ATTITUDE

PROFESSIONAL

SOPHISTICATED

STRATEGIST

FINDING YOUR MANAGEMENT

SWEET SPOT

VISION DEFINES PURPOSE. NICHE DEFINES FOCUS.

If you have ever spent time sizing up your competition at industry events, I encourage you to change your mindset to observing and appreciating. You may be surprised at what you can learn. When I notice a thriving management company with a successful and visibly happy staff, I can't help but think that they all share the same fundamental outlook and that this organizational purpose has been reinforced from the top down. Each one of us is in different stages of finding our sweet spot in this tumultuous world of empowering the reluctant and there are so many ways to showcase our talents.

The days of the one-size-fits-all management company are fading like board meeting attendance after a special assessment announcement. Today's association boards are increasingly sophisticated and looking for management companies that truly understand their specific needs and challenges.

The power of vision in this industry cannot be overstated. An effective company vision goes beyond generic mission statements about "excellent service" or "professional management" (words that appear on virtually every management company website with the frequency of "pursuant to" in legal documents). Instead, it articulates a company's unique approach, values, and the specific value delivered to communities.

Consider the management company that centers its vision on technology-forward solutions for master-planned communities. Large, amenity-rich communities need sophisticated systems to manage their complex operations. By focusing vision on becoming experts in this space, a company develops specialized tools and expertise that generalist companies simply cannot match—much like how a specialized physician outperforms a general practitioner in their area of expertise.

Developing a vision requires honest self-assessment about core competencies, which aspects of community management the team genuinely enjoys, which types of communities they understand deeply, and where they've seen their greatest successes.

While vision defines a company's purpose and direction, the niche identifies the specific market segment where expertise will be focused. Finding this niche involves analyzing both internal strengths and external market opportunities.

Common management niches include property type specialization (such as high-rise condominiums, single-family home communities, active adult communities, commercial properties or mixed-use developments); community size (boutique associations under 50 units, mid-size associations with 50-300 units or large-scale developments with 300+ units); geographic focus (urban communities, suburban neighborhoods, resort communities or revitalization districts); service level (full-service management, financial management only or consulting services); and special expertise (new development transitions, turnaround situations or communities with specific amenities like golf courses or marinas).

Management companies that pick a clear niche have a better chance at keeping clients longer than those that try a general approach, building loyalty and security. Raising fees becomes less of a threat and more of a conversation. The payoff of maximizing your company's strengths isn't small, it's big enough to make or break your business over time.

A company's vision and niche should also influence hiring decisions. When a management company clarifies its specialty the entire recruiting strategy shifts accordingly. The wise management professional specifically seeks out managers with experience aligned with their specialty, as well as similar personalities, work ethic and technological or communicative skills that will help exemplify their overall vision for success.

Investing in expertise specific to a chosen niche, whether specialized certifications, industry knowledge or relationship-building with relevant vendors and partners, becomes not just beneficial but essential. Creating an environment where you support your employees and reward those who seek education not only assists in retaining your high performers but also reinforces your commitment to the clients you serve.

Not every management company is right for every development, much like no single paint color will satisfy every member of an architectural committee. The most successful client relationships occur when there's mutual recognition of a good fit, much like a perfect board meeting—ending on time with all agenda items addressed. Experienced managers learn to be upfront about what they do best and aren't afraid to refer communities to other managers if they're not the right match. This professional courtesy ultimately strengthens the industry as a whole.

Effective marketing can assist in branding your core focus and industry involvement helps to reinforce company visibility. Speaking at conferences, writing articles or hosting webinars on topics related to a niche establishes authority and makes it easier for communities within the target market to find a management company. This type of positive exposure may also assist other managers in finding the right company fit for themselves, without having to resort to the unscrupulous practice of poaching from a competitor.

Market conditions change, communities evolve and companies grow in capabilities over time. Consistently reassessing your company vision will help ensure that you continue to reflect your strengths and maximize market opportunities as they arise. Sometimes changes needed may be minor adjustments to refine approach or occasionally pause to identify new opportunities that may align with your strengths.

Defining a clear vision for yourself or for your company requires making choices – deciding not only what a company will do but what it won't do. Deciding what you are good at and what you are not good at. This introspection can be challenging, especially when it means turning away potential business that doesn't align with the focus, a decision that can feel as painful as explaining a financial report to a social committee.

Having a focused approach can lead to stronger client relationships, more effective service delivery, and ultimately, more sustainable business growth. A specialized approach allows managers to anticipate issues before they arise and assists in their ability to make decisions knowing they have the support of the company behind them.

In the competitive landscape of association management, there will always be the global dominators who take the "Pokemon approach" (Gotta catch them all!), and maybe this in itself is a specialty. However you choose to make sense of this uncanny ability we have to assist the resistant, remember that specificity is powerful. The clearer one is about who they are and who they serve, the more they'll attract the right communities and build the expertise that makes their services truly indispensable.

Jeff Farnsworth, CAMEx, CCAM-PM. ND*, is the CEO of Steward Property Services, Inc., and has more than 15 years of experience providing management services in Northern California.*

REASONS TO BECOME A CACM INSTRUCTOR

- Give back to your industry
- Learn a new skill
- Help educate managers
- Learn from other managers and attorneys
- Share your experience
- Connect with the CACM Community
- Add “instructor” to your resume
- Expand your horizons, do something you never thought possible!
- Earn Continued Education Units (CEUs) towards recertification

Thank You to Our 2025 Instructors

We want to extend a heartfelt thank you to our incredible instructors who have given so much of their time and expertise this year. Your dedication to educating our managers and industry partners—while still managing your own communities, handling active cases and contributing to committees at CACM and beyond—is nothing short of inspiring. Your volunteerism and commitment are essential not only to CACM, but to the continued advancement of our industry. The work we do simply wouldn’t be the same without you, and we’re deeply grateful for all that you do.

A.J. Jahanian Esq.
Adam Haney CPA
Alexandria Pollock CCAM-HR
Amy Tinetti Esq.
Andrea O’Toole Esq.
Bradley Schuber Esq.
Cang Le Esq.
Charlotte Allen
Christina Ciceron Esq.
Christina French-Hokafonu CAMEx, CCAM-LS.HR.PM.ND.AA. LM, CAFM
Corinne Crawford CCAM-ND
Daniel Heaton Esq.
Darren Shaw CAMEx, MCAM-LS.AA
Deborah Griffiths CCAM-Emeritus
Demetrios Xanthos
Ellen Schuster Esq.
Fred Whitney Esq.
Fred Scaglione CAFM, CCAM
Hamlet Vazquez MCAM-HR
Heather Wiltshire CCAM
Jeffrey Beaumont Esq.
Jennifer Leanos CCAM
John Hansen Esq.
John Kalas CAMEx, CCAM
Karen Conlon MCAM
Kathryn Henricksen CAMEx, CCAM
Keith Lavery CCAM
Kimberley Flickner CAMEx, CCAM-PM.LS.ND.AA.CID.LM, CAFM
Kimberly Streetman CAMEx, CCAM
Kimberly Lilley
Kumar Raja Esq.
Kyle Ruiz-Hawkins CCAM
Lisa Tashjian Esq.
Mark Guithues Esq.
Robert Smith CCAM-HR
Robert Browning
Robin Romo CAMEx, MCAM-HR
Rolf Crocker CAMEx, CCAM
Scott Clements
Stacy Gerowitz CAMEx, CCAM
Steven Roseman Esq.
Susan Janowicz CCAM-LS.AA.LM
Tara Radley Esq.
Terri Guest
Tim Flanagan Esq.

PASSIONATE ABOUT OUR INDUSTRY? JOIN OUR TEACHING FACULTY!

If you have a passion for our industry and find happiness helping shape current and future leaders, consider volunteering to teach with us! Manager member instructors can earn CAMEx points for teaching, as well CEUs for teaching and auditing.

Contact education@cacm.org to learn more!

serving your communities

New Industry Partner Members

CACM members further their success in the industry and benefit by partnering with colleagues to share new ideas and best practices. Please join us in welcoming these new members from the fourth quarter of 2024 (January 1-March 31.)

ALLBRiGHT Painting & Construction
Valencia I (661) 464-0771
https://www.allbrightpainting.com/

Anva
Mesa I (888) 811-2682
http://www.anva.com

Ballot Bliss, LLC
Nashua I (877) 974-5372
https://ballotbliss.com/

Belfor Property Restoration
Birmingham I (248) 594-1144
https://www.belfor.com/us/en/

Bellator Pest & Termite Control
Vacaville I (916) 938-3281
https://bellatorpestcontrol.com/

Bender Insurance Solutions
Roseville I (415) 902-9646
https://mybendersolutions.com/

CAM Advisors
New York I (404) 692-0982
https://www.camadvisors.co/

Capra Environmental Services, Corp.
Roseville I (916) 952-4628
https://www.capraenvironmental.com/

CertaPro Painters of Carlsbad, La Jolla, Chula Vista & Poway
Carlsbad I (760) 637-0485
https://certapro.com/carlsbad/

Chaix Law
Walnut Creek I (800) 379-6911
http://www.chaixlaw.com

Champion Property Services
Anaheim I (714) 381-5246
https://www.championcps.com/

CommonArea Financial
King of Prussia I (800) 963-9315
http://www.commonareafinancial.com

Crown Facility Solutions
Santa Ana I (657) 266-0821
https://crownfacilitysolutions.com/

DSA Landscape, Inc.
San Marcos I (619) 886-8677
https://dsalandscapeinc.com

Duarte Construction
Loomis I (916) 770-7731
https://www.duarteconstruction.com/

EntryOne
Newport Beach I (714) 717-5426
https://www.entryone.com/

ePIPE – Pipe Restoration Inc.
Santa Ana I (714) 323-5843
http://www.whyrepipe.com

Ergeon Inc.
San Jose I (888) 374-3661
https://www.ergeon.com/

Ferrari Moe, LLP – Architects & Engineers
San Rafael I (415) 458-3511
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David vs. Goliath

A Manager's Perspective on Firm Size in Community Management

By Lorena Sterling, CAFM

BOUTIQUE FIRMS MATTER IN A GROWING INDUSTRY

Within the ever-changing scope of community association management, does size really matter? As large firms continue to grow through acquisitions, many professionals wonder whether small boutique companies can still compete or if they're on their way to extinction.

The truth is that there is no one-size-fits-all answer. Both small and large companies offer unique advantages. Understanding the distinction can help managers align their careers with companies that match their values and aspirations. At the same time, executives and boards can better determine what kind of partnership suits their community's needs.

THE STRENGTHS OF LARGER MANAGEMENT COMPANIES

Large management firms typically have well-established training programs, advanced software systems and specialized departments for accounting, compliance, IT and legal matters. These firms can offer managers the opportunity to work within structured environments, with access to internal resources that ease some of the complexities of daily operations.

With greater bandwidth, large companies can take on multiple communities simultaneously, absorb the workload from sudden changes like manager turnover and offer more robust business continuity planning. The economy of scale they operate under can also result in reduced costs for certain services, which is appealing to cost-conscious boards.

Moreover, larger firms may offer clearer career paths for those pursuing management. A committed manager might progress into supervisory roles, training positions or even executive leadership within a wider corporate structure.

THE CASE FOR SMALLER BOUTIQUE FIRMS

While large firms may seem to dominate the landscape, smaller firms, especially boutique management companies, still play a crucial, irreplaceable role in the industry. These companies often excel in personalization, responsiveness and local expertise.

For managers, working at a boutique firm often comes with greater autonomy. Decision-making tends to be more agile, and innovative ideas don't get bogged down by red tape. Relationships with clients are often closer, and managers may find deeper satisfaction in being directly involved in shaping the client experience. The family-like culture and hands-on ownership can also foster loyalty and employee retention.

Executives at boutique firms can build a brand based on specialized services, reputation and trust. These firms thrive on relationships, not just with clients but also with vendors, developers and even local municipalities. Being deeply embedded in the regional market allows these firms to anticipate issues before they arise and customize solutions rather than applying a one-size-fits-all approach.

I've seen firsthand the power of specialization being the owner of Community Association Financial Services. As a boutique financial management firm serving over 85 homeowners associations, we focus solely on HOA finances, leaving the day-to-day property management to our partnering management company. This clarity of role allows us to provide unparalleled attention to accounting, accuracy, financial transparency and board support, without the operational noise that often burdens larger, full-service firms. Our size enables us to maintain close relationships with our boards while responding to their needs quickly and personally. This model fosters mutual respect and collaboration between us and the management companies we work alongside, ensuring that every community benefits from a tailored, expert-driven approach.

This boutique framework is not only sustainable, but also highly sought after by communities that value financial clarity, consistency and true partnership in stewardship.

NAVIGATING GROWTH WITHOUT LOSING IDENTITY

As acquisitions and mergers shaped the industry, some boutique firms face pressure to sell or scale. While growth is often necessary for survival, it doesn't mean small companies need to lose their identity or independence.

Boutique firms can maintain their niche by focusing on intentional growth, selecting clients that align with their values and structure in a way that supports, rather than compromises, their core service model. Strategically leveraging technology can help smaller firms compete on efficiency while retaining their personal touch.

Managers and executives at small firms should not view industry consolidation as a threat, but as an opportunity to refine their value proposition. There is power in being small, nimble, client-focused and community-driven. Many boards are increasingly aware of the pitfalls of being a "small fish in a big pond," where service can feel generic and support can be slow. For those communities, boutique firms are often the perfect fit.

In fact, despite the expanding footprints of large companies, boutique firms remain the lifeblood of the industry. In California, for instance, estimates suggest that for every large-scale management firm, there are at least ten or more boutique companies. While only a couple of dozen large firms operate at scale statewide, hundreds of smaller firms serve local communities with specialized care and regional expertise. This ratio is a testament to the demand for boutique-style management and the relationship and responsiveness that come with it.

THE RIGHT FIT DEPENDS ON THE COMMUNITY AND THE CULTURE.

Ultimately, whether a small or large firm is the "better" choice depends on the unique needs of each HOA and the career goals of each professional. A high-rise in a dense urban setting with complex amenities may require the infrastructure of a large company. Conversely, a midsize, planned community with a strong volunteer board may prefer a boutique firm that values long-term relationships and offers continuity in management.

For professionals, the decision often comes down to personal alignment. Do you prefer a highly structured corporate environment with a path to climb? Or are you driven by relationship-based work, where your voice carries weight and creativity is encouraged?

The industry is large enough to support both models. What matters most is recognizing the strengths in each and ensuring we continue to value the contributions of all, from the national firms managing portfolios across states to the local company that knows every pothole and parking spot in the neighborhood.

FINAL THOUGHTS

As the community management industry continues to evolve, the choice between small and large management companies will remain nuanced. Boutique firms are not relics of the past; they are a vibrant and necessary part of the ecosystem. Rather than fearing the rise of giants, boutique firms should embrace their unique strengths, including personalized service, flexibility and authentic community connections.

Managers, executives and board members alike should remember: the goal is not just management, but guardianship. And guardianship, regardless of the size of the company, starts with care, character and commitment.

***Lorena Sterling, CAFM**, is the Owner of Association Financial Services (CAFS).*

One Property, Board, Big Opportunity

THOUGHTS AND TIPS ON BEING AN ONSITE MANAGER

By Hamlet Vazquez, MCAM-HR

Are you tired of juggling multiple boards, multiple board meetings and multiple properties? Or are you tired of overseeing the managers who juggle multiple boards, multiple board meetings and multiple properties? If so, being an onsite General Manager might be the right next move!

Imagine for a moment what it would be like to not have to work 50+ hour work weeks and only have one board to deal with, one board president, one budget, one property! Some of you might be thinking, 'That sounds boring!' but in reality, it really is not! The properties that have a dedicated onsite manager tend to also come with a large staff, multiple amenities and a large budget which all tend to translate to a busy, and diverse day, along with higher pay. That higher pay will come in handy as you figure out what to do with all your free evenings and weekends! So, if I have 'sold' you on the idea of being an onsite, below are some management skills to focus on and possible ways to secure one of these onsite positions.

PEOPLE MANAGEMENT

One of the primary common denominators among successful onsite managers is that they are good with people. It may go without saying that to be a successful manager in general involves being good with people, but as an onsite it really needs to be one of your main defining characteristics. It's one thing to deal with board members, owners, residents and vendors over the phone or via email but as an onsite you are dealing with all of these people in person, each and every day. Your body language, tone and overall presence will speak volumes to them as you interact with them. This is one of the reasons why I always wear a suit when I am onsite. I am, after all, a professional and my role is more akin to that of a Chief Executive Officer of a corporation than simply a manager who happens to have an office onsite. This leads to the next set of management skills necessary for a successful onsite.

BUSINESS MANAGEMENT

As the CEO of the property, you cannot superficially understand the financials of the corporation, you need to have a deep understanding of the terms and the numbers reflected in the financials. Again, you might already need to do some of this as a portfolio manager but as an onsite you need to know them like the back of your hand and really there is no excuse not to given that you should be overseeing each and every single transaction that takes place at your property. Aside from obviously taking the CACM finance and budgeting related courses, if you've never taken an accounting or finance course it would be worth your time to do so if you plan to be an onsite manager in the future.

Another aspect of being a CEO and running a business is becoming an expert of all things HR. As indicated before, being an onsite usually involves overseeing a large staff of diverse characters, personalities and generations. At my current property I oversee a staff of 30 ranging in age from 29 to 69 and of very diverse backgrounds. I don't have an HR department to fall back on which has resulted in the need to either rely on previous training (when I worked for a management company) or learn on my own and stay up to date on the ever-changing California labor law landscape. If you currently have an HR department to rely on, my advice is to soak in all the information they provide to you and don't brush it off; once you are an onsite and are the HR department you will be glad you did!

TECHNICAL KNOW-HOW

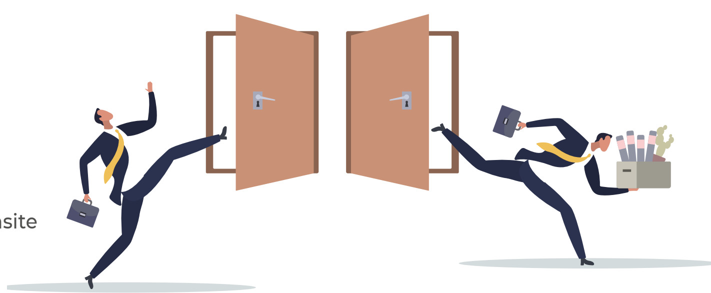
If you really want to stand out from other good managers, and be an exceptional candidate for an onsite, in particular for a high-rise onsite role, try to learn as much as you can about mechanical systems, construction and, in general, how things work. As with knowing about legal concepts, the idea is not for you to be your association's legal counsel or the building engineer or construction manager but to be able to 'speak' the language so that you are able to engage in constructive problem solving whether that's with your building engineer or a contractor engaged in a major project at your property.

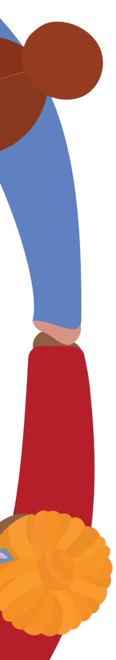
LANDING THE GIG

As I reached out to other onsite General Managers, what I heard over and over again when I asked what advice they would give someone trying to land an onsite gig, the overwhelming response was to start out as an onsite assistant, whether that is as a Manager Assistant, Office Manager, Operations Manager or an Assistant Manager, anything that will give you experience at an onsite. Many of the current best onsite managers out there started out in one of these roles and were in those roles for several years before landing the 'big chair' as one of those managers put it.

CERTIFICATIONS

Lastly, aside from People Management, Business Management and Technical Know-How, it certainly doesn't hurt to have earned the highest credentials available in the industry. For my current role, I was told by the recruiter that my Master of Community Association Management (MCAM) certification made me stand out among all the applicants. Not only will this certification make you stand out, but the amount of knowledge you will gain along the way will help you become a better manager no matter whether you are an onsite, senior or portfolio manager.





Another key way to land that onsite gig is summed up in one word:

NETWORKING

Aside from getting lucky and being at the right place, at the right time, there really is no short-cut to landing one of these roles and the surest way to accomplish this is by being involved in industry events, and getting to know your peers, in particular the senior managers who ultimately hire for these roles. For securing an onsite role at a self-managed property like mine, the best way is also via these industry events and getting to know the current onsite managers since they will one day retire (yes, they usually stay till retirement!) and, assuming they have built up lasting trust with their boards, will be intricately involved in hiring their replacement one day. With that said, if you are interested in taking over at my current property in about 10 years look me up at the next industry event!

Hamlet Vazquez, MCAM-HR, *is the General Manager at Wilshire Terrace Co-Op in Los Angeles.*

BALANCING INNOVATION AND ACCESSIBILITY

HOW COMMUNITY ASSOCIATION MANAGERS CAN SUPPORT TECH-FORWARD OPERATIONS WITHOUT LEAVING DIRECTORS BEHIND

Community association management continues to evolve, and with it comes a growing reliance on technology to deliver faster, more efficient service to homeowner association boards. From online meeting platforms and digital payment portals to integrated work order systems and document storage tools, these advancements aim to simplify operations, improve transparency and enhance responsiveness.

However, the adoption of technology also presents a unique challenge: not every board member is equally comfortable with digital tools. For community association managers, the task is twofold—support the tech-forward direction of their management company while ensuring that the volunteer Board of Directors feels confident, informed and empowered.

Adding to the complexity is the reality that managers often do not choose which software platforms or communication systems their firms adopt. Yet, they remain responsible for implementing these tools in a way that meets clients' expectations. Doing so without doubling work or causing confusion requires intention, structure and thoughtful communication. Here's how CAMs can navigate this balance effectively.

1 ASSESS THE BOARD'S DIGITAL READINESS EARLY AND OFTEN

Every Board of Directors is different. Some are made up of highly technical professionals who are ready to adopt digital solutions on day one, while others may consist of long-serving members who prefer paper packets and in-person updates. To avoid mismatched expectations, managers should assess a board's digital readiness during onboarding—or when a new member joins.

This doesn't require a formal survey. A few open-ended questions during early meetings—such as "How do you prefer to receive board packets?" or "Are you comfortable accessing documents through the portal?"—can offer valuable insight. These conversations help managers tailor their support without deviating from company protocols. Create a digital preferences summary for each board and keep it updated to ensure consistent service, especially during manager transitions.

2 WORK WITHIN THE SYSTEM – BUT OPTIMIZE IT

Since most community association managers don't control what technology their company or community implements, the key is to maximize the flexibility that does exist within those systems. Many association management platforms offer features like:

- Auto-generated reports that can be printed or emailed
- Board-only access portals for private document review
- Adjustable notification settings (email, SMS, etc.)
- Downloadable formats for those who prefer offline review

Managers can often customize the delivery or presentation of information without altering the system itself. For example, rather than reformatting

an entire board packet, a manager might provide a printed agenda summary alongside the full digital packet. This satisfies a director's preferences without creating a parallel workflow.

It is best practice to keep a few blank printed forms or hard copies available as a backup—but set expectations that digital formats are the default (and should be cheaper than hard copies).

3 Set Expectations and Policies to Avoid Double

A common pitfall for managers is falling into the trap of doing everything twice: once to satisfy company processes, and again to meet individual board member preferences. This quickly becomes unsustainable, especially for portfolio managers.

To avoid this, it's essential to set and communicate boundaries early. Make it clear that while reasonable accommodation can be made, the company's standard tools and systems are the primary means of communication and recordkeeping (and are likely why the board chose your management company). When board members understand that managers are working within a defined structure, they're more likely to accept those limitations and adjust. Where possible, work with your board members to adopt their own policies that match the way your company operates.

For example:

> "Board packets will be distributed via email. Board members may request a printed copy individually, but they will no longer be mailed automatically.

> "Board meetings will be conducted virtually. If any two (or a majority) Board members would like to meet in person, then the entire meeting will be in person." (This ensures you are not the only one not physically present during the meeting.)

Include communication and delivery standards in the board orientation materials or your monthly manager's report as a reference point.

4 Offer Hands-on Support for Less Tech-Savvy Directors

Community association managers are often the face of their company's technology, even when they don't choose or design it. That means they must become educators, troubleshooters and cheerleaders for the systems their boards use.

Rather than simply directing board members to a help desk or FAQ page, managers can bridge the gap with personalized support:

- Offer brief one-on-one tutorials during meetings or site visits
- Create cheat sheets with log-in instructions, portal navigation and contact information
- Walk a board member through submitting a violation response or accessing a financial report in real time

This personal attention can be the difference between frustration and adoption—especially for directors who didn't grow up with digital tools. Keep a file of quick-reference guides for your company's systems that you can modify or share on short notice.

5 Reinforce the Benefits of Technology with Data

When board members understand how technology improves transparency, saves time and reduces cost, they are more likely to support its continued use. Managers should consistently highlight these benefits, using specific examples whenever possible. Stress the importance of board members using the tools provided to them by the systems your company has created so that you can spend your time working on the action items from their meetings instead of being their personal gopher.

Community association managers play a pivotal role in helping their boards adapt to an increasingly digital operating environment. Even without direct control over which technologies are used, managers can guide, support and set expectations in a way that enhances service delivery while respecting the diverse comfort levels of board members.

Success lies in working *with* the system—not around it. By offering tailored support, setting boundaries to avoid duplicated work and reinforcing the benefits of tech-forward practices, managers can foster confidence among their boards and drive more efficient, inclusive governance for the communities they serve.

Andrew Hay, CAMEx, CCAM-ND.PM, *is a CACM board of directors' member and CEO of The Helsing Group Inc., ACMC.*

LET'S TALK

Right-Sizing Your Management Company

STRATEGIES

When it comes to acquisitions, the deal on a page can look enticing: 400 more doors, predictable revenue streams and instant portfolio expansion. Nice! Or, shall I say, "Nice?"

Naturally, you wonder what lurks beneath the numbers to turn your "Great!" to groan. Will you find demanding boards used to 24/7 access, inefficient processes that drain resources and expectations built on promises you never made?

These unknowns are why "right-sizing" your management company is so much more than a numbers game. When considering acquisitions, you're negotiating far more than a transaction. You're establishing a philosophy of sorts: How big should we get? When it comes to growing pains, what do we consider "worth it?"

The Mirror Questions

So, before you even think about growth through acquisition, you need to turn off the phone, close the laptop and think about who you are and what you want. It's time for a genuine inner interview.

Start with the basics: What kind of company are you really trying to build? Don't think about what looks good on paper or what others expect — what do you want? Are you planning to sell eventually? Or are you building something to run for decades? These aren't just philosophical questions. They're also practical because they'll drive every decision you make about growth.

Then dig deeper: What makes your current operation successful? It could be your hands-on approach with boards. Perhaps it's your meticulous attention to maintenance schedules. Can you maintain those standards at twice your size? Three times? If not, are you willing to change your management style?

Think about your daily routines. How much complexity can you actually manage well? What can you oversee without losing sleep, missing family dinners or compromising service quality? Chasing quick profits can turn a manageable operation into a stress factory overnight.

Now, shift those thoughts to your team: Do you have the right people to manage a larger operation? What's your capacity for training new staff while maintaining current service levels? Will your team be motivated to take on additional stress, or will they burn out? What will you do to retain key people during big changes?

Navigating Acquisition Challenges

Phew! You did your soul-searching, decided to give it a go and put your John Hancock on the paperwork. Here we go! Brace yourself.

Don't be shocked to discover the previous manager had a completely different approach to handling maintenance requests. Their boards are used to getting instant approvals for any expense under $5,000. The maintenance staff expects to work directly with board members.

Documentation might be spotty. Vendor relationships could be strained. You learn the previous manager cut corners on reserve studies or neglected preventive maintenance to keep costs down. Now you're inheriting those delayed problems — and the costs that come with fixing them.

Every management company develops its own way of doing things. When you acquire a portfolio, you're trying to merge two distinct cultures. It can be like arranging a marriage between families with different values, traditions, and expectations.

Making Acquisitions Work

To make it work, you need a detailed transition plan. You'll need to request board meeting minutes from the past two years, review maintenance records, talk to key vendors and ask about pending legal issues or major projects.

You might consider a gradual transition period where the previous manager stays involved as a consultant, helping smooth the handoff and maintain continuity for boards and residents. Or, you might see a clean break as imperative.

You'll need to plan for extra staff training and community education. Your new team members will need to understand your systems, and your staff will need to help communities understand and adapt to a new management style.

The Power of Organic Growth

Of course, there's an alternative to acquisitions — organic growth. This approach means building your portfolio one relationship at a time. It starts with clearly defining your ideal client. What size communities do you serve best? What amenities can you manage effectively? What board personalities mesh with your management style?

When you grow organically, you can establish expectations from day one. Your service agreement reflects your actual practices. Boards understand your communication style before they sign.

Making Organic Growth Work

Successful organic growth requires a strong reputation and a consistent marketing presence. You'll want to build relationships with local real estate agents, developers and attorneys who can refer business. You can also establish yourself as a thought leader through educational seminars, articles and community involvement.

As you grow, it's important to document all of your processes and staff duties. A good rule of thumb for standard operating procedures (SOPs) is that a new hire should be able to quickly perform 80 percent of the job based on the guidelines.

"Right-sizing" is ultimately about aligning your values with your goals.

No matter the industry, we're all searching for technological solutions to manage higher volumes efficiently, but you might also consider expanding your team geographically. Not all roles must be handled onsite. You can hire globally at a fraction of the cost for certain tasks and use the savings to retain key onsite employees or reinvest in other improvements.

Finding Your Path

Whatever you choose, make sure you match your growth strategy to your business goals. Rapid acquisition growth might make sense if you're building to sell. Just be prepared for the inherited challenges. Organic growth could be your better path if you're creating a legacy company focused on service quality and staff satisfaction.

You could also consider a hybrid approach, using organic growth as your foundation while remaining open to strategic acquisitions when they truly fit your model.

Whenever your head starts spinning, it's always worthwhile to return to basic questions: Will this move make us better at serving our communities? Will it improve life for our team? Will it strengthen our financial foundation?

A deal might look great on paper, but it's worth a deeper dive before signing on the dotted line if it compromises any of these foundations. That's because "right-sizing" is ultimately about aligning your values with your goals. When you've done that, you're wearing success that fits just right.

***Anne Lackey** is the Co-Founder of HireSmart Virtual Employees, a full-service HR firm helping others recruit, hire and train top global talent.*

Whether you're a seasoned pro or have never picked up a golf club, 2025 CACM's Trick or Tee is the perfect event to connect with your peers, enjoy some sunshine and of course show off your Halloween spirit in your best costume! Get ready for a day of fun activities, including putting practice, hitting some balls at the driving range and maybe even snagging some awesome swag. It's all about having fun, meeting new people and enjoying a day filled with laughter and good vibes. Don't miss out! We can't wait to see you there!

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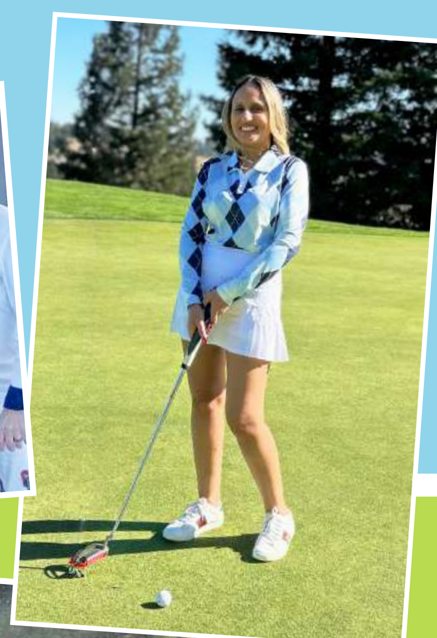

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Jennifer Wada, Esq., an attorney and CACM's Legislative Advocate provides legislative updates, plus check out our Bill Tracking Report.

INDUSTRY LEADING PUBLICATIONS

CACM publishes the Law Journal with legal insights on community management; Vision Magazine with industry trends and member news; and an annual Resource Guide with contact details for management leaders and service providers.

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CALIFORNIA MANAGERS:

BREAK THE CYCLE OF STALLED HOA COLLECTION

By Mitchell Drimmer

When a homeowner falls behind on assessments, the financial burden doesn't just affect them, it affects the entire community. Associations rely on assessment payments to cover maintenance, insurance, utilities and reserves. The longer delinquencies remain unresolved, the greater the strain on the budget, often forcing boards to raise fees on responsible owners or delay necessary repairs.

Many California HOA managers know that this can leave your boards feeling stuck between a rock and a hard place.

As their community management team, you have the opportunity to set your services apart by helping boards find proactive solutions to unpaid HOA assessments.

CALIFORNIA HOA COLLECTIONS AND THE DAVIS-STIRLING ACT

HOAs and condominium associations in California are bound by strict regulations in the Davis-Stirling Act when it comes to delinquent assessments. Two restrictions in particular are crucial to fostering success in your California communities but also make boards (and managers) hesitant to begin collecting.

CALIFORNIA HOAS MUST ADOPT A COLLECTION POLICY

The comes from **Civil Code § 5310**, which mandates that an HOA board must adopt a collection policy and offer delinquent owners a payment plan before escalating legal action. This is a fair consumer protection measure, ensuring that homeowners have options before facing severe consequences.

However, simply having a policy isn't enough, associations must also enforce it proactively.

LIMITATIONS ON FORECLOSURE

Civil Code § 5720 effectively says that a California community association cannot collect delinquent assessments, regular or special, through judicial or nonjudicial foreclosure on an amount less than $1,800, or on debts less than 12 months old.

This part of the law is designed to protect homeowners from losing their property over small debts, which is a very good thing. The problem is that many managers and board members mistakenly equate foreclosure with collections.

They are ***not*** the same.

THE CHALLENGES OF DELAYED HOA COLLECTIONS

Inconsistent collection actions, coupled with the confusion between collecting and foreclosing, mean California associations are struggling to maintain financial stability.

Foreclosure is ***not*** collections.

There is no restriction on when an HOA or condo association can begin the collections process. In fact, waiting until an owner reaches the foreclosure threshold can be financially reckless for the community. Instead of allowing delinquent accounts to pile up, associations should act early and

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THE PROBLEM IS THAT MANY MANAGERS AND BOARD MEMBERS MISTAKENLY EQUATE FORECLOSURE WITH COLLECTIONS.

THEY ARE NOT THE SAME.

use legal, ethical and effective collection strategies to recover what is owed before the debt spirals out of control.

The belief is that if they can't foreclose, they can't collect, forcing them to wait until the thresholds have been met. The longer debt sits unrecovered, the more struggles the community faces:

- **HIGHER WRITE-OFFS**
  The larger the debt, the harder it is to collect. Allowing debt to grow month after month puts the owner in a more difficult position when the collections process does start.
- **UNRECOVERABLE FUNDS**
  If the owner declares bankruptcy, the association may receive little to nothing.
- **ANGRY RESIDENTS**
  Financially responsible owners may resent subsidizing those who don't pay.

PROACTIVELY ADDRESSING CALIFORNIA HOA DELINQUENCIES

Foreclosure is not collections, and a collections policy is not enough on its own.

It's time to rethink HOA debt collection in California.

The message is clear: don't wait until it's too late. Instead of letting delinquent accounts accumulate to the foreclosure threshold, help your boards adopt and implement a strategic, compliant and ethical collections process. Doing so safeguards the financial well-being of the entire community.

Are your associations prepared to handle delinquencies before they become unmanageable? If not, help them change that with a company like Axela. We are a premium technology solution that helps facilitate HOA debt collection. Engaging with a professional service early in the process offers numerous advantages:

- Consistent communication: Delinquent owners receive recorded phone calls, emails, letters and text messages to remind them of their obligations.
- Consumer protections: Collection agencies that adhere to the Fair Debt Collection Practices Act (FDCPA) ensure homeowners are treated fairly and respectfully.
- Higher recovery rates: Collecting smaller debts early is far easier than waiting until an owner is thousands of dollars behind.

Set your management team apart from the rest by helping your communities understand the importance of early, efficient collections practices and break the cycle of stalled HOA debt collection today!

Visit www.axela.com for more information.

__Mitchell Drimmer__ is the President of Axela Technologies, a licensed community association manager and author of The Art of Collections for Community Associations. A practical guide designed to help managers and board members navigate the complexities of collections.

CACM'S
EXECUTIVE LEADERSHIP SUMMIT
2025


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REPRESENTING HIGH-RISE, MID-RISE, AND
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EVENTS


Shahla
Lori
CMI orchards
BAG / EXPORT
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Spring Member Dinner
Sponsored by:

upcoming courses

Course Calendar

FOUNDATIONAL ETHICS

Zoom — *CMM 130*

Session 1 of 2
July 2
9:00 AM - 11:00 AM

Session 2 of 2
July 2
9:00 AM - 1:00 PM

REGISTER

ADVANCED ETHICS

Zoom — *LDR 500*

Session 1 of 2
July 3
9:00 AM - 11:00 AM

Session 2 of 2
July 3
9:00 AM - 1:00 PM

REGISTER

CCIP: HOA CORE PRINCIPLES

Zoom — *CIP 100*

Session 1 of 5
July 8
8:00 AM - 10:00 AM

Session 2 of 5
July 15
8:00 AM - 10:00 AM

Session 3 of 5
July 22
8:00 AM - 10:00 AM

Session 4 of 5
July 29
8:00 AM - 10:00 AM

Session 5 of 5
August 5
8:00 AM - 10:00 AM

REGISTER

THE BASICS OF ASSOCIATION MANAGEMENT

Zoom

Session 1 of 8 *CMM 101*
July 8
9:00 AM - 11:00 AM

Session 2 of 8 *CMM 101*
July 9
9:00 AM - 11:00 AM

Session 3 of 8 *CMM 101*
July 15
9:00 AM - 11:00 AM

Session 4 of 8 *CMM 101*
July 16
9:00 AM - 11:00 AM

Session 5 of 8 *CMM 102*
July 22
9:00 AM - 11:00 AM

Session 6 of 8 *CMM 102*
July 23
9:00 AM - 11:00 AM

Session 7 of 8 *CMM 102*
July 29
9:00 AM - 11:00 AM

Session 8 of 8 *CMM 102*
July 30
9:00 AM - 11:00 AM

REGISTER

EFFECTIVE MEETING & ELECTION TOOLS

Zoom — *BDA 220*

Session 1 of 2
July 9
1:00 PM - 3:00 PM

Session 2 of 2
July 10
1:00 PM - 3:00 PM

REGISTER

ADVANCED INSURANCE PRINCIPLES

Zoom — *INS 300*

One session only
July 10
9:00 AM - 12:30 PM

REGISTER

LARGE SCALE MANAGEMENT

Zoom — *SPC 410*

Session 1 of 6
July 16
1:00 PM - 3:30 PM

Session 2 of 6
July 17
1:00 PM - 3:30 PM

Session 3 of 6
July 23
1:00 PM - 3:30 PM

Session 4 of 6
July 24
1:00 PM - 3:30 PM

Session 5 of 6
July 30
1:00 PM - 3:30 PM

Session 6 of 6
July 31
1:00 PM - 3:30 PM

REGISTER

HUMAN RESOURCE MANAGEMENT

Zoom — *LDR 400*

Session 1 of 3
July 17
9:00 AM - 11:30 AM

Session 2 of 3
July 24
9:00 AM - 11:30 AM

Session 3 of 3
July 31
9:00 AM - 11:30 AM

REGISTER

EXPLAINING FINANCIAL STATEMENTS

Zoom — *FIN 220*

Session 1 of 3
July 22
1:00 PM - 3:00 PM

Session 2 of 3
July 29
1:00 PM - 3:00 PM

Session 3 of 3
August 12
1:00 PM - 3:00 PM

REGISTER

AGE-RESTRICTED ACTIVE ADULT COMMUNITY

Zoom — *SPC 420*

Session 1 of 2
August 5
9:00 AM - 11:00 AM

Session 2 of 2
August 12
9:00 AM - 11:00 AM

REGISTER

NEW DEVELOPMENT MANAGEMENT

Zoom — *SPC 440*

Session 1 of 6
August 6
9:00 AM - 11:30 AM

Session 2 of 6
August 7
9:00 AM - 11:30 AM

Session 3 of 6
August 13
9:00 AM - 11:30 AM

Session 4 of 6
August 14
9:00 AM - 11:30 AM

Session 5 of 6
August 20
9:00 AM - 11:30 AM

Session 6 of 6
August 21
9:00 AM - 11:30 AM

REGISTER

All educational courses through the end of the year are held on Zoom.
Please contact a member of the Education Department for further details and schedule.
Click on courses below to register.

CALIFORNIA LAW

Zoom

Session 1 of 8 *CMM 121*
August 6
1:00 PM - 3:00 PM

Session 2 of 8 *CMM 121*
August 7
1:00 PM - 3:00 PM

Session 3 of 8 *CMM 122*
August 13
1:00 PM - 3:00 PM

Session 4 of 8 *CMM 122*
August 14
1:00 PM - 3:00 PM

Session 5 of 8 *CMM 123*
August 20
1:00 PM - 3:00 PM

Session 6 of 8 *CMM 123*
August 21
1:00 PM - 3:00 PM

Session 7 of 8 *CMM 124*
August 27
1:00 PM - 3:00 PM

Session 8 of 8 *CMM 124*
August 28
1:00 PM - 3:00 PM

REGISTER

CCIP: ENHANCE YOUR PROFESSIONAL PRESENCE

Zoom *CIP 200*

Session 1 of 2
August 12
8:00 AM - 10:00 AM

Session 2 of 2
August 19
8:00 AM - 10:00 AM

REGISTER

ETHICS MASTERY

Zoom *LDR 550*

Session 1 of 2
August 19
9:00 AM - 11:00 AM

Session 2 of 2
August 19
1:00 PM - 3:00 PM

REGISTER

CCIP: FOUNDATIONAL ETHICS

Zoom *CIP 300*

Session 1 of 2
August 26
8:00 AM - 10:00 AM

Session 2 of 2
September 2
8:00 AM - 10:00 AM

REGISTER

FOUNDATIONAL ETHICS

Zoom *CMM 130*

Session 1 of 2
August 26
9:00 AM - 11:00 AM

Session 2 of 2
August 26
1:00 PM - 3:00 PM

REGISTER

BUDGETING

Zoom *FIN 300*

Session 1 of 2
August 27
9:00 AM - 11:00 AM

Session 2 of 2
August 28
9:00 AM - 11:00 AM

REGISTER

RISK MANAGEMENT

Zoom *INS 400*

Session 1 of 2
September 2
9:00 AM - 12:00 PM

Session 2 of 2
September 3
9:00 AM - 12:00 PM

REGISTER

ENHANCE YOUR PROFESSIONAL PRESENCE

Zoom *CMM 200*

Session 1 of 2
September 2
1:00 PM - 3:00 PM

Session 2 of 2
September 3
1:00 PM - 3:00 PM

REGISTER

ETHICS MASTERY

Zoom *LDR 550*

Session 1 of 2
September 9
9:00 AM - 11:00 AM

Session 2 of 2
September 9
1:00 PM - 3:00 PM

REGISTER

ADVANCED ETHICS

Zoom *LDR 500*

Session 1 of 2
September 10
9:00 AM - 11:00 AM

Session 2 of 2
September 10
1:00 PM - 3:00 PM

REGISTER

FOUNDATIONAL ETHICS

Zoom *LDR 500*

Session 1 of 2
September 11
9:00 AM - 11:00 AM

Session 2 of 2
September 11
1:00 PM - 3:00 PM

REGISTER

CALIFORNIA LAW

Zoom

Session 1 of 8 *CMM 121*
September 16
9:00 AM - 11:00 AM

Session 2 of 8 *CMM 121*
September 17
9:00 AM - 11:00 AM

Session 3 of 8 *CMM 122*
September 23
9:00 AM - 11:00 AM

Session 4 of 8 *CMM 122*
September 24
9:00 AM - 11:00 AM

Session 5 of 8 *CMM 123*
September 30
9:00 AM - 11:00 AM

Session 6 of 8 *CMM 123*
October 1
9:00 AM - 11:00 AM

Session 7 of 8 *CMM 124*
October 7
9:00 AM - 11:00 AM

Session 8 of 8 *CMM 124*
October 8
9:00 AM - 11:00 AM

REGISTER

BASICS OF ASSOCIATION MANAGEMENT (BAM)

Zoom

Session 1 of 8 *CMM 101*
September 16
1:00 PM - 3:00 PM

Session 2 of 8 *CMM 101*
September 17
1:00 PM - 3:00 PM

Session 3 of 8 *CMM 101*
September 23
1:00 PM - 3:00 PM

Session 4 of 8 *CMM 101*
September 24
1:00 PM - 3:00 PM

Session 5 of 8 *CMM 102*
September 30
1:00 PM - 3:00 PM

Session 6 of 8 *CMM 102*
October 1
1:00 PM - 3:00 PM

Session 7 of 8 *CMM 102*
October 7
1:00 PM - 3:00 PM

Session 8 of 8 *CMM 102*
October 8
1:00 PM - 3:00 PM

REGISTER

Please Note: In order to receive CEU course credit all modules within the course must be completed.

Thank you to our SPONSORS

Thank you to our sponsors for the first quarter of 2025 (January 1 - March 31) for their generous contributions. The next time you encounter a CACM Sponsor, please join us in acknowledging the work and generosity of these supportive members.

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Next Level BS Painting
OCBS, Inc.
Optimal Outsource, an OSG Company
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PCW Contracting Services, Inc.
Performance Systems Integrations
Platinum Security, Inc.
Precision Concrete Cutting
Precision Construction and Painting
Precision Roofing & Waterproofing, Inc.
Prestige Paving Company
ProTec Building Services
RealPage for Associations
Recon360
Restoration Management Company
River City Reconstruction & Painting
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