

FALL 2024

THE VOICE OF
THE CALIFORNIA
COMMUNITY
MANAGEMENT
INDUSTRY

ON AIR

The HOA Life Podcast- Tune in!

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Vision

THE VOICE OF THE CALIFORNIA COMMUNITY MANAGEMENT INDUSTRY

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SB 721 focuses on the safety of Apartment buildings, requiring thorough inspections of balconies and elevated structures. The deadline for these inspections is every six years.

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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

Have you checked out our new podcast? CACMChat: The HOA Life was made with you in mind and aims to be a resource for anyone in the industry! Read all about it on page 15.



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This edition of Vision Magazine highlights the importance of elevating education, and I can't help but rally behind this topic and notion. As community managers, furthering our education in a multitude of ways is one of the most powerful tools we can equip ourselves with. Whether we look toward earning more certifications, networking with fellow managers or industry partners, or staying in the know of all things in the CID industry, education is always at the forefront.

One thing I find significantly important to educate each other on is the California insurance market. Changes are happening fast and furious, so it is important we all stay well-informed and aware. CACM has been successfully working with multiple insurance coalitions and the California Insurance Commissioner, Ricardo Lara, to enact change. With the FAIR Plan's coverage expanding we recognize the benefit, but we do not dismiss the continuous work that needs to be done. We too are elevating our education and brainstorming additional approaches to stabilize the integrity of the insurance market for your HOA clients. To stay informed on these updates, be sure to head to our California Insurance Regulations Update page or look at our website for updates.

Another way to stay informed on this topic and more is subscribing to our brand-new podcast CACMCHAT: The HOA Life. With this podcast we hope to not only elevate your education by sharing tips and tricks from industry experts, but also aiming to elevate the industry as a whole. This is a resource for you to become a well-versed "personality" manager, which is what I refer to managers as in episode one, because we are!

At the end of the day, keeping our finger on the pulse in this industry is only one key component to being a strong manager. Continuously pursuing education and having a desire to learn more will be an extremely beneficial thing not only in this industry but in life. I hope this edition ignites something in you to continue learning and elevating yourself, each and every day!

Thomas Freeley, CAMEx, CCAM
CEO of CACM

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Action Property Management Turns 40!

Action Property Management celebrated their ruby anniversary. The ruby anniversary marks 40 years, an amazing milestone to achieve. As a team, they celebrated four decades of unwavering dedication to helping people love where they live, and they thank everyone who has contributed to their success. They stated that “we are so proud of how our team members live out of foundational values of caring about people, embracing innovation and creativity, pursuing excellence, and being a part of the team.”



Christina Mercer

Congratulations to Christina Mercer, CCAM, on Promotion

Congratulations are in order for Christina Mercer, CCAM, on her new promotion to Division Vice President, San Diego at PMP Management. Prior to this role, Mercer was the Director of PMP Urban, San Diego where PMP Management said she excelled. Brad Watson, President and CEO of PMP Management is excited to watch her thrive in this role and states, “Christina’s service-centric approach to community management coupled with her passion for mentoring and developing our San Diego team make her the perfect cultural fit for PM and this role.”

Antis Roofing & Waterproofing Celebrates 35 Years with a Roof Giveaway



Antis Roofing & Waterproofing announces the celebration of their 35-year anniversary with a once in a lifetime giveaway. Offering a roof to one of the thousands of nonprofits in Southern California, stating they should not have to worry about roof leaks. The giveaway started on August first and had a three-month nomination period where nominations were accepted for a 501c3 nonprofit in need of a new roof. Founder and CEO Charles Antis said, “We salute them, and like them we want to do whatever is needed to build bridges in the community.” The winner will be chosen and announced November 4, 2024.

**Celebrating Our
6th year in Business
Women owned business**



Bonnie Basham
CAMEx, CCAM.PM.AA.CI.CAFM
President



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Basham Management Celebrates 6 Years with a Magazine Feature

Basham Management turned six years old! They announced this celebration on their social media while also recognizing their company president Bonnie Basham, CAMEx, CCAM.PM.AA.CI.CAFM for her feature in the Bakersfield Life Magazine. Basham and her business were recognized in the magazine in their “Women in Business” section. They stated it was an amazing honor.



3 New Leaders Added to the CINC Systems Team

CINC Systems announced the addition of three new faces to their leadership team this summer. The expansion of the team was specific, strategic, and designed to support the company's continued growth. These additions include Ashley Berenson as Chief Product Officer, John Granara as Chief Financial Officer, and Gay Beach as Chief Marketing Officer. CINC CEO Ryan Davis said, "Each new leader brings decades of experience that will augment CINC's ability to make the business of community management less tedious and more meaningful."



She Said I Do!

The wedding bells are ringing! CACM Member and CACM Board Secretary Chistina French, CAMEx, CCAM-LS.HR.PM.AA.LM, CAFM said 'I Do' on June 22. French married Solo Hokafonu, officially making her Christina French-Hokafonu. Wishing her and her husband many years of wedded bliss. Congratulations!



Colleen Montoya

Longtime Community Manager Colleen Montoya Now Heads Sales at Whit's Paintings

Whit's Painting welcomed a new Director of Sales and Client Relations, Colleen Montoya, CCAM-HR-CI. With nearly 20 years of experience in the industry, Montoya will now be poised to utilize her background in property management to drive sales growth and enhance client relationships. Whit's painting stated that, "Her profound understanding of property owners' needs and challenges positions her uniquely to align Whit's Painting services with client expectations effectively." Whit's Painting is very excited to welcome her to the team.

HOA Organizers Recognized as One of the Best Places to Work

HOA Organizers Inc. was recently recognized as one of the best places to work in Los Angeles. Out of a list of 100 different companies, they were ranked 14th in the best small companies category by the Los Angeles Business Journal and Workforce Research Group. The company stated that this honor is a testament to their amazing team and the positive work environment they have created. "Our commitment to our employees' well-being and growth continue to drive us forward, and this recognition is a huge milestone in our journey." The company thanks everyone that makes it such an amazing place to work.





FirstService Residential Acquires CitiScape Property Management Group

On June 11, FirstService Residential announced that they have acquired San Francisco based property management group **CitiScape Property Management Group LLC, APMC**. President of FirstService Residential, Amy Mathieson, stated that this partnership meets their strategic objective in two ways. "Allows us to vastly expand our San Francisco and East Bay business portfolio while it also provides us with a seasoned and experienced set of business leaders who will be an important part of our future growth and service delivery."



Courtney Mack Promoted at Silvercreek Association Management

Silvercreek Association Management celebrated a promotion within the company in August. Courtney Mack was promoted to Senior Team Manager from her previous position of portfolio manager. The Silvercreek Association Management team said that Mack has a bright future ahead in this role and that, "Your passion and dedication are the driving forces behind our success." Congratulations Courtney!



Courtney Mack



baby Ace

Soknay Lim



Maynard Rich Management Company Manager Welcomes First Baby

Maynard Rich Management Company manager, Soknay Lim, CCAM, welcomed her first baby to the world. Baby Ace was born on May 31st at 12:30 a.m. His favorite things other than sleeping are taking long baths and making funny faces at two in the morning. Just two weeks before his arrival, Soknay even attended the CACM Northern California member dinner. Sounds like Ace is ready to be a CACM member too! Congratulations Soknay and welcome to the world Ace.

Harvest Landscape Makes the Top 150, Announces new COO

Harvest Landscape Enterprises, Inc. celebrated their ranking in Landscape Management Magazine's list of top **150 largest landscape companies**. The results of the list produced by the magazine are decided off of the industry's top revenue-generating firms, including individual company figures. Harvest Landscape Enterprises, Inc. was recognized as spot number 77. Congratulations Harvest Landscape team for this amazing recognition. The company also announced the appointment of Mike Scorsone as Chief Operating Officer. This is a new position that was created to "support and steer the company's dynamic growth in the commercial landscape industry." Scorsone has a 23-year career in commercial landscape and is eager to focus on the core of service delivery, create new operational efficiencies and more. CEO Steven Schinohofen stated that Scorsone's unique perspective on landscape management and his commitment to putting customers first align with the company's values perfectly. "His leadership will guide our teams at the ground level, streamline operations, and ensure we continue to deliver top-notch service to our clients."



Mike Scorsone

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Source: 2024 Great Place to Work Trust Index Survey



Keystone Moves into New Office, Recognized as Great Place to Work

Keystone Pacific Property Management, a new member since June 7, announced on LinkedIn the move to a new office in Irvine, California. The team sated “Can’t wait to serve our clients and meet our vendor partners at our beautiful new location.” Keystone explained that this new location is complete with an office space, sports courts, fitness center and even a café. Their new office is now located at 240 Commerce, Irvine, CA 92602. The company was recently recognized as a Great Place to Work and was officially **GPTW Certified by the 2024 Great Place To Work Trust Index Survey**. The company was recognized for having 82% of their employee say it is a great place to work, which is about 25 points higher than the average U.S. company employees satisfaction rate. CEO Cary Treff stated that, “We realize that a great customer experience comes from a great employee experience, and our team at Keystone is proud to have built a culture that reflects our core values of servant leadership, building great relationships, exceeding expectations and employee empowerment.”



Rebecca
McDonald

Rebecca McDonald Promoted at Walters Management, APMC

Congratulations are in order for Rebecca McDonald, CCAM-LS, who was recently promoted to Senior Vice President, Operations at **Walters Management, APMC** within the RealManage Family of brands. McDonald has been at Walters for the past decade and the team is excited to wish her continued success. “Rebecca has shown exceptional dedication and a strong work ethic in the community management industry,” the company stated. “Her commitment to excellence has been instrumental in the ongoing success of the company.”

Super Lawyer for the Third Year

Congratulations to Tim Flanagan, Esq., of **Flanagan Law, APC!**

Tim was named a **Super Lawyer for the third year in a row**. Super Lawyers recognizes the top attorneys nationwide, across a variety of practice areas and firm sizes. The selection process selects attorneys on an annual, state-by-state basis using peer nominations and evaluations combined with independent research. This accolade is earned by only 5% of the legal industry.

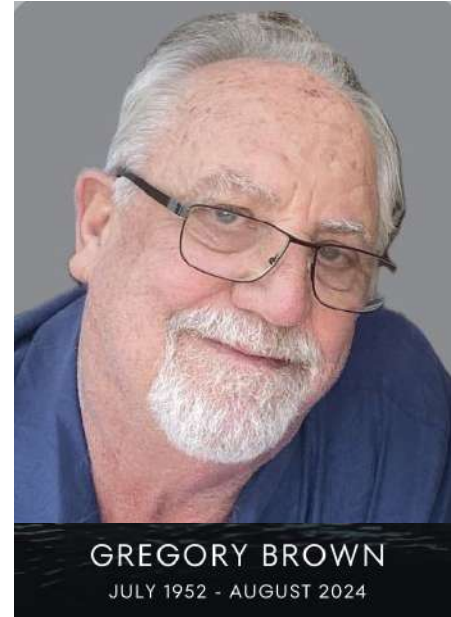


Trifecta Association Management Opens New Onsite Location

It’s official! Trifecta Association Management announced their onsite location and opened their doors with a launch party. Their launch party came just about four weeks after the announcement of their onsite location in San Francisco. Trifecta Association Management took to LinkedIn to share launch party updates where they shared what a wonderful day it was taking a ‘peanut of an idea’ to making it official. “We are thrilled to be in the SF space and also to have such great vendor partners,” the team stated. The team includes members Maj Messiah, CCAM, Sabrina Leglu, CCAM, and Helen Castro, CCAM. Their offices are located at 1485 Bayshore Blvd. Suite 458, San Francisco, CA 94124.

Industry Mourns Loss of G.B. Group Inc. Founder Gregory Brown

The G.B. Group, Inc. and the industry at large mourned the passing of Gregory Dean Brown, the company's founder. Brown passed away on August 27 after a long battle with cancer. A longtime resident of Santa Clara County, he was the founder of The G.B. Group General Contractors of Gilroy and later opened offices in Las Vegas, Sacramento, Pleasanton and Oxnard. He gained his experience building high-rise hotels for 20 years. Together with his wife, Regan, they built and developed G.B. Group, serving thousands of homeowners' associations. Their sons successfully run the company today. He is survived by his wife Regan, sons Ryan, Russell and Jesse, and other family members.



Walters Management, APMC Promotes Deena Arvizu

Congratulations to Deena Arvizu, CCAM! **Walters Management, APMC** recently promoted her to the Regional Vice President of their South County market. After 22 years with the company, Walters Management stated on their socials this was a well-deserved promotion and she has been an integral part of the team. "Her unwavering dedication, hard work, and loyalty to both the company and our clients are truly unparalleled." Wishing you continued success in this new chapter Deena.



Seabreeze Management Company Acquires Amber Property Management

Seabreeze Management Company recently announced the acquisition of Amber Property Management. Amber Property Management is located in Mission Viejo, California and with this addition, the Seabreeze Management team now consists of over 700 colleagues serving nearly 750 associations and over 150,000 residential and commercial properties. Seabreeze Management Company's CEO, Isaiah Henry, believes that Amber is a great fit for their organization. "Amber's reputation and standing in the industry are unmatched, and I've watched them serve their clients well for years," Henry said. "We look forward to serving our communities together and to a long prosperous relationship."



Vantaca Promotes New Chief Technology Officer

Vantaca announced the promotion of their new Chief Technology Officer, Jeff Beard. Vantaca stated that they're excited and can't wait to the amazing things that Beard will continue to achieve in his new role. "Jeff's exceptional leadership and innovative vision has been instrumental in driving our technology forward." Cheers to continued growth and success, congratulations Jeff!

roundtable

A MESSAGE FROM THE BOARD

This fall edition of Vision Magazine has a theme focused on education and the tools to elevate the processes.

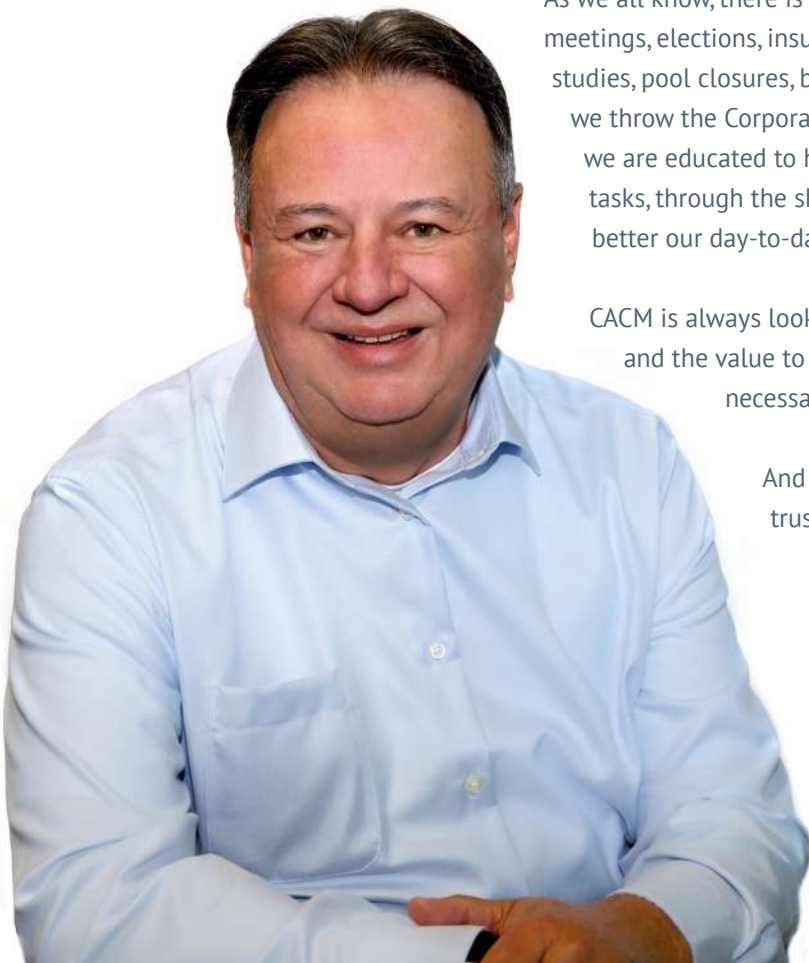
This is one of the areas of discussion that we had this week as we were planning for the CACM Fall Forums and how to elevate education through additional levels of engagement.

The goal is to be able to leverage our expert knowledge through an engaging, interactive sharing process - i.e. forums. The more we share and learn from each other's experience, the better our industry becomes. We are working to put additional tools into our manager tool belts that enable us to aid our boards through the challenges of today. This would include the tool of knowing who those experts are in advance to be called to aid in the board education process. We are not expected to be the experts in everything - even though some people may think that we should be - but we are expected to know who those experts may be.

As we all know, there is a lot going on in the fall - budgets, annual meetings, elections, insurance renewals, deck inspections, reserve studies, pool closures, board meetings, landscape walks, etc. and now we throw the Corporate Transparency Act into the mix. The better we are educated to handle the time management of these many tasks, through the sharing of experiences and best practices, the better our day-to-day experience in the industry will become.

CACM is always looking for ways to improve the educational experience and the value to the continual learning process that will be necessary for success in our ever-changing industry.

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



A handwritten signature in black ink that reads "Joseph A Price".

Joe Price, CAMEX, CCAM
CACM Board Chair

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



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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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Follow @CACMchat



"Thank you CACM for providing great education and the opportunity to learn more to help me be a better community manager."

— Kira McCoy, CCAM, Associa
Northern California

"It's inspiring to see our community come together to make an impact in Southern California. A big thank you to Alia Saouli and CACM for organizing this wonderful initiative. Facility Masters is grateful to have been able to contribute to this wonderful cause!"

— Eric Christiansen, Facility Masters Southern
California Division President

"Thank you CACM for truly knocking it out of the park! Our families and case managers are in awe of all the back-to-school supplies stuffed in their backpacks! Thank you for supporting The Priority Center and directly impacting the at-risk children and families we serve."

— The Priority Center



"Had an amazing time at the CACM Knowledge Sharing Lunch sponsored by Action Asphalt Paving & Maintenance Inc. and Valet Living. Big thanks to Tom Freeley and Natasha Fierro for sharing valuable #industry insights. Feeling blessed to be part of this amazing #community and #grateful to do what I love."

— Dan Fernandez, Action Asphalt
& Concrete, Director of Business
Development and Marketing



"Celebrating my new certification as a California Certified Industry Partner! Thank you CACM for giving industry partners the opportunity to learn more about community management and certifying us while doing it!"

— Cierra Boaz, CCIP



"We were thrilled to welcome Tom Freeley, Melissa Hurtado, Lori Santillan and Alia Saouli from CACM, to our brand-new Keystone Pacific Property Management office today. It was fantastic to discuss the exciting opportunities and collaborations ahead for Keystone and CACM."

— Matthew Williams, CCAM, COO at Keystone
Pacific Property Management



"So far this Summer has been full of amazing people and opportunities. We appreciate our trade organizations CACM, CAI, BAYCEN and Echo for providing fantastic spaces for learning, connecting and growth. A big shoutout to the managers that we continue to partner with, we value you! The future is bright, and we are just getting started!"

— Recon360

WE ARE LIVE!

CACM'S FIRST EVER PODCAST IS HERE



If you haven't heard the good news, we have joined the world of podcasting! Our first podcast, CACMCHAT: The HOA Life, launched September 10th and we are excited as ever.

This weekly podcast will be geared toward anyone interested or involved in community associations. It aims to bring stories, trends and best practices from professionals who work in the California community association management industry. No topic is off limits.

When you tune in, you can expect to hear discussions on a wide range of topics. Things such as reducing burnout, budgeting, reserve management tips, dealing with conflicting board members and more. Our host and CEO, Tom Freeley, states that one of the main goals of the new show is to elevate the industry.

"One of the issues that we want to address is the reality behind community association management and what a manager actually goes through on a day-to-day basis."

Episodes will also cover the ever-changing laws in the HOA Industry, new technology and the evolving workforce. Listeners can expect guests on different episodes to help weigh in and navigate these topics.

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

You can subscribe to the podcast directly from our website, where you can also submit questions and topics for consideration at podcast@cacm.org. If you haven't yet, be sure to listen to our first few episodes and subscribe today!



Apple Podcasts



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**THE BEST
OF THE BEST
WILL BE
RECOGNIZED AT
OUR UPCOMING
LAW SEMINARS
IN 2025**

ABOUT THE VISION AWARDS

The Vision Awards are the highest distinction bestowed upon California community managers and industry partners. The awards program identifies those who exemplify the very best in the profession of community management; honors their contributions to the profession; and recognizes the positive difference that they have made in the lives of their colleagues, association homeowners and the communities they serve.

Recognize members of the industry for their hard work and dedication to their profession through a Vision Award nomination. CACM's Vision Awards are the industry's highest honor, and a nomination is the ultimate way to be recognized for superior leadership within our industry.

Nominees will be showcased in CACM communications offering them increased visibility and recognition in the California community management industry. Winners will be honored and receive their awards at the Northern and Southern California Law Seminars next year!



Submit Your Nominations for the 2025 Vision Awards!

Is there a **community manager** or **industry partner** who has gone the extra mile this year? Then submit them for a Vision Award for 2025!

THE AWARD CATEGORIES

- Rising Star
- Innovator
- Leadership
- Educational Excellence
- Company Culture

WHO IS ELIGIBLE FOR NOMINATION?

Nominees include community managers, management companies and industry partners who exceed the highest standards of professionalism and skill, display a commitment to excellence, and exhibit high ethical standards.

*The 2025 Vision Awards recognize achievements from November 1, 2023 through October 31, 2024. The deadline for nominations is **November 1, 2024**.*

DOWNLOAD NOMINATION FORM

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 Certified Community Association Managers (CCAM), Certified Community Association Financial Manager (CAFM), California Certified Industry Partner (CCIP) and Specialty Certificate recipients for the period of May 18th, 2024 through August 15th, 2024.

CCIP

Adam Earp, CCIP
Amanda Om, CCIP
Cecilia Garza, CCIP
Christopher B. Booth, CCIP
Cierra L. Boaz, CCIP
Justin Hall, CCIP
Stefan Murphy, CCIP

CCAM

Adriana L. Leon, CCAM
Alejandra Torres, CCAM
Alicia M. Bernardi, CCAM
America Barajas, CCAM
Anabel Estrada, CCAM
Angela A. McCambridge, CCAM
Angelica E. Cardoza, CCAM
Anna L. Wachtel, CCAM
Anthony Rex, CCAM
April Silva, CCAM
Bettie Berdugo, CCAM
Bettsi Ledesma, CCAM
Brianna M. Lopez, CCAM
Caroline A. Cormier, CCAM
Chantal Alvarez, CCAM
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Paula B. Arciga, CCAM
Rigoberto Bazan, CCAM, CAFM
Samantha Soogian, CCAM
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Valerie Benkie, CCAM
Vlad Simonenko, CCAM
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CAFM

Chelsea Y. Carpenter, CAFM
Jack Wang, CCAM, CAFM
Nicole Pendleton, CAFM
Rigoberto Bazan, CCAM, CAFM

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Ben Sloman, CAMEX, CCAM
Kimberley Flickner, CAMEX, CCAM-PM.
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COMMERCIAL & INDUSTRIAL CID

Laura, Hurtado, CCAM-PM.CI

LARGE SCALE

Stephanie Sena, CCAM-LS.LM
Robert Sides, CCAM-HR.LS

LIFESTYLE MANAGEMENT

Stephanie Sena, CCAM-LS.LM

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Andrea Pulizzi, CCAM-PM, CAFM
Jeff D. Couwenhoven, CCAM-ND.PM
Karina Tatum, CCAM-PM
Kevin Chu, CCAM-PM

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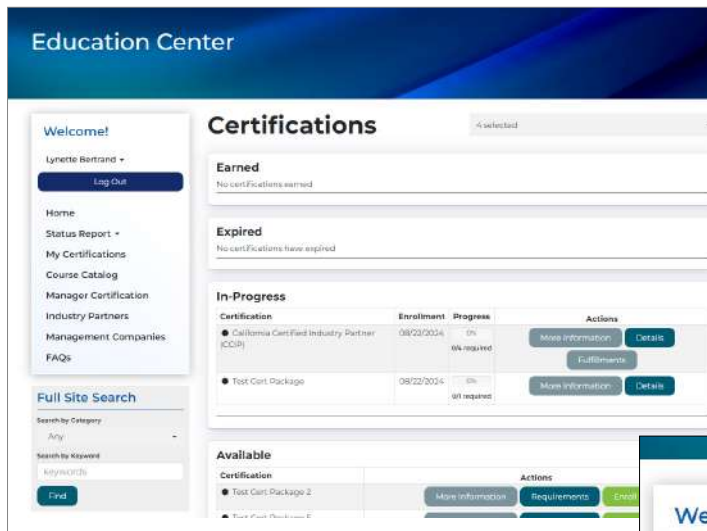
(JANUARY 1 2024 – AUGUST 15TH, 2024)

Gordon Goetz, CAMEX, CCAM-Emeritus
Gloria Kirkwood, CCAM-Emeritus
Karen Martinez, CAMEX, CCAM-Emeritus
Karen Carr, CCAM-Emeritus
Michael Walker, CCAM-Emeritus
Sharron Badham, CCAM-Emeritus

And We Are Live!

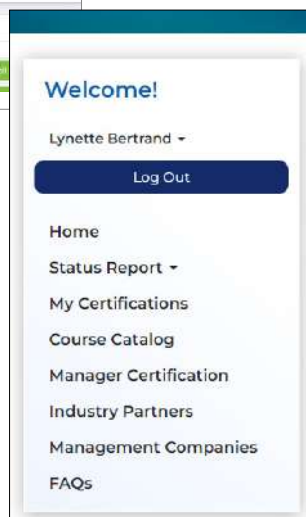
The New Education Center and What to Know

It's here! Our new Education Center is now live and can be accessed at **education.cacm.org**. This Education Center was specifically designed with you in mind, and it is your one-stop-shop to all things education. Here, you can access course information, course materials, certifications and more. As exciting as this new Learning Center is, there are a few first steps you need to know before exploring.



1. Login and Enroll

After October 1, log in to the **Education Center**. You will utilize the same login that you use for your member portal. If you are unaware of your member portal login or don't remember, reach out to **membership@cacm.org** for help beforehand.

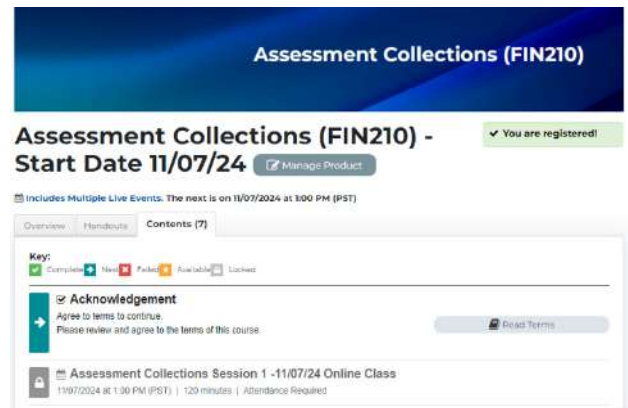


Now that you are logged in, you will want to click on 'My Certifications' on the left-hand side of the page. There you will be able to access certifications you have already earned, in the process of earning or expired. If you want to begin earning a new certification, this is where you can enroll in a new certification path.



2. Check out the Dashboard

After navigating the certifications page, you will want to click your Status Report and from there you can head to the Dashboard. When you access the Dashboard, you will see the course and events you are registered for. By clicking on each course, you will be able to see the overview of the course, course handouts available to you to download, and a breakdown of each session. The breakdown of these sessions includes details on online class times and dates, instructor surveys, and exams.



3. Acknowledgement Required

The one thing you may notice upon the course overview is that some session details are locked. To access these, as well as receive class reminders via email, you must click the acknowledgement. Without clicking and thoroughly reading the acknowledgement, you will not be able to fully access course materials. This acknowledgement also provides you with information on session attendance, Zoom information, and more. This acknowledgement is one of the most important things that the education team needs from you to ensure that you have the best experience possible while navigating the new Learning Center. You won't have access to this acknowledgement until you register for the course.

The Education Center is new for all of us and was built with you and your education in mind. You can access the Education Center directly from our website or you can head to education.cacm.org. Take the opportunity to navigate the Education Center and familiarize yourself with it.

FAQs

Have a question about how to register for a class or event? How to access your registrations? How to recertify? Head over to the FAQs section on the lefthand side menu of the Education Center. If you can't find a particular answer for your question, email education@cacm.org.

EMAIL NOTIFICATIONS!

One of the cool new features of the new Education Center is that you will receive multiple reminders leading up to your course or event.

COURSE MATERIALS AND CLASS ZOOM LINKS

One key change from our previous process is that materials will no longer be emailed to you, but they will be accessible directly in the Education Center. Students can download all course materials prior to each class from the **Handouts tab** found in the course they registered for in the Education Center. The Zoom links to all online courses will also be available in the Education Center, so no more searching for that email with course details, it's now all at your fingertips!

Stay informed: Essential CID legislation updates.

By Jennifer Wada, Esq.

The Legislature wrapped up the 2024 Legislative Session on August 31st, acting on bills right up until the midnight deadline. Topics ranged from AI regulation to affordable housing to cannabis cafes to a plastic bag ban. On the last day of session, Governor Newsom also called for a special session on gas prices, which is currently in process.

It was a wild legislative session for the CID industry. There were a number of bills that would have negatively impacted managers, but we were able to either stop them or get them significantly amended to make them palatable. There were also a number of good bills for the industry. The Governor's deadline to sign or veto legislation was September 30th, here is how the most important CID bills fared this year.

AB 2114 Irwin: Balcony Inspections

This bill was sponsored by CAI-CLAC and authorizes a licensed civil engineer to conduct balcony inspections in addition to structural engineers and architects. AB 2114 has already been signed by the Governor. Because it had an "urgency" clause in it, it takes effect immediately. In other words, as of July 15th when it was signed, associations may hire licensed civil engineers to conduct balcony inspections.

AB 2159 Maienschein: Electronic Voting

This bill would authorize a board to adopt an operating rule to allow elections by electronic secret ballot notwithstanding its governing documents. This bill ran into some difficulty on the Senate side. In addition to opposition from the Center for Homeowner Association Law and the California Alliance for Retired Americans, an organization called Verified Voting stepped up its opposition efforts. Verified Voting's mission is to "promote the responsible use of technology in elections." While they are not specifically focused on associations, they viewed the bill as a threat to election security and claimed that electronic ballots compromise the integrity of elections since they can be intercepted, deleted or altered. CACM assisted CAI-CLAC, the sponsors of the bill, in advocating with members of the Senate Housing and Judiciary committees. We were able to get the bill out of both committees, but the bill was amended to require, when applicable, individual notice

to members of their ability to opt-out "at least 30 days before the deadline to opt-out." Amendments were also taken to clarify that the operating rule must include certain things, such as permitting a member to opt-in or opt-out based upon whichever method the association chooses. In other words, if the association adopts a rule to allow electronic voting, the association must choose either an opt-in option or an opt-out option. AB 2159 was signed by the Governor and becomes effective on January 1, 2025. Finally, there is an alternative to the written secret ballot!

AB 2460 Ta: Quorum Bill Cleanup

This bill makes technical changes to the law that allows for a reduced quorum of 20% if quorum is not initially reached. AB 2460 would amend the statutory notice provisions to clarify that upon failure to achieve quorum on the first attempt, the association may reconvene a subsequent meeting at which time the quorum will be 20%, unless the governing documents of the association provide for a lower quorum. This bill was signed by the Governor and becomes effective on January 1, 2025.

AB 2996 Alvarez: FAIR Plan

This bill originally contained provisions that required the FAIR plan to develop, maintain, and offer to sell common interest development policies with limits up to \$20 million per structure. Unfortunately, these provisions were amended out of the bill and it instead, would have authorized the FAIR

Plan Association to request the California Infrastructure and Economic Development Bank to issue bonds to finance the cost of claims and increase liquidity and capacity. Because of interhouse politics, this bill did not make it out of the Legislature. The good news is that the Insurance Commissioner is officially moving forward with **expanding the FAIR Plan's commercial plan** with coverage up to \$20 million per building, with a total aggregate of \$100 million per location. Currently, the FAIR Plan only authorizes up to \$20 million per location. We applaud the Commissioner's action as it will increase the stability of the FAIR Plan and provide associations with more coverage options. We acknowledge, however, that more needs to be done to address the fundamental insurance issues facing the industry. We will continue to work on additional approaches to stabilize the integrity of the insurance market.

SB 900

Umberg: CID Repair and Maintenance

This bill is a response to the situation that occurred at the La Veta Monterey condominium complex in Orange, CA regarding a gas leak and subsequent confusion about responsibility. This resulted in the residents going without gas for months. SB 900 originally made the association strictly liable for repairs

and replacements related to gas, heat, water and electrical services. CACM strongly opposed the original version of the bill. After extensive discussions with the author, CACM and CAI were able to get amendments that state the association is responsible unless otherwise provided in the declaration, or unless the utility service that failed is required to be maintained, repaired, or replaced by a public, private or other utility service provider. New amendments clarify that nothing changes the legal duty or obligation of a utility company or local government to repair or replace items pertaining to utility services. The board must commence the process of making repairs and replacements within 14 days. If a vote to commence repairs doesn't take place within this period, and if there are insufficient reserves, an association may obtain a loan without a vote of the members and may levy an emergency assessment to allow for repayment of the loan. The board may also use a reduced quorum of board members present if it can't get a quorum within 14 days. The bill expands the definition of emergency assessments to include situations where there is a threat to "personal health," in addition to safety. Associations are exempt if they are located in an area where there is a state of disaster or emergency that materially impacts the association's

ability to comply. Lastly, the bill adds gas, water and electrical service components to the visual inspections that must be done as part of reserve studies. This bill was signed by the Governor and becomes effective on January 1, 2025.

The Legislature is now adjourned until December 2nd and all energy is on the upcoming election. The presidential election is top of mind, but here in California, we are also facing significant turnover with 24 open seats in the Assembly and 11 open seats in the Senate. Having so many new members in the Legislature means CACM will be working hard post-election to educate them on the importance of community managers.



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



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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 second quarter of 2024 (April 1 – June 30.)

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Stephanie Fitivale

MANAGER PRO

Anthony Adams
Amy Alcantara
Chantal Alvarez, CCAM
Serena Bazzano
Alexandria Bellerue
Lori Bentwood
Alexandria Booker-Ward
Erin Boskovich
Eric Butler
Angelica Cardoza, CCAM
Mishelle Ceren
Felecia Chambers
Min Chang
Keldan Chick
Jenai Chin
Jennifer Cirimele-Ross
Cheri Cole
Justin Dacko, CCAM
Joseph Dallalzadeh
David Danesh
Genevieve Despres
Daniel Doyle
Kimberly Dunfee, CCAM
EricaFarris
Stacey Fite
Michael Gallagher
Nikola Garabiljević
Spencer Gilbert
Maria Gonzalez
Lori Graham
Tyler Hawkins, CCAM
Jeffrey Hayward, CCAM
Erik Hernandez
Jessica Hernandez
Laurie Hughes, CCAM
Maria Isaza

Namaad Jackson
Susan Jeong, CCAM
Daniel Khamudis, CCAM
Lydia Kim
Desiree Kupiec
Steven Lee
Adriana Leon, CCAM
Brendan Lohan
Jeffery Machado
Elissa Marcus
Natalie Martinet
April Miller
Justine Moffatt
Stephanie Montano
R. Jerod Pannell, CCAM
Sanjay Parekh
Rion Parenteau
Corley Price
Renita Primm
Christen Qingkeer
Misty Rife
Pietro Rizzuti
Ron Rodrigues
Gil Rodriguez
Monica Roe
Jasmeen Sidhu
April Silva, CCAM
Kelly Smith
Laurie Stratton
Brandon Surdock
Matthew Sutter, CCAM
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BUSINESS

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BY SCOTT SWINTON, CCIP

HOA

April 7, 1961, may not be remembered as poignantly as December 7, 1941 (Pearl Harbor), but when it comes to lessons learned, it probably should be.

In 1960 President Eisenhower had directed the CIA to begin planning an invasion. The attack was to be executed by US-trained political exiles from the target nation. John F. Kennedy took office in 1961

and was handed the reigns to, and the infamy of, what would follow.

On April 7, only a few months after JFK's inauguration, repurposed WWII bombers began an ill-fated bombing run, and an underwhelming force hit the southern beaches of Cuba. Both began taking heavy fire and pitiable casualties at a place called, The Bay of Pigs.

The Bay of Pigs is today routinely coupled with the word fiasco. Everything went wrong and things really didn't get sorted out for years.

The primary failure at the Bay of Pigs was a lack of good intelligence. With better information, the attack might have never taken place. The CIA, the generals, and the rank and file simply didn't know what they needed to know. Lives, reputations, and an escalation of the cold war were the prices paid.

THE BAY OF PIGS: HOA EDITION

I've heard that word, fiasco, not a few times over the years while working with homeowner's associations. Typically, like with the Bay of Pigs, the cause was a lack of good information. The fiasco is a botched roofing project, a chaotic board meeting, or an unfortunate interaction with a homeowner.

The HOA is legally shackled to volunteerism. This intentional distancing from the corporate business model makes room for relatively inexperienced leadership. With a humble approach, inexperienced leaders can find great success. But lack of experience does make one vulnerable to unwittingly stepping on landmines. The explosion is often preceded by a poorly planned attempt to tackle something new by the well-intended but uninformed.

Volunteer board members are to be applauded and pitied. They are valiant and vulnerable. The demands of society on its elected and paid officials are often telegraphed onto the volunteers doing their best to hold together an unruly condominium. These volunteers need all the information they can get – and their day jobs often get in the way of gathering it.

Navigating the impact of a tightening insurance market, aging buildings, and a rollercoaster economy is not easy – no less doing so under the scrutiny of all your neighbors. How many managers or board members have enough experience and information to launch a sewer lateral replacement project, source liability insurance, replace their electrical meter panels, or, heaven forbid – all of those at one time? As the multifamily inventory ages, forbidding issues never printed on the pages of reserve studies are suddenly rearing up with fangs and scales such as, cracked concrete slabs and

foundations, failed French drains, and critically rusted structural steel. Getting good advice has never been more important.

Some key intelligence is inevitably going to be overlooked. Obfuscation on the part of nefarious homeowners is probably unavoidable. The caprices of an unhappy contingent of owners are truly unpredictable. But having enough information about an upcoming change to the CC&Rs, substituting a vendor, or starting a construction project probably is achievable if the members are simply presented with the sources of that information.

Experts in all the fields of service to HOA communities are available for hire and often for free. Organizations such as CACM and ECHO are truly a click away. The decision makers don't need to go it alone, nor should they try. Following are some tips to have handy when the next decision starts to raise your heart rate:

1. ASK EXPERTS YOU TRUST.

such as your accountant or attorney, to recommend other experts each time you venture into a new decision. The days of winging it are over. The multifamily inventory is now too complicated or too old to think that your neighbors should rely on your "gut feelings."

2. ASK YOUR CONSULTANTS...

what am I missing? Collaborating with their knowledge may shed light on other concerns before they become catastrophes.

3. ENCOURAGE A LEARNING CULTURE.

Expose board members, managers, and homeowners to seminars, organizations, and courses where they can find the information they need. Repeatedly present these opportunities. We humans are a proud and forgetful species. We need to be reminded and encouraged.

4. SMALL DECISIONS MAY HAVE BIG RAMIFICATIONS.

Ask experts if decisions you are about to make are as unimportant as you believe. Maybe they are. Go for it. But maybe there are some hidden pit vipers ahead and a simple question plus a bit of planning can eradicate them before you get bit.

**HOW MANY MANAGERS
OR BOARD MEMBERS
HAVE ENOUGH
EXPERIENCE AND
INFORMATION TO
LAUNCH A SEWER
LATERAL REPLACEMENT
PROJECT, SOURCE
LIABILITY INSURANCE,
REPLACE THEIR
ELECTRICAL METER
PANELS, OR, HEAVEN
FORBID – ALL OF
THOSE AT ONE TIME?**



Scott Swinton, CCIP, is the General Contractor and Certified Construction Manager at Unlimited Property Services, Inc. He has many years of lessons learned under his belt in the CID industry.



Toolbelt of Certifications

THE IMPORTANCE OF LOADING IT UP FROM CREDENTIALLED MANAGER MEMBERS

From a young age, most people are told about the importance of education and instilling the idea of continuous education inside themselves. For many, this looks like a bachelor's degree, a master's degree and maybe more. But for others, this can look a little more industry specific.

By Celeste Huecias

From a young age, most people are told about the importance of education and instilling the idea of continuous education inside themselves. For many, this looks like a bachelor's degree, a master's degree and maybe more. But for others, this can look a little more industry specific.

As community managers, it's no secret that certifications and educational opportunities are important for yourself and for your associations. For Christina French-Hokafonu, CAMEx, CCAM-LS.HR.PM.ND.AA.LM.CAFM, continuing her education was always important to her.

"I've always had a strong desire to continue my education. I strongly feel that continuing to pursue education will give you the tools you need to handle any challenges which may come your way!"

French-Hokafonu has worked in the industry for around 15 years and began her certification process at CACM 10 years ago, when she gained her CCAM. Now with several certifications under her belt, she understands the importance of education and keeping your finger on the pulse in this industry.

"It is so important to stay on top of happenings within our industry."

But she is not the only member that feels it is important to continue your education in this industry. Kimberley Flickner, CAMEx, CCAM-

PM.LS.ND.AA.CID.LM, began her career in the community management sector in 2008 and has since gained a multitude of certifications.

The reason she continues pursuing more certifications is because they help her stay current with industry trends and best practices.

"Gaining new certifications not only expands my knowledge but also strengthens my ability to serve clients and contribute to the industry," Flickner said. "I find that the learning process keeps me motivated and excited about my work."

In any educational aspect, gaining a degree or certification is only one piece of the puzzle. Putting what you studied to use in real-life situations or networking with others in the industry can help give the most valuable amount of knowledge. Along with the certifications she holds, Flickner also recognizes mentorship as another invaluable experience and source of education.

Not only do these certifications allow managers to continue learning more and staying relevant to our ever-evolving industry, but they also serve the purpose of marketing yourself to clients.

For Bonnie Basham, CAMEx, CCAM-PM. AA.CI, CAFM this is one of the many benefits to earning multiple certifications.

"I STRONGLY FEEL THAT CONTINUING TO PURSUE EDUCATION WILL GIVE YOU THE TOOLS YOU NEED TO HANDLE ANY CHALLENGES WHICH MAY COME YOUR WAY!"



"I USE MY CREDENTIALS AS A SELLING POINT FOR POTENTIAL NEW CLIENTS, AS A REMINDER TO MY CURRENT CLIENTS THAT I CONTINUE TO EMBRACE EDUCATION."



"GAINING NEW CERTIFICATIONS NOT ONLY EXPANDS MY KNOWLEDGE BUT ALSO STRENGTHENS MY ABILITY TO SERVE CLIENTS AND CONTRIBUTE TO THE INDUSTRY."



"I find the true value behind the credentials," Basham explains. "I use them as a selling point for potential new clients, as a reminder to my current clients that I continue to embrace education, and having the education to manage situations is priceless."

When it comes to these credentials, they may serve the purpose of showcasing what you learn but the most valuable thing is how much you learn and how it can help you daily.

For these three members, their certifications serve as extra tools under their belt to help them in difficult situations in a variety of areas.

Basham believes that there is not a day that goes by when she doesn't lean on and utilize the information that she has gained from one of the many classes she has been part of. For French-Hokafonu, the knowledge she has gained over the years even helps her in her large-scale onsite management role.

"It continues to assist me with keeping my mind open to other opportunities and try to understand what my fellow colleagues (community managers) are dealing with on a daily basis."

Obtaining these certifications helps educate you and market yourself in ways you may not have been able to in years

prior. So, if you have been thinking about earning a new certification or have a fellow friend that is interested, take the leap.

Trying something new can always seem scary and difficult, especially for something like this. The questions repeat in your mind with things such as "will I have enough time? Will it be difficult? How will I manage everything?" But the tough answer is that you will never know until you try.

Flickner explains that when you are feeling hesitant, sometimes you just must break it down into smaller manageable steps.

"Start by learning more about the certification and talking to others who have gone through the process."

She goes on to explain that these smaller steps can often help you feel less overwhelmed. But, to keep in mind that the effort you put in can lead to valuable personal and professional growth.

With this idea in mind, you too can become a member with a full toolbelt of certifications. The beauty of furthering your education in different ways is that it will only help you and equip you for your future in whatever industry you decide to be a part of.

Who knows what could be in the cards next for you. The more certifications you earn, the more opportunities that are open and wait for you. For these three, they are looking toward earning their MCAM and other certifications that still may be available to them.

The future is open to you and your career if you take the leap. French-Hokafonu agrees with this notion and encourages fellow members to not be afraid when considering earning more certifications.

"We never know what the future holds for us," she explains. "I just feel it is so important to take these opportunities to improve our knowledge within the industry. I always say, the sky's the limit!"



Celeste Huecias is Communications Manager at CACM, which she joined in May 2024.



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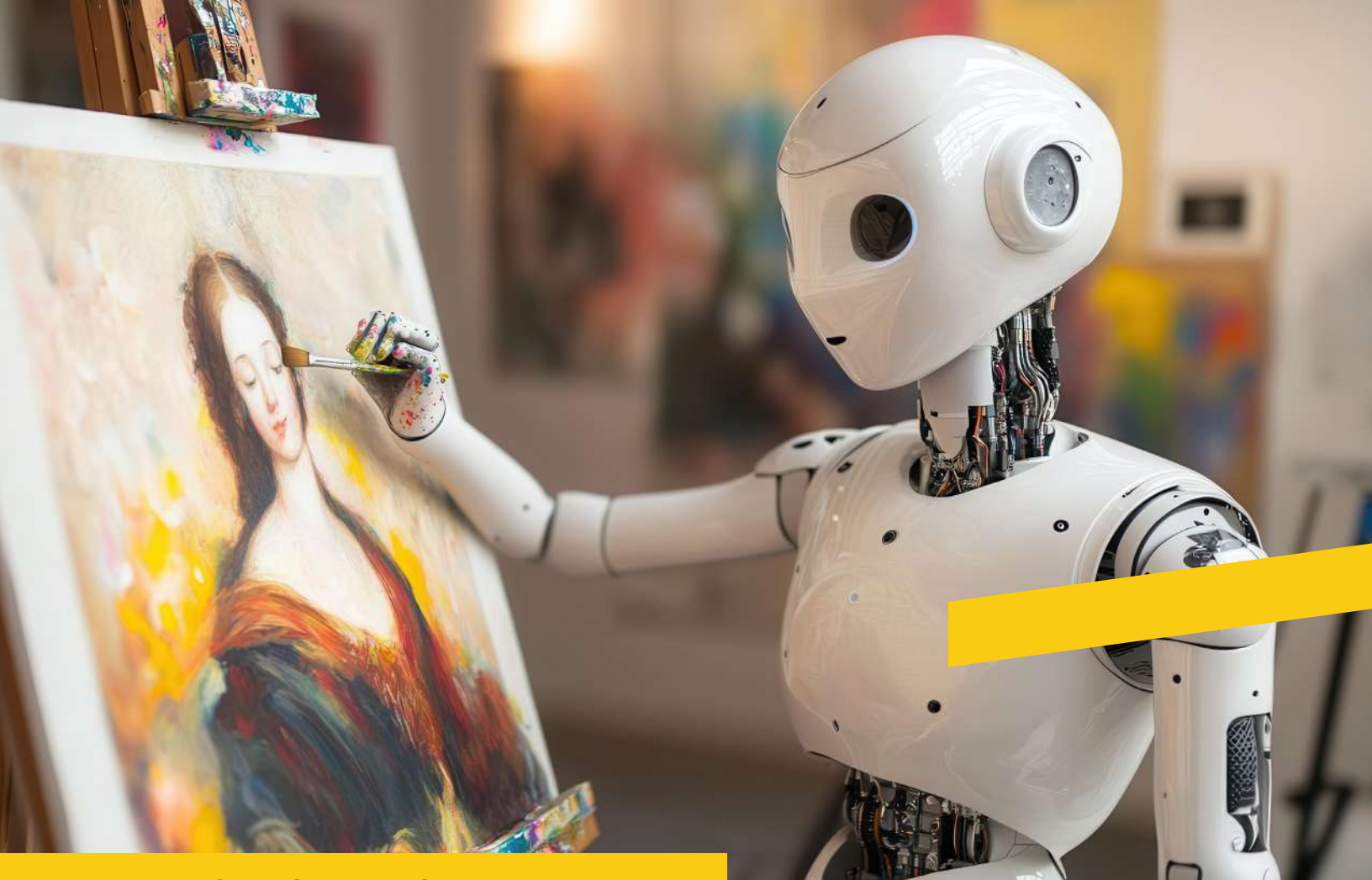


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A MANAGER'S TAKE ON AI IN THE WORKPLACE AND THE TRIUMPHS AND TRIALS THAT COME WITH IT.

By Jeff Farnsworth, CAMEx, CCAM-PM, ND

The term, "Artificial Intelligence" sounds daunting, doesn't it? Almost threatening. What is more human than our intelligence? Our ability to use what we have observed, felt, and learned to express our ideas? Some would argue that our emotional intelligence is critical to this process. Can this type of intuition be replicated? Well, like it or not, Artificial Intelligence (AI) is here, and it is quickly spreading its spindly arms into every device and application we use.

Quick disclaimer: I am a huge nerd. No cap. I remember my dad purchasing our first computer, learning BASIC, playing ZORK, sending email through PRODIGY. All the wonders of Atari Home Pong, ColecoVision, and then Nintendo. Man, I thought Nintendo was a game changer. I love technology. I built our company's first website using HTML and as I moved into my professional life, I enjoyed geeking out in attempts to leverage new technology to create more efficient processes or more creative output. I

still love technology, but with the development of AI, suddenly tech seems little less like gaming and more like HAL 9000 and Skynet.

While the term "Artificial Intelligence" wasn't coined until 1956, the concepts for mathematical models of neural networks have been floating around since the 40s. That is incredible to think about. We have all seen the evolution of the search engine and now these mathematical models are advancing to be able to learn and make their own decisions as to their output. But alas, much like the political landscape, these systems are only as good as the information they are given. In our world, this can be a very frightening concept.

TAKING AI OUT FOR A TEST

So of course, I started testing AI in the workplace. We started recording our Zoom meetings with vendors and staff and using the transcription and summary

features. We thought this could increase our efficiency if it was successful enough to use in the boardroom. However, our experience was shotty at best. The transcription was pretty accurate but only if the mic picked up the speaker, and it became challenged when multiple people spoke at once. The summary tried to make connections on its own but misinterpreted some of the information it overheard. My favorite interpretation was when our staff was talking about how we were all overwhelmed with the increase in communication and the AI summary recapped stating, "Both seemed to have reached their mental limits as indicated by (employee name's) statement about her saturated brain." While some of the summarizations were helpful and quite impressive, it was glaringly obvious that humans were still very much needed.

One of the next systems we tested was ChatGPT. If you haven't used the free version, I encourage you to

REVOLUTIONARY OR DISAPPOINTING?

test it out. There are limitations to it, but the system is a little better with the paid version. Users can ask it to write certain examples of articles, letters, poetry, lyrics, essays, fiction, almost anything you can think of. The more specific the prompt, the closer you can get to content that may be useful to you.

We found that ChatGPT made some wrong assumptions and regurgitated a lot of the same sentence structures and grammatical styles. While we were able to modify some of this, it still produced language that felt “artificial.” However, it was a dramatic time saver in terms of generating starting content that we could then edit and expand upon.

COMMON INTEREST SPECIFIC AI AND HOW IT WORKS

We are currently experimenting with a common interest specific Chatbot that uses AI technology to assist with getting information to our clients quicker. With the level of communication tripling since 2020, we are constantly looking for ways to quicken our response time. With this system, you have a closed security network and can feed it documents like CC&Rs, rules, and policies for specific associations. The user is first qualified and then routed to their association-specific system. It can integrate or not integrate with our management software. This has many pros and cons.

In testing and training the bot, we were impressed by the foundation established by its creators, and it seemed to have some very significant guard rails when it came to the answers it would give. Remember when I spoke earlier about the system only being as good as the data it is given? We quickly learned that outdated governing documents, typos in documents, and conflicting information within documents presented significant challenges in achieving the quality of output we desired.

TRAINING OUR NEWEST EMPLOYEE, AI: A WORK IN PROGRESS

We then chose to limit the types of documents it was trained on and delete, correct, and retrain documents that had typos or conflicting information. Redacting portions of a document also helped so the bot could only focus on the information we wanted to give it. We had to test it to make sure it was not bordering on offering legal advice. Luckily, some of the customization prompts allowed us to set up parameters and train it to respond to specific questions or areas of communication in specific ways.

One example of miscommunication was a community that bordered a golf course that had become abandoned and overgrown. The original CC&Rs had never been restated and still contained many references to the golf course that differed significantly from its current state. We had to train the program to answer any questions mentioning the golf course with, “I am sorry, we do not have information on the golf course, please look for communication from the association or check for updates on the association website.” Then we had to test it over and over, refine the prompt and try to get it to answer incorrectly so we could address any weakness. We continue to refine it and tailor the prompts we use and documentation to train the bot, and we are realizing some great uses for it.

We continue to test different uses of AI from workflow programs to marketing content generation. Through all our experimentation with AI we have learned to tread with caution, test frequently, and try our hardest to break any system that claims to be intelligent. Above all, machine learning may evolve, but in this humble manager's opinion, it will never replace the emotional intelligence that the human experience is able to contribute to the world.



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.



David Scott, MCAM-LS

“The MCAM has fortified my self-confidence and my credibility with our board members. I believe it is also a source of satisfaction for our management company’s owners, who generously underwrote more than half of my investment in coursework, applications, travel to classes, etc. They believe strongly in supporting education. This is embedded in our company culture.”

Becoming an MCAM sends a powerful and prestigious message not only about your depth of experience, but also your commitment to higher education and your career.

Individuals who undergo its rigorous requirements are taking responsibility to advance their own qualifications and elevate the broader community management profession.

What’s involved?

Successfully complete the following courses within three years of applying*:

- Fundamentals of Effective Governance
- Human Resource Management
- Ethics Mastery
- Advanced Insurance Principles
- Risk Management
- Strategic Financial Planning

Submit the MCAM application and successfully complete a comprehensive assessment comprised of a 100-question multiple-choice exam, written paper and oral presentation.

*You must have held your CCAM for five years before applying.

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 second quarter of 2024 (April 1 – June 30.)

INDUSTRY PARTNER PLUS

Acker Roofing

Concord | (925) 891-3331
<https://ackerroofing.com>

Bastion Security Services

San Jose | (408) 978-2198
bastionsecurityservices.com

Certified Restoration

San Diego | (619) 234-2500
certifiedrestorationinc.com

CPI Service

San Jose | (669) 205-0664
cpiservice.com

eUnify

Chandler | (480) 802-4284
eunify.net

HOA Invest

Irvine | (844) 462-4693
<https://hoainvest.com>

OC Repipes

Irvine | (866) 627-3747
<https://ocrepipes.com/>

OCERTI

Ladera Ranch | (949) 573-4074
<https://ocrepipes.com/>

Pinnacle Financial Partners

Mount Pleasant | (815) 325-8108
pnfp.com

Professional Pest Management

Eastvale | (877) 232-3055
professionalpestmgmt.com

Sequoia Construction Services, LLC

Walnut Creek | (510) 635-2669
sequoiaconstructionservices.com

INDUSTRY PARTNERS

Adams Brothers Pool Plastering, Inc.

Garden Grove | (800) 201-2326
adamsbros.com

AWT Roofing, Inc.

Benicia | (707) 590-6506
awtroofing.com

Cedar Construction Management

Concord | (650) 576-4248
cedarcmm.com

Colony Landscape & Maintenance, Inc.

Alviso | (408) 941-1090
colonylandscape.com

Community Risk Management

Folsom | (619) 944-2011

Hennigh Law Corporation

San Francisco | (415) 325-5855
<https://hennighlaw.com/>

Hometime Windows and Doors

Upland | (919) 896-1765
hometimewindows.com

iFlow Inc.

Santa Ana | (888) 651-1130
iflowinc.com

Lead Star Security, Inc.

Sacramento | (916) 971-6218
<https://leadstarsecurity.com/contact/>

Nano Banc

Irvine | (213) 393-7823
nanobanc.com

Protection Control, Inc.

Rancho Cucamonga | (800) 232-1406
pcicctv.com

Safeguard On Demand, Inc.

Fountain Valley | (714) 650-7193
safeguardondemand.com

Tri-Tech Restoration & Construction Co., Inc.

Burbank | (818) 565-3900
tritechrestoration.com

Urbanscapes Landscape Company, Inc.

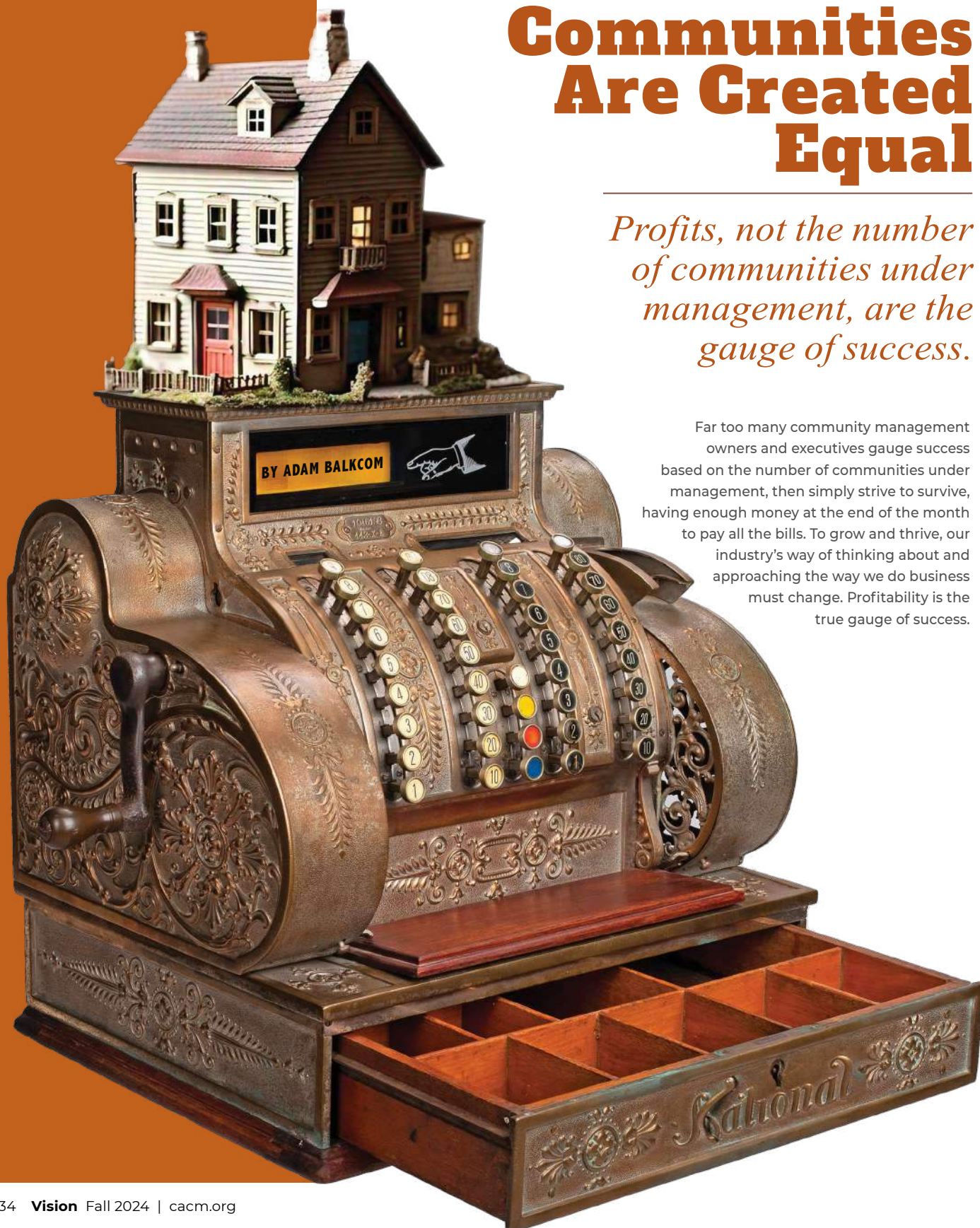
Mountain View | (408) 676-7993
urbanscapeslandscaping.com



Not all Communities Are Created Equal

Profits, not the number of communities under management, are the gauge of success.

Far too many community management owners and executives gauge success based on the number of communities under management, then simply strive to survive, having enough money at the end of the month to pay all the bills. To grow and thrive, our industry's way of thinking about and approaching the way we do business must change. Profitability is the true gauge of success.



Our membership benchmarking found typical profits for community management companies to be:

- Average: 8 to 10%
- Well-Performing: 20 to 25%
- Best: 45%+

Communities under management with healthy profits can reinvest into their companies to improve operations, rev up business development and bonus high performing team members.

Not All Communities Are Created Equal

An important driver of overall profitability is your profitability per community. While there is no single exact measurement tool, at CAM Leadership Institute, we have several tools that yield good estimations to provide enough data to make the strategic decisions needed to improve overall profitability. One of the first tools we empower our members with is called the Total Value of Relationship tool.

This tool takes the total revenue that you generate for each of your communities (base management fee plus Schedule A plus any other ancillary revenue you receive for each community), adds all the revenue created from all communities, and then divides the list into 25% revenue segments.

This way, you can see which communities are generating 25% of your revenue. Many owners are shocked to see how their communities lay out into the different quartiles.

Total Value of Relationship Tool Insights

HOW MUCH TO CARE WHEN A COMMUNITY IS CAUSING PROBLEMS

There is not enough time in the day to address all the issues that arise within a management company. High performing owners and executives know how to manage their energy. I know owners that when an issue arises, they look at this sheet that ranks all the communities they manage. They look at which quarter the community falls and all the ancillary revenue opportunities outside of the base management fee before deciding how much to care about the problem that has arisen.

SOMETIMES YOU CAN INCREASE PROFITABILITY WHEN YOU FIRE A CLIENT

We suggest companies pay close attention to the low revenue communities in the bottom quarter. If any of these communities becomes a problem for your manager, consider raising your prices on the community. They will either leave and have a low impact on your revenue or they will accept the higher price and increase your profitability.

STAFFING SHORTAGES

If you are bringing on new communities and do not have enough managers, you can become more profitable by dropping some of the lower revenue, lower quarter, communities and replacing them with higher revenue, higher quarter, communities. You can do this instead of hiring another manager and drive up your profitability.

MANAGER PORTFOLIO CREATION

We had one owner that, when he completed this tool, realized he had his most experienced and expensive manager all on the bottom 25% of communities. When he added up the monthly revenue for those communities and compared it to the manager's salary, he realized he was losing money on her portfolio! This led to him to completely reworking his manager's portfolios to drive up the profitability of his company.

BRINGING ON NEW COMMUNITIES

Whenever you are bringing on new communities, you want to make sure it is always raising the bar of revenue and profitability of your entire portfolio. This tool can be useful to place a prospect in and see what impact it will have on your overall revenue.

Continue to remember that not all communities are created equal. You must assess each community's revenue and drain on your company to see its overall impact on your profitability.

Wouldn't it be nice to manage less communities and have the same or higher profit?



Adam Balkcom is the lead facilitator for CAM Leadership Institute.



CACM EXCEEDS DONATION GOAL IN FIRST ANNUAL BACKPACK DRIVE

More than 50 individual members and companies donated in support of The Priority Center.

The California Association of Community Managers (CACM) completed its first Backpack Drive on July 30, collecting donations to fill more than 250 backpacks with school supplies for The Priority Center.

The drive began as part of the CACM 'Give Back Initiative.' The Priority Center is a nonprofit organization, based out of Santa Ana, California, that works to deliver life-changing programs to assist people in crisis. Their mission states that they work to "give them the tools and support necessary to end the generational cycle of trauma, including prevention of child abuse and neglect, through early intervention and mental health services and advocacy."

The backpack drive began in June with a goal of 50 backpacks filled with supplies tailored to different grades. At the end of the drive, CACM collected six times more than the original goal. Along with this total, CACM received extra donations such as gift cards, extra backpacks, and other supplies.

When asked about the drive, Executive Director and CEO of The Priority Center Lisa Fujimoto said, "With 93% of our families

being low income, the cost of school supplies can significantly impact parents and guardians in Orange County. Inflation has further strained families, with parents expected to spend \$586 per child on back-to-school items, according to a Deloitte survey. To help alleviate this burden, The Priority Center collaborates with local corporations like CACM to fulfill school supply lists and backpacks. These items are not just school supplies; they reflect each child's personality and boost their confidence as they start the school year."

For CACM members, participating in this drive is extremely rewarding, especially for members like Michelle Mata, CCAM. "It's awesome to see communities supporting our future generation. Helping each other helps spread blessings, happiness, encouragement, and good vibes around so that more people help, and the cycle continues," said Mata. "Personally, I came from nothing, not even a backpack to call my own. So being able to be a part of giving back to kids who are in need and to be able to make a difference in their lives fills my heart with so much joy."





CACM's Southern California regional director Alia Saouli said this outcome would not have been possible without the help of CACM members, friends, family, and even anonymous donors. These donors include but are not limited to:

INDIVIDUALS AND ASSOCIATED ORGANIZATIONS

Darren Shaw & Team
San Diego Country Estates Association

Shawn Hill & Team
Storm Water Innovative Solutions

Nasreen Ibrahim & Team
Antis Roofing & Waterproofing

Dawn Suskin & Team
Seabreeze Management Company

Nescel Ilagan & Team
The Management Trust
- Southern California, APMC

Stephanie Romero & Team
Aeroscopic Environmental Inc.

Lorena Sterling and Nancy Bothe
Community Association
Financial Services (CAFS)

Ashley Herrera & Team
Powerstone Property
Management, APMC

**Michelle Mata, Kaylynn Hudson,
& Team**
The Management Trust
- California Desert, APMC

Christy Babbitt and Team
Harvest Landscape
Enterprises, Inc.

Victoria DeFreitas & Team
Moonstone Management
& Consulting

**Grace Real, Valeria Hernandez,
& Team**
Villa Park Landscape, Inc.

Bonnie Basham and Team
Basham Management

**Jennifer Turriciano,
Jen Sanders,
& Team**
The Vintage Group

Francine Shute & Team
Powerstone Property
Management, APMC

Desiree Ponce & Team
Precision Landscape Solutions

Lana McGowan & Team
Associa N.N. Jaeschke

**Danisha Little, Paula Tapia,
Sheena McGill, & Team**
Equity Management- an Associa
Company

Perla Bustamante and Team
Coronado Shores COA/EI Encanto
Tower

Claire Cabrey & Team
HWC Management

Bobbie Happ & Team
Desert Resort Management
- an Associa Company

Laura Hurtado & Team
Synergy Management Group

Deanna Console & Team
Gothic Landscape

Summer Blaser & Team
Nextier Insurance Services, Inc.

Clair Christiansen
Facility Masters

Debbie Dailey & Team
Castle Breckenridge Management

Karen Thompson, Kyle Wolack, & Team
Keystone Pacific Management

Dawn Ivey, Julie Russo, & Team
Professional Community Management
- an Associa Company

Guillermo Amador & Team
Customized Guard Services & Systems

Roger Miller & Team
Independent Building Analysis, Inc.

**Shahla Agha, Margo Crummack,
& Team**
Crummack Huseby Property
Management, Inc.

Amanda Om & Team
PCW Contracting Services

Foxy Hudson & Team
Action Property Management

Tim Bruske & Team
Community Controls

Entire Company Participation
Beaumont Tashjian

Entire Company Participation
Hammer Real Estate

Entire Company Participation
Management De NOVO Inc.

Entire Company Participation
Menas Realty Company, APMC:
Orange County and San Diego

Arian Manalo

CACM works with multiple charitable organizations in both Northern and Southern California to give back to local communities through its regional committees. To learn more or get involved head to CACM.ORG.

Meaningful connections lead to personal and career success for those willing to ask for help and those willing to provide it.

The Mentorship Effect

By Lynette Bertrand

Can you name a mentor? Can you name someone you've mentored?

Mentorship involves the influence, guidance or direction by a mentor – someone who teaches, gives help or advice to a less experienced or knowledgeable person at a company or another setting with the goal of nurturing professional development. It's not necessarily about age, but about experience in a particular space or area.

Mentorship in our industry can be particularly helpful if you're moving into a new role, like a community association manager who wants to transition to the industry partner side, said Kelly Zibell, CCAM, senior vice president of community management at Communitas.

"Find an industry partner who is doing it well and ask them questions. What makes them successful in that role and understand whether that's a good fit or not," she said.

Zibell, a seasoned veteran in the CID industry who has held executive roles in prominent multinational HOA corporations, said that having a formal mentor relationship was beneficial to her as she grew as a leader and managed people.

"Usually, it was someone formally designated to me through a program where you get assigned a mentor. But anyone can find a mentor. From a leadership perspective,

reach out to someone who is a good leader at your company or another company and ask them to mentor you," Zibell said.

A mentorship relationship will address areas like:

- Career development
- Networking
- Leadership development
- Adjusting to a new position
- Work-life balance
- Managing interpersonal relationships at work
- Navigating organizational structure and operations

If you are looking to make a lateral change, like from portfolio manager to onsite, it's helpful to have a mentor who has either made that transition, or currently works as an onsite manager. If you're a community manager that's becoming a manager of other community managers or a senior manager, search out a trusted leader in that role who you can approach about your questions or concerns and share tips of what made them successful in that role.

Mentors don't necessarily need to be employed at your company. You can scout and find suitable mentors through attendance at industry events or conferences.

"By joining CACM I was exposed to so many mentors," said Jeff Farnsworth, CAMEX,

CCAM-PM.ND, president and CEO of Steward Property Services, Inc. "People I respected, firms I respected, I would soak in whatever I could from them. I could not wait for the Law Seminar to watch these other firms and see how their staff got along."

For Farnsworth, who took over the business from his mother-in-law after working for the company, she was a mentor, especially in how to lead. She had gained the respect of many leaders in the industry, who would share ideas with him openly.

"Business owners, managers, administrators, attorneys, vendors, I learned so many things about our industry and how to lead through the conversations that industry events provided," Farnsworth added.

Mentorship: A Two-Way Street

A mentorship requires active participation from both the mentor and the mentee. The mentee needs to be proactive about setting up meetings and addressing topics or areas that they want insight on or to discuss. A mentor needs to make themselves available and be open and honest about their experiences. Both need to voluntarily opt in and be committed to the mentorship and trusting of one another.

Both the mentor and mentee have something to gain from this mutual exchange of ideas and experience. For the mentor



"Find an industry partner who is doing it well and ask them questions. What makes them successful in that role and understand whether that's a good fit or not."

Kelly Zibell, CCAM, senior vice president of community management at Communitas.



"By joining CACM I was exposed to so many mentors. People I respected, firms I respected, I would soak in whatever I could from them. I could not wait for the Law Seminar to watch these other firms and see how their staff got along."

Jeff Farnsworth, CAMEX, CCAM-PM, ND, president and CEO of Steward Property Services,

it can be personally gratifying to help someone grow in their role and make a difference in their life. It can also be a way to sharpen their own communication and leadership skills beyond taking a class.

"Becoming a leader 10 years ago and looking out at the people in the industry I have worked with and seeing where they are and how successful they are, if I had a tiny part in that, it's cool to think about the people you touch and impact you've had," Zibell said.

"You never know. You can help keep someone in this career who's thinking about leaving because they're stressed out and don't know how to deal with a board member or a challenging situation and they are overwhelmed. But you made yourself available and helped keep them here."

Farnsworth, who held several jobs before landing in the HOA industry, said he relied on the mentorship of service providers as he learned about community management.

"My mother-in-law encouraged me to walk the property with every vendor they had. You can learn about the property, but also about the components that make up many of our communities," he said. "I would listen to the tree guys talk about trees, the electricians and plumbers talk about infrastructure, concrete and asphalt vendors, pool vendors, landscapers – they all had so

much to offer. Real-world experience and being able to put all of the pieces together was only possible because the vendors I spoke with were willing to share."

How to Start a Program

One of the easiest ways to start an informal mentoring program is with new hires by partnering them up with a longer tenured employee for a certain period of time.

Some companies match the oldest person with the youngest person based on birthdays. This usually partners people up with someone they wouldn't usually gravitate to but helps establish a connection. And both will have such different experiences and views that each will learn from each other. Then have these mentors and mentees share one or two things they've learned from each other at an upcoming staff meeting.

"This is an easy way to get people going in building a relationship versus building a fancy program," Zibell said. "It's what smaller to midsize companies are doing to encourage relationships and to give them connections within the company."

**DO YOU HAVE A MENTOR?
OR DO YOU MENTOR SOMEONE?**

Drop us a comment at communications@cacm.org and we may include it in a future issue!

75%
executives who say
mentoring was critical
to their career

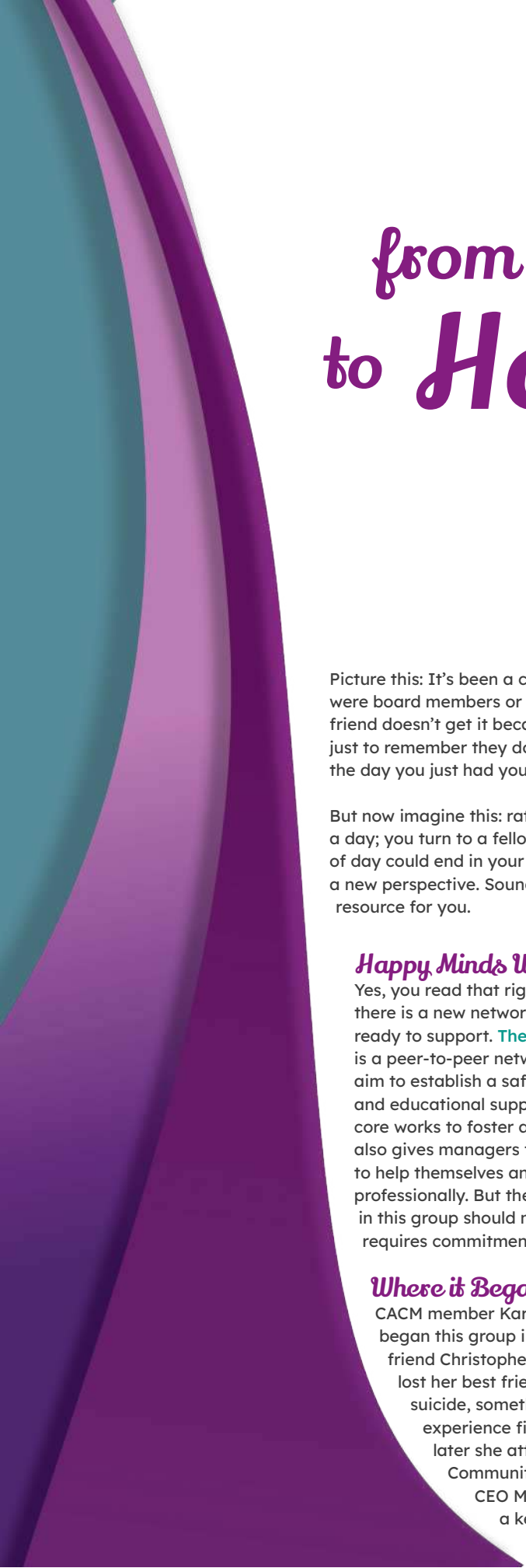
Source: American Society for Training and Development survey

90%
of employees who have
a career MENTOR are
happy at work

Source: CNBC/SurveyMonkey Workplace Happiness Survey



Lynette Bertrand,
Director of Marketing &
Communications at CACM



from Grief to Happy Minds

By Celeste Huecias, Communications Manager

Picture this: It's been a crazy day at work, you've had to deal with several difficult people. Maybe they were board members or homeowners, no matter who, all you want to do is tell a friend. Except, your friend doesn't get it because they don't work in this industry. Or maybe you want to tell your partner, just to remember they don't get it either. And as much as you would like to tell someone, anyone, about the day you just had you know it won't change what happened that day.

But now imagine this: rather than feeling alone in the thoughts you may have from your whirlwind of a day; you turn to a fellow manager you met through Happy Minds Network. So now, your whirlwind of day could end in your colleague sharing a piece of advice or a similar anecdote that will show you a new perspective. Sounds like a dream, right? Wrong, because Happy Minds Network can be just that resource for you.

Happy Minds Who?

Yes, you read that right, this is not a dream and there is a new networking group out there and ready to support. **The Happy Minds Network** is a peer-to-peer network of managers that aim to establish a safe space for social, mental and educational support. This group at its core works to foster a sense of belonging but also gives managers the tools and resources to help themselves and perform at their best professionally. But the role each manager carries in this group should not be taken lightly and requires commitment to the group.

Where it Began

CACM member Karen Kokowicz, CCAM, began this group in memory of her late friend Christopher. In June of 2021, Karen lost her best friend Christopher Pettis to suicide, something no one should have to experience firsthand. But a few months later she attended an ACAM (Alliance of Community Association Managers)-CEO Mindshare Retreat where a keynote speaker began to

spark change within her. The motivational speaker and author Ben Nemtin, spoke about depression and his story began to affect Karen.

"I remember I just couldn't stop crying when he was speaking because of Christopher."

After this conference, Karen truly began her grieving process. By purchasing Nemtin's book, *The Bucket List Journal*, and continuing her journey through grief, Karen knew she wanted to do something, "I felt inspired to do something in honor of Christopher."

Thus began the creation of the Happy Minds Network. Karen began consulting with friends and fellow professionals and brainstorming this idea of a safe space for managers. She recognized that this industry talks a lot about owners and board members, but it is rare to see the conversation about managers and the much-needed support they should receive. After brainstorming, Karen made it a mission to get the group up and running.

"I want to try and bring what Christopher and I had to a group of managers," Karen said.

Small roadblocks along the way

Of course, with every dream and idea, there is reality. Karen quickly began to realize she needed to shape what this group would look like and how it could really work. How do you create it? How do you categorize it? Throughout this process, Karen struggled to ask for help, but she kept seeing a reminder of Christopher everywhere in the form of a hummingbird (hence the Happy Minds Network logo) and she knew it was a sign from him to keep pursuing this group.

Karen began meeting with close friends who are familiar with nonprofit work, and with the help of the group's founding members, the mission and idea began to form.

"We came together from tragedy, but we didn't want the group to be focused on suicide prevention. We want to direct them to help, if necessary, but we really want to try to help people figure out how to do this job and how to do it well while taking care of yourself and not feel alone."

By not putting themselves as mental health experts, they can pose questions such as: what our resources are, what are some tips and tricks and how can we bring in experts. Now, they hope to accomplish a group meeting where they can have round table discussions and begin BETA testing with what works and what doesn't for the benefit of the group and their meetings.

What lies ahead?

With a better idea of who the group is and what they want to accomplish, Karen is excited about what is to come and how it can become more than just a network and resource. Instead, it can act as a supportive community, that works to give practical tips for your personal benefit with things such as positive affirmations to build yourself up, learning how to perceive negative thoughts and more.

The Happy Minds Network may be fairly new but there is still much to look forward to. With one mixer under their belt in Los Angeles, that drew 25 attendees, there are future meetings and mixers in the works next. The first official meeting will be held November 1st in Los Angeles and their next fundraising mixer is set for January 17, 2025. The journey for Karen and the Happy Minds Network is just beginning and she is just happy to see people interested in the group and what it is about.

Karen states that this group and how it started is near and dear to her heart and getting the opportunity to speak about it to more people in the industry is rewarding in itself.

Now with almost 30 years of experience in this industry, Karen has grown from a property manager, director of operations, onsite manager, owner of her own company to now the founder of Happy Minds Network and all she can hope is that people will gravitate to the group.

"It makes me cry when I do talk about it," she explained. "When I started this journey, I was speaking with my therapist and said if I can just help one person, that will be worth it."



THE PEOPLE BEHIND HAPPY MINDS NETWORK:



Karen Kokowicz, CCAM
Coro Community
Management & Consulting
Founder and Board Member



Ramona Acosta
Tinnelly Law Group
Board Member



**Bruce Ratliff, CAMEx,
CCAM- Emeritus.HR.CI**
HOA Culture Consulting
Board Member



Celeste Huecias is Communications
Manager at ACAM, which she joined
in May 2024.

INVESTING IN EXCELLENCE

By Andrew Hay, CAMEx, CCAM-ND.PM

As a company executive, one of my foremost responsibilities is to ensure that our organization operates at the highest levels of efficiency and professionalism. HOA management requires a unique blend of technical knowledge, interpersonal skills, and understanding of state and local regulations. To maintain our competitive edge and uphold our reputation as industry experts, I have found that investing in a combination of certifications through the California Association of Community Managers (CACM) and robust internal training is not just beneficial but essential.

CERTIFICATIONS AND TRAININGS

The primary benefit of a CACM certification is an enhancement in the professionalism and competence of our employees. We invest in our employees by paying for the training and educational programs offered by CACM to ensure that our community managers are equipped with the latest industry knowledge and best practices. This not only improves their individual performance but also elevates and standardizes the overall efforts within our company.

However, certification is just one piece of the puzzle. We complement CACM certification with comprehensive internal training programs. These programs include formal class settings where employees can deepen their understanding of concepts and practical skills. Additionally, on-the-job training allows

employees to apply what they have learned in real-world scenarios, further solidifying their knowledge and expertise. This holistic approach ensures that our community managers are not only certified but also experienced and well-rounded professionals.

IMPACTFUL INVESTMENT

Investing in the professional development of our employees through CACM certification and internal training also has a positive impact on their job satisfaction and retention. Employees who feel supported and valued by their employers are more likely to stay with the company long-term. Certification provides them with a clear career path and the skills necessary to advance within the organization, while internal training offers continuous growth and development opportunities.

By offering a blend of commitment to CACM certification and designations and internal training, we demonstrate our commitment to our employees' personal and professional success. This not only boosts morale but also fosters culture of loyalty and dedication. In an industry where turnover is high, retaining skilled and experienced employees is a significant advantage. The combined approach ensures that our employees are always learning, growing, and feeling appreciated.

Additionally, many clients place a high value on the credentials and expertise of the professionals managing their communities. When our employees are CACM certified and have undergone extensive internal training, it instills confidence and trust in our clients.

Employees who feel supported and valued by their employers are more likely to stay with the company long-term.

They can be assured that their managers are knowledgeable, reliable, and committed to their chosen profession. Ever striving to become experts in the industry. This trust is critical in building and maintaining strong client relationships.

Satisfied clients are more likely to remain under contract, refer our services to others, and provide positive testimonials, all of which contribute to the growth and success of our company. The combination of certification and internal training ensures that our employees are not only technically proficient but also adept at delivering exceptional customer service.

A LEGAL STANDPOINT

The community management industry has a lot of nuances, with a myriad of laws and guidelines that must be followed. Non-compliance can result in penalties to our clients and damage to our company's reputation. CACM certification programs emphasize the importance of compliance with the Davis-Stirling Act and through the classroom and networking opportunities provides comprehensive education on current laws and regulations.

Certified managers are better equipped to identify the complexities of legal requirements, reducing the risk of non-compliance and potential liabilities by timely bringing in legal experts. Internal training further reinforces this knowledge by providing specific, up-to-date information on the latest regulatory changes and best practices. This proactive approach to risk management protects our company and our clients, ensuring that we operate within the bounds of the law and uphold the highest ethical standards.

COMMUNITY - THE MOST IMPORTANT INVESTMENT

Most people who serve the community association management industry love to talk and to share their experiences. CACM's education and networking opportunities provide our employees with the ability to connect with other professionals in the industry. Networking with peers, attending conferences, and participating in CACM events allows them to share knowledge, exchange ideas, and collaborate on best practices.

This network of professional relationships is invaluable, providing support, insights, and potential partnerships that can benefit our company.

Internal training programs also create opportunities for employees to build strong relationships within our organization. Team-building exercises, shared experiences, collaborative projects, and mentorship programs foster a sense of community and belonging. This internal network enhances our employees' sense of community and belonging within the industry, reinforcing their commitment to their profession and their role within our company, contributing to their overall job satisfaction and career growth.

The benefits of CACM certification and comprehensive internal training for our employees are manifold and far-reaching. From enhancing professionalism and competence to improving client trust and satisfaction, certification through the California Association of Community Managers and robust internal training are strategic investments that yield significant returns for our company.

They empower our employees, strengthen our competitive position, and ensure that we operate with the highest standards of excellence and integrity. By prioritizing both CACM certification and internal training, we are not only building a more capable and dedicated team but also elevating our employees and providing the highest potential for long-term success and growth in the community management industry.



Andrew Hay, CAMEX, CCAM-ND.PM, is a CACM board of directors member and has ascended the ranks to serve as CEO of The Helsing Group, Inc.

By Hamlet Vazquez, MCAM-HR, MBA

Mastering the MCAM Exam

“Success is no accident.

*It is hard work, perseverance, learning, studying, sacrifice
and most of all, love of what you are doing or learning to do.”*

— Pelé

Unless you are Mike Ross from Suits and have a photographic memory, there is no way around it – you must spend a significant amount of time studying for the MCAM exam! The exam, made up of 100 multiple choice questions, will test whether you have indeed mastered community association management or not. It is a pivotal part of earning the MCAM (Master of Community Association Management) designation, and there are no shortcuts in preparing for it! So, how do you master it?

First, you need to review every single CACM course you have taken! Specifically....

HUMAN RESOURCE MANAGEMENT

This is one of the most important domains of knowledge that you must master to be a successful association manager. In preparing to take the exam, make sure you are well versed in recruitment and performance management to conflict management to human resource laws. Some of the questions will provide scenarios for you to then choose the best course of action while other questions will test your ability to recall specific HR laws.

RISK MANAGEMENT

Another important domain of knowledge, risk management tests your understanding of the risks faced by associations and how to best manage those risks. Once again you will encounter various scenarios that will test your understanding of risk, as well as questions that will test your

ability to recall various concepts discussed in the risk management courses.

ETHICS

Roughly 10 percent of the test will focus on ethics and the material in the ethics courses. Out of all the domains of knowledge, your best approach in preparing for this topic is to memorize the various concepts discussed in the ethics courses. You will be tested in recalling those concepts, so some flash cards will come in handy for this topic!

FINANCIAL OPERATIONS

For obvious reasons, this is one of the largest domains of knowledge that is tested in the exam. Thankfully, if you've been a manager for at least the five years required to pursue the MCAM, a lot of this should be almost second nature. Still, you need to review the material

from all the financial classes you've taken, especially the Strategic Financial Planning course.

CA LAW

Along with the Financial Operations domain of knowledge, this is the largest domain of knowledge that you will be tested on during the exam. Over a quarter of the test will cover California Law! You will need to understand everything from the creation of CIDs to disclosures to legal remedies to everything in between! There is no way around this other than to spend the large amount of time it will take to review all the material covered by the various legal courses you have taken over the years. Thankfully, this is always a good refresher for even the most seasoned of managers.

POLICY GOVERNANCE

Lastly, policy governance must be mastered in order to master the MCAM exam. Personally, this was the most difficult domain of knowledge for me given that the concepts are more technical and specialized. Suffice it to say that as with the ethics domain of knowledge you need to memorize the concepts and terms referenced in the material.

The second step to mastering the MCAM exam may sound obvious but...

This step is so important as it is assumed but not always implemented. The second step is to carefully read the questions. I am not trying to belittle anyone by saying this, but it is only human nature to be rushed when taking a timed exam and in that rushed state you end up not carefully reading the question and therefore getting it wrong. Take the advice of Mortimer Adler in 'How to Read a Book',

“Great speed in reading is a dubious achievement; it is of value only if what you have to read is not worth reading.”

The third and final step to mastering the MCAM exam...

After you have reviewed every single CACM course you have taken, re-review every single CACM course you have taken, and then do it

again. For this test, do not think that you can simply rely on your experience since the test will test whether you recall and understand the course material you have gone through. There are no shortcuts!

So, is all this time and effort worth it just to pass the MCAM exam and get one step closer to securing the MCAM designation? Only you can answer that question. It depends on what the MCAM designation signifies to you. It depends on whether you are hoping to find a better job. It depends on whether you enjoy the challenge and the achievement. For me it was certainly worth it as it demonstrates a high level of competence in the association management field, and I enjoyed the challenge.

If you are working towards your MCAM, feel free to reach out to me for more tips and, more importantly, for encouragement to press on!



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



EDUCATION BY FIRE

*Challenging the
Conventional
Education System*

DOES A DEGREE MAKE A BETTER MANAGER? IF SO, WHICH DEGREE?

For those of us who have had to wade through hundreds of applications to find the right potential community managers to interview, many of us filter out those who do not hold a four-year degree from a university. We assume that if this bar is met, the candidate will have superior written and verbal communication skills, an understanding of business practices and a strong base in practical mathematics. However, we find that this is not always the case.

One of the most important skills a manager can have is their ability to communicate effectively with all different types of vendors, clients, and staff and be the filter to distill complex information. Another cornerstone of a strong manager is a healthy work ethic and personal accountability. If there is anyone with a doctorate in “Personal Accountability” I would love to meet them.

WHAT IS THE EDUCATION BASE LEVEL FOR A COMMUNITY MANAGER?

It is this author's opinion that a high school graduate has the same tools for success in the CID management industry as someone with a master's degree.

As mentioned earlier, those without a college degree are often overlooked for those who have run the societal gauntlet of the university system. Students are promised a well-rounded world view and marketable skills but sometimes just find themselves with a mountain of debt and a few extra #2 pencils after graduation. It is my belief that this industry is uniquely positioned to give opportunities to those who did not take the traditional educational path, but still have a drive to learn and succeed.

By Justin Sacoolas, CCAM

T

People who have worked in construction, hospitality, insurance, and an array of client-facing roles have the skillset to learn and excel in this field. Competence, integrity, ethics, compassion and follow-through are a few attributes that make for excellent managers and are not taught by a professor.

WHAT FORM OF EDUCATION IS MOST IMPORTANT?

“Education by fire” – the act of deliberately learning on the job during real world scenarios.

Despite where anyone started, where they are now or what industry they are in, there is no substitute for education by fire. This is the act that turns an apprentice into a master. This sentiment is true in art, music, and all manner of craftsmanship. A violinist who endlessly practices to get just the right stroke of their bow over the strings to evoke emotion. The chef meticulously calculates their spices, temperatures and cook times. The painter who sees light and dark differently than the rest of us because they have spent so much time immersed in the nuance of shadows.

BEING A COMMUNITY MANAGER IS NO DIFFERENT THAN ANY OF THESE TRADES OR CREATIVE FIELDS.

We all have the ability to be a student of industry and life in general if we care to take the time. Each new challenge is an opportunity to become an expert, and community management interfaces with so many different fields and real-world challenges: insurance, legal, plumbing, construction, finance and customer service, just to name a few. To further explain, picture the two following examples that will not come up in a classroom.

EXAMPLE SCENARIO #1:

A pipe bursts in a condominium

When a condominium is flooded by a broken water line, there are two paths a manager can take. Either do whatever it takes to get it off your desk or dive into the process and learn everything about it. Education by fire is all dependent on how far the individual is willing to go beyond what it takes to “get a passing grade.”

The first step is asking questions and speaking to the experts surrounding the event. Why did the pipe burst? Is this a systemic issue that will repeat somewhere else on property? What is done during a unit dry out? How do you know when a unit is safe for the occupant? What do the CC&Rs say about this situation? How are the people in the unit doing? Do they understand the timeline for repair?

Something as mundane as a pipe bursting can either be treated like a task to get off your desk or an opportunity to become an expert in everything from how copper pipes age, to how insurance adjusters do their job. Truly caring about managing an event properly will not only heighten the quality of life for those who live in your communities, but will make the manager a more well-rounded and knowledgeable human.

EXAMPLE SCENARIO #2:

A phone call comes in from an irate customer who does not approve of their new assessment bill.

Chances are, we have all had this phone call. There are many times in our professional and social lives where people are accusatory, aggressive, condescending and just flat out rude to us. We’ve also all known a colleague who refuses to have difficult conversations or speak to people who are upset, ultimately sending them to, “the pit of unanswered voicemails.”

These kinds of situations offer the wise and motivated student an opportunity to create an ally out of an aggressor while also educating themselves on the factors at play. This is an opportunity to know each line item of the budget and research and understand why the costs have increased. A simple call such as this can spur research into what policies the State has enacted that contribute to rate hikes on utilities, a better understanding of the California insurance market and what options are available as well as an understanding of challenges vendors face with rising costs in both materials and labor.

For those who are willing to go the extra mile, a heated phone call can transform into a Master Class in economics. Additionally, and perhaps more importantly, it creates an opportunity to learn better communication and conflict resolution skills. After years of taking hard phone calls, trying different de-escalation techniques, and evolving ourselves to be better, the personal and professional growth that sprouts from such courageous calls is palpable.



Justin Sacoolas, CCAM, is the Monterey Regional Manager for Compass Management Group, Inc.



By Anne Lackey

The Mayoral Touch in Community Management: Investing in People

It's an election year, and there are no yard signs with your name on them, but as a community association manager, do you ever feel like you've been elected to a pressure-packed political position?

You must navigate complex interpersonal conflicts between residents and balance the often-competing interests of homeowners and the board of directors. You also manage a

community's financial health by developing and adhering to a strict budget, overseeing maintenance and improvement projects, and making tough decisions that will sometimes draw collective groans.

That's why community managers are America's de facto mayors. You oversee the day-to-day operations of large HOAs, which can feel like running a small city.

“Community managers are America’s de facto mayors. You oversee the day-to-day operations of large HOAs, which can feel like running a small city.”

As any good mayor knows, you can't do it alone. Your onsite staff are your eyes, ears, and hands on the ground, ensuring everything runs smoothly.

A CAM contact list dwarfs the “Rolodex” of most jobs. You deal with groundskeepers, janitorial staff, repair technicians, assistant managers, office administrators, bookkeepers, lifeguards, fitness center attendants, event coordinators, guards, patrol officers, gate attendants, landscapers, pool maintenance companies, HVAC contractors, plumbers, electricians, and more. Phew! That’s a lot.

Think of all these people as part of your “mayoral administration,” and failures by any of them reflect how your administration is perceived. That’s some real pressure. But it can be managed. The key is learning how to develop reliable relationships in every direction.

Building reliable relationships takes time, understanding, and a little bit of practice. It cannot be mastered in one go but instead requires you to stay inquisitive.

To provide you with some helpful tips on reliable relationship building, it’s best to imagine these relationships like bank accounts. Every positive interaction, every moment of recognition or support, is like making a deposit. You need to make sure you’re making regular deposits before making withdrawals, just like a real bank account.

Here are some healthy deposits to make:

The Contemplation Deposit

The first deposit happens alone. It involves contemplating what a day in the life is like for that gate attendant or HVAC contractor. You have too much to do to know everyone’s backstory, right? Of course, you do. But set a few minutes aside every day to think about your interactions. It’s helpful to imagine your interaction from the flip side. What was that person thinking? What do they want in life? What motivates them? What would be an unexpected, nice surprise for that person if they knock it out of the park for you?

The Inquiry Deposit

When you’re in the habit of contemplating what’s happening in the lives of those in your orbit, it’s easy to enter inquiry mode. Ask how they’re doing. They’re inevitably stressed about something. A maintenance technician may struggle to keep up with a surge in work orders. A lifeguard may be dealing with unruly pool-goers. This is helpful intelligence. A surge in work orders will be a problem for others besides the maintenance staff. Unruly pool-goers are an issue for more than the lifeguard. Make sure to tell each staff member that you appreciate them sharing with you. Express empathy for how that is making them feel. That’s the minimum deposit. Perhaps you can then seek their opinion on a solution. Document their work troubles and add them to your contemplation time. If the resolution means more work and stress on the person who told you about the issue, you need to factor in an additional recognition deposit.

The Recognition Deposit

The name of the game in community management is problem-solving. So, each resolved issue is a win. Keep track of the victories, no matter how small, and acknowledge who made the difference. People want the world to see that they matter. The more detailed we can be in noticing, the more impact we have relationally. Did a groundskeeper go above and beyond to beautify a common area? Did an administrative assistant handle a difficult resident interaction with grace? Let them know you noticed and appreciate their effort. A sincere “thank you” or a

written note of praise can go a long way and costs nothing. Also, look for ways to deliver tangible gifts after a job well done. Surprise pizza from a quality place is a real pick-me-up for lifeguard staff on a long summer day.

The Development Deposit

Jobs are long-haul trips. We’re on a daily path but also moving across life’s terrain. And we want to believe we’re going somewhere, not sitting still. So, contemplate ways to help staff develop skills and grow as people. This could include specialized training courses, mentorship from senior staff, and personalized development plans for maintenance technicians. Administrative staff with leadership potential could be provided with opportunities to attend workshops, lead small projects, receive coaching and feedback, and create a roadmap for advancement within the organization. When you make these deposits in individuals, they know you’re there for them, and they’re ready to make deposits back to you.

You’re not a mayor, but you carry a mayor’s weight. That means you need help. And the best way to get that help is to make regular relational deposits. Good people want to offer value when they feel they’ve been valued.

No, your name won’t be on yard signs. Thank goodness, right? But if you’re diligent about making healthy relational deposits, you’ve made a huge investment in being a great leader.



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





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CIP100

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

Session 4 of 5
October 29
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Session 2 of 5
October 15
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November 5
8:00 AM - 10:00 AM

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October 22
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SPC 460

Session 1 of 2
October 17
1:00 PM - 3:30 PM

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FOUNDATIONAL ETHICS

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CMM 130

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9:00 AM - 11:00 AM

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RISK MANAGEMENT (6 CEUS)

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9:00 AM - 12:00 PM

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9:00 AM - 11:00 AM 9:00 AM - 11:00 AM

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