

# *Channels of* **Communication**

*Serving Ventura, Santa Barbara, San Luis Obispo and Kern Counties*

**FIRST QUARTER 2017**

The Official Publication of  
CHANNEL ISLANDS CHAPTER  
**community**  
ASSOCIATIONS INSTITUTE

## **Aging Communities**

**Planning for the Future of  
Your Community Association**

### **IN THIS ISSUE...**

**Aging in Place - The  
Building's Perspective**

**Deferred Maintenance vs  
Insurance Coverage**

**Ask the Expert**



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# Channels of Communication

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Page 6



Page 8

## Your Chapter

- 5 President's Message
- 21 CLAC Corner
- 23 New and Renewing Members
- 24 Chapter Sponsors

## Chapter Happenings

- 14 Casino Night & Chapter Awards Dinner
- 17 Chapter Luncheon Event Recap: Ready or Not... HEAR It Comes Cyber Theft & Community Associations
- 22 Calendar of Events
- 22 Chapter Member Announcement
- 22 Thank You and Congratulations
- 23 Welcome Members

## Special Features

- 6 Aging In Place - The Building's Perspective
- 8 Deferred Maintenance vs Insurance Coverage
- 12 Ask the Expert

## Resources

- 27 Advertising with the Chapter
- 29 Classified Directory/Advertisers



Page 12



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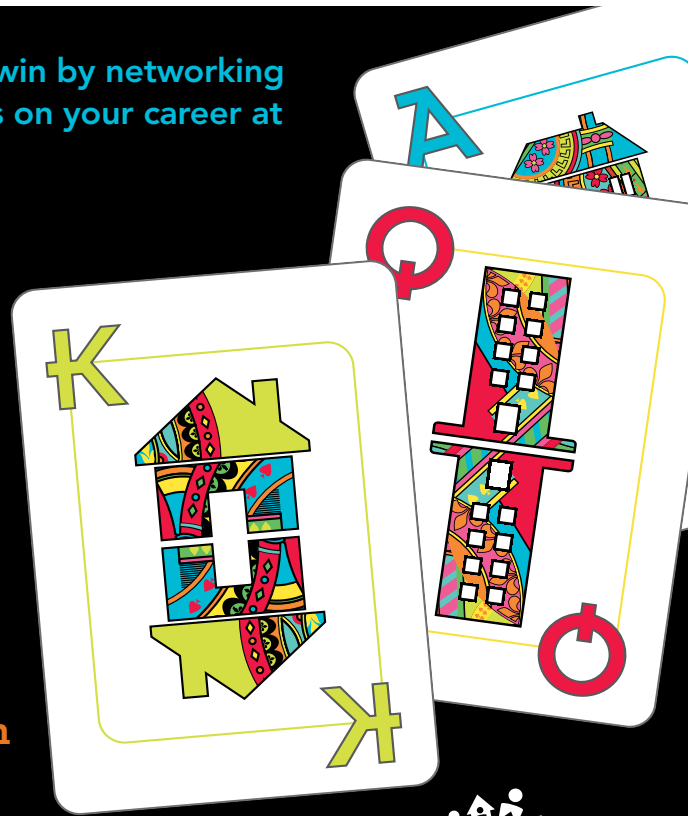
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# president's message



Dear Members:

It is an honor to serve as the Channel Islands Chapter President in 2017. When you stop and consider that I have been a member of our chapter since the early 90s, I am now one of the "old guard." It has been exciting to watch the chapter morph from 140 members when I joined, to currently, an astounding 650 members. I have worked with four different executive directors and countless board members and volunteers in my tenure. I am now serving my second term as President of the chapter. Some years, I have been in the trenches, battling through tough times, and other years I have been fortunate to ride on the chapter's coat tails.

Why do I have such appreciation for and loyalty to our chapter?

Simply put, it is the quality of our members. Since I attended my first event, I have always felt welcomed and appreciated. Our chapter's culture is warm and inviting, and I see many of its members more as friends than business associates. I am continually impressed by the chapter's welcoming vibe when new members attend its events. When I leave our events, I feel they were well worth my time and I appreciate the genuine connections I made with people that I've know for decades, as well as people I've met for the first time. It's fun for me, and I appreciate everything our volunteers, board members, and Executive Director, Leah Ross do to keep the ship moving steadily forward.

The chapter has maintained several continuous years of success and this year, the Chapter board's goal is to ensure we continue to improve the value we provide to our members, while we work to maintain our chapter's warm and inviting culture. We are challenging ourselves to try new things with our events and we are committed to continually question our perception of what works.

The chapter will continue to educate our members on the value of CAI's designations and promote the development of our members' CAI credentials. Our program designed to encourage and assist managers with their CMCA, AMS and PCAM certifications will be expanded. We will continue to offer programs to our board member, homeowner and manager members at low or no cost. And we will work with our business partners to ensure they better understand how to participate in the chapter for the benefit of building relationships with our membership.

I have encouraged our chapter board members to interact with the chapters' members at events, and to "mine for information." We want your feedback and we value it! Please be sure to let our board members know what is working well and what we can improve on. I will continue to work with the board to evaluate our strategic objectives to ensure we continue to grow at a healthy, organic pace; and that we continue to maintain the value our programs and events bring to you, our members.

It is an honor to serve as your 2017 Chapter President. I look forward to seeing you at the chapter's events.

*Gordon Miller*

Gordon Miller  
CAI-Channel Islands Chapter President

# Aging in Place

*The Building's Perspective*



*By Gary Porter, RS, FMP, CPA  
Facilities Advisors International*

**T**he community association industry has addressed the topic of “aging in place,” primarily related to the social and physical needs different from when they originally moved into the community. Little has been written about the very significant impact of the buildings that are also “aging in place.” And that’s where the money angle comes into play.

In my forty years of experience in the community association industry and thirty-five years as a reserve professional I have worked across the country seeing a wide range of different associations, lifestyles, and building types. For practical purposes, this discussion will be limited to condominium and townhome associations where the exterior maintenance is association responsibility.

For most associations, the most important goal of developing a funding plan is to avoid special assessments. The monthly assessment for association operations is assumed to include

an appropriate amount for reserves but the pressure is always on the board of directors to keep assessments as low as possible. If you live in a condo association where assessments have remained the same for years on end, or where board members campaign on a platform to keep assessments low, watch out; these are tried and true recipes for creating special assessments.

There is no specific formula for determining how much money is necessary for reserves. There are general guidelines and many people have been indoctrinated to assume that if you’re 70% funded you have a “strong” reserve fund which virtually eliminates the possibility of a special assessment. While we use percent funded when our clients request it, I believe the concept is a clumsy simplification that can be dangerous. People place so much importance on it without even knowing if it is an accurate calculation. I have seen an association only 30% funded that never required a special assessment, and another that was 88% funded that needed



an immediate special assessment. A cash flow analysis is a much more reliable tool in analyzing a funding plan, percent funded only works if all significant components are included in the reserve study.

What are the major cost components that the association will likely face over time? While there are potentially hundreds of different items, let's look at just the few high-ticket items that most associations will encounter. These are the ones to pay attention to:

- **Roofing** – Depending on roof type and material, costs often range from \$4,000 to \$25,000 per unit, and life generally ranges from 15 to 50 years, with the majority of roofing types not exceeding 30 years.
- **Siding replacement** – Some siding types may never require replacement, and may be considered “lifetime components,” meaning they will last as long as the building structure. There are too many different siding materials to discuss here, and they have significant variations in life and cost. In our experience, wood siding has the worst combination of short life span and high cost to replace. It is also a widely used product because of the aesthetic characteristics of wood siding.
- **Painting** – Depending on the underlying surface, paint quality, climate, and proximity to salt air, the life span of paint can vary significantly. We see most associations adopting painting cycles ranging from 5 to 15 years.
- **Asphalt** – Depending on original construction quality, climate, and traffic conditions, the life of road surfaces can vary significantly. Even with interim maintenance such as slurry seal and overlay, most asphalt surfaces will require a complete replacement approximately every 30 years.
- And, if you're a high rise association, add elevators, HVAC equipment, plumbing equipment, lobby remodels, interior hallways, fire safety equipment, etc., etc., etc.

An impressive (possibly scary) list of large expenses, but what is the most expensive component in a condominium project - Utilities inside the walls, under the slab and underground – water, sewer, gas and electric. Natural gas piping is less likely to fail and most electrical systems are replaced only if the walls are already open for another purpose, but domestic water and wastewater pipes, vent pipes, water mains from the street, irrigation mains and lateral lines, sewer mains to the street; these all fail over time, without question. The key is to get the timing right, of course, this all depends on system design, materials used in construction, and quality of workmanship.

However, unless prepared by our company, I have never seen these components included in any reserve study unless the components had already started to fail. Only once have I ever seen another company even disclose the maintenance obligation, indicating it was not included in the study. If you include these components in a reserve study only once they start to fail, you're about 50 years too late!

Our reserve study company has approximately 1,000 association clients and in that group, only five have actually funded for utilities replacement starting with the date the condominium was placed in service. I have personally worked with twelve associations that have had to either completely or partially replace their in-wall and under slab utilities. Costs have ranged from \$15,000 to \$50,000 per unit, which arrived in the form of a special assessment. All of these projects were 35 to 60 year old associations.

I'm not advocating that every association should be funding for this future cost but we do insist that a disclosure is included in the reserve study report. The association has to know that utilities are not being funded. When is this cost likely to occur? Let's call it the fifty-year mark. I have heard a number of engineers testify in construction defect cases that the above utilities have a life range of 40 to 60 years, so we tend to use 50 years as the average. Therefore, if you're living in a fifty year-old condominium that has not yet replaced these components, it's important that you fully investigate the current condition of your in-wall/subterranean utility lines. The reason this is normally not funded? Cost. On the low end, ignoring inflation, cost works out to \$25 per month for fifty years (\$300 annually for 50 years is \$15,000). It's very difficult to convince anyone to pay \$25 per month for fifty years. Hence, this is virtually always a special assessment issue.

Always remember, you can't reserve for what you can't see... in your report. Your “hidden” components still exist and the replacement cost, if not properly budgeted, can lead to a political and financial disaster in your community. 🏠

**Gary Porter** is a founding member of the CAI-Channel Islands Chapter, served as CAI's national president (1998-99), and is coauthor of “CPA's Guide to Homeowners Associations” and “Reserve Studies – The Complete Guide.” He is also President of the International Capital Budgeting Institute. As both a CPA and FMP (Facilities Management Professional) he has the multidisciplinary training critical to the reserve study process.



# Deferred Maintenance vs Insurance Coverage

By Joe Smigiel, CIRMS

Steve Reich Insurance Agency, Inc.

We all know that there are costs associated with maintaining and repairing the common property throughout your homeowner association. If maintenance is planned for, scheduled and consistent it can prevent unforeseen costs. Many homeowners assume insurance coverage will cover these expenses. Debunking some of these myths will help educate associations and possibly avoid costs they assumed would be covered:



- It is often perceived that water intrusion from a storm is covered under a standard “fire policy”. Coverage for this type of claim is afforded only if the storm causes physical damage to the structure that allows that water to enter and damage a unit. A standard policy DOESN'T cover interior water damage caused by a roof leak from improper or inadequate weatherproofing.
- It also does not cover damage from deferred maintenance or neglect.
- Nor will it cover faulty workmanship. Example of wording from a sample ISO form policy:  
Exclusions: water- 1. Flood, surface water, waves, tides, tidal waves, overflow of any water or their spray all whether wind driven or not. 2. Mudslide or mudflow 3. Water or sewage that backs up or overflows. 4. Water under the ground surface pressing on, or flowing or seeping through: foundations, walls, floors or paved surfaces, doors, windows or other openings.

Maintenance, wear and tear, continuous seepage or leakage of water for over 14 days. The interior of any building or structure caused by or resulting from rain, snow, sleet, ice, sand or dust whether driven by wind or not **Unless:** The building or structure first sustains damage by a covered loss to its roofs or walls.

Insurance will cover:

- Mechanical failures that lead to water damage. For instance, a pipe bursts and causes damage to a unit, your policy will pay for the resulting damage but will not fix the pipe.
- Coverage will be afforded when a covered peril causes damage to a structure and water enters and causes damage.

Although the Association is generally not responsible for damage to the interior of the units during a rainstorm, if the association was found negligent and reasonable maintenance was not performed on the roofs or exterior of the buildings as called for by the CC&R's, they could be held liable for these damages. In this case, the loss could be covered under the liability section of the policy.

Understanding your insurance coverage is a vital step towards avoiding unforeseen expenses. As a general rule, insurance is intended to cover those events that are sudden, accidental and unexpected. The insurance coverage should not be thought of as a maintenance policy. If you are unsure what your policy covers, it is time to contact your agent. Juggling a claim in the midst of an emergency isn't the time to fall victim to classic insurance exclusions. [↑](#)

**Joe Smigiel, CIRMS** is the Vice President of Steve Reich Insurance. He has over 18 years experience as an expert in Association Insurance. He currently serves on the Board of Directors for the Channel Islands Chapter of CAI and is the board liaison for the Chapter's Marketing & Membership Committee.





CAI-CHANNEL ISLANDS  
**CHAPTER LUNCHEON**

**TUESDAY, APRIL 25, 2017, 11:30 AM**  
The Courtyard Marriott, 600 E. Esplanade Drive, Oxnard



**“...Ism” ... A Discussion on Race, Religion, Sex & Age Differences in Our Communities**



**“...Ism” ... A Discussion on Race, Religion, Sex & Age Differences in Our Communities**

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**Sandra L. Gottlieb, Esq. SwedelsonGottlieb**

Sandra L. Gottlieb is one of California's leading community association attorneys and a founding partner of the law firm of SwedelsonGottlieb which specializes in the representation of homeowner associations. Sandra's experience and expertise in representing community associations allows her to provide counsel on the many different matters and issues that impact California homeowner associations. Sandra is a past-president of three chapters of CAI and is a member of CAI's College of Community Association Lawyers (CCAL).

**Lisa A. Tashjian, Esq. Beaumont Gitlin Tashjian**

Lisa A. Tashjian is a partner for the law firm of Beaumont Gitlin Tashjian - a full service community association law firm. Ms. Tashjian has been practicing community association law for most of her legal career focusing on litigation, general counsel work and assessment collections. At Beaumont Gitlin Tashjian she devotes her daily practice to serving the legal need of the firms community association clients.



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**By Ruth Cederstrom, CCAM, PCAM**  
Concord Consulting & Association Services, Inc.



***Recently, our association has more young families moving into the community. Many of our retired folks are acting as if this is a problem and are very disappointed that their community is changing. Any suggestions on how to create a more cohesive environment for all to enjoy?***

With our naturally aging communities this is becoming more common. Where once the membership was young and vital many of the owners have moved on to either one-story homes, in with family members or into care facilities or the inevitable move... death. A recent study by CAI-National, in their publication *Community Next: 2020 And Beyond* states,

“Millennials will have a profound influence on the housing marketing in general and community associations in particular. In roughly 15 years this demographic will be 33 to 49 years old and in need of housing.”

As we have seen this to be true in many of our Associations – now the new owners have children – some even teenagers! More pets! Sports equipment! More cars! Yes, the nature of your community is changing. For many new owners this is the first time they’ve owned a home or lived in a homeowners association and there is some readjustment time. This calls for patience and a little understanding and perhaps a letter or two. Having an opportunity to mingle with the longer-term owners is a great way to begin a bond. One Association we work with has a BBQ or an ice cream social at the pool area that has been very successful and a way to welcome the summer when the pool heater has been turned on at the end of May and to say goodbye to the pool heat at the end of October. With younger families in the community, most likely the pool area will be used more and often we find the longer-term residents enjoy watching the children swimming in the pool ... making happy children noises.


Although not popular when they were first installed in new communities and changed out in older communities, group mailboxes are a great way to meet your neighbor and this is really all about meeting your new neighbors and becoming friendly.

Dog walkers are another good way to break the ice because dog walkers talk to other walkers and their dogs too. It’s all about getting past the uncertainty of something being “new”.

Remember the Welcome Wagon? We work with several communities that have a Welcome Committee and as units close escrow and management receives the new names and contact information for the new owners (Or tenants), they are sent to the committee who may buy a small plant or bring a card and a hearty welcome to the neighborhood.

Another great idea is to highlight one long-time resident and a newer resident in the Association’s newsletter with a photo of the two or more of them together. Highlight interesting things about the neighbor without compromising their personal identities.

Being frightened, disappointed or uncertain of change is not unusual for people being thrown or put into new situations. However with a little planning, the old and the new can become a community in the truest sense. Building effective relationships amongst the different generations can be an opportunity to create innovative approaches to remedy challenges and further advance the overall health and vitality of a community.

To read more about the CAI-National Study, *Community Next: 2020 And Beyond*, visit [www.caionline.org](http://www.caionline.org). 

**Ruth Cederstrom** is owner of Concord Consulting & Association Services Inc., a Camarillo based company. Ruth began her career in 1978 when she volunteered to serve on her condominium Board of Directors. Since then she has been an onsite manager, portfolio manager and now owner of Concord Consulting & Association Services, Inc. Ruth holds the Professional Community Association Manager (PCAM) designation which is the highest professional designation in the industry.



**By Sean D. Allen, Esq.**  
Roseman & Associates, APC

***I live in a senior community where most of the residents are on a fixed income. Because of this, the Board has not raised assessments in a long while and now we have some potentially severe maintenance issues coming up that we can't afford to pay for. What can we do?***

California Civil Code § 5600 requires your association to collect regular and special assessments in an amount that is sufficient to perform its obligations under the governing documents. Additionally, Civil Code § 4775 is clear that the repair, replacement, and maintenance of the common area is the association's obligation unless stated otherwise in the CC&Rs. The same is true for the exclusive use common areas, with the exception that the homeowners generally have the obligation to maintain these areas while the association will typically be responsible for repairing and replacing them. By failing to raise assessments and thereby allowing the association's property to go to waste, your board could be violating their fiduciary duties. There are times when deferring certain maintenance items may be unavoidable

for short periods of time. However, this should not be the normal course of action in an effort to simply avoid raising assessments in perpetuity. The reality of the situation is that the maintenance will need to get done, it will cost money, and the longer your association allows its property to fall into disrepair the more expensive it will be. The only proper response is to raise the regular assessments and/or levy a special assessment as needed to meet the Association's obligations. ⬆

*Sean D. Allen is a Senior Associate attorney with the law firm of Roseman & Associates, APC, which has offices in Southern California. Sean also serves on the CAI's California Legislative Action Committee (CLAC).*



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## Congratulations to our 2016 Chapter Volunteer Award Winners

### Speaker of the Year Award



**Ryan Gesell, CIRMS**

Timothy Cline Insurance Agency, Inc. for the August 2015 Luncheon, "Price is Right: HOA Edition"

### William S. Dunlevy, Esq. Award

(for their submission in the Chapter Magazine, Channels of Communication)



**Steven Roseman, Esq.**

Roseman & Associates, APC "Turning A Difficult Situation into a Good One" (Channels, 2nd Qtr)

**Jennifer Knauff, CMCA, CCAM**

Wave Enterprises, Inc. for her article, "Why Do We Need a Reserve Study" (Channels, 1st Qtr)

### Diane Doria Volunteer of the Year Award



**Christy Asher**

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**Colleen Scott, CMCA, AMS**

Anchor Community Management  
(not pictured)

### Rookie of the Year Award



**Nikki Keller**

Camarillo Pool Service

**Chelsi Rueter, CCAM, CMCA**

Community Property Management

**Laurel Sylvanus**

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### Distinguished Service Award



**Jeffrey Beaumont, Esq.,**  
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### Committee of the Year Award



– Luncheons Committee –

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**Tina Nakamura, CMCA, AMS, PCAM**  
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JANUARY 31 Los Robles Greens



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## Legislative Action Committee Updates and Announcements

By *Jasmine Fisher Hale, Esq.*

Twenty-seventeen is off to a roaring political start, and I don't mean in Washington. As most know, the California Legislative Action Committee's (CLAC) prior beloved advocate, Skip Daum, retired last year. We retained the services of Louie Brown, Esq. to serve our legislative needs and he is off to the races and wasting no time. This article will update our members on upcoming CLAC-sponsored legislation and remind everyone about the upcoming Legislative **Day at the Capitol** on April 23-24, 2017 in Sacramento, otherwise known as my favorite time of year!

I'm proud to announce CLAC has sponsored, not 1, not 2, but 3 bills during the upcoming legislative calendar! See, I wasn't kidding when I said Louie hit the ground running. AB 731 by Assembly Member Philip Chen (R-Brea) seeks to provide a tax deduction to homeowners for association dues up to \$5,000. AB 1412 by Assembly Member Steven Choi (R-Tustin) will provide qualified immunity for board members in multi-purpose buildings, which they presently are not afforded and can make it just a wee bit difficult to find people who are interested to serve on these boards. AB 1426 by Assembly Member Jacqui Irwin (D-Thousand

Oaks) seeks to reintroduce AB 1799 regarding uncontested board elections. Who doesn't want to remove quorum for uncontested elections and have tax write-offs for your assessments?

Next, it's that time of year again when the flowers blossom, bees buzz, and our legislators wake up from the winter hibernations and head back to Sacramento. I'm pleased to announce this year's **Day at the Capitol** event is on April 23-24 at the Hyatt Regency in Sacramento. This is truly a can't miss event where you can interact and engage with CLAC Delegates Steve Roseman, Esq. and Jeff Beaumont, Esq. and walk the halls of our capitol building to shape the important bills sponsored by CLAC. Please see Executive Director Leah Ross if you have any questions or if you'd like to sign up.

Finally, as the CLAC Liaison, I am responsible for two things (1) facilitating our Chapter's knowledge and understanding of key legislation that may affect common interest developments and (2) leading the CLAC committee's efforts. I'm so thrilled to report, in 2016, we had our best year ever for CLAC fundraising and exceeded our chapter contribution expectations. Truly, thank you for your continued support.

Joining the fight as Liaison, my goal was to increase our Chapter's engagement with our elected officials and this year it remains more important than ever. If we have any hope in helping to pass important legislation to make boards' and members' lives easier, it's going to take all of us rolling up our sleeves and joining the fight.

Nearly 2,400 bills were introduced, with more than 1,200 in the week before the deadline. Imagine that, CLAC's 3 bills are swimming in a big sea. Please be on the look-out for periodic emails inviting you to attend our local meetings with our elected officials. Together, we can exponentially expand our reach beyond what one or two alone can accomplish. Whether its joining CLAC for the **Day at the Capitol** or sending a letter to your assembly person supporting our legislation, all efforts matter and none go unnoticed. If you would like to participate, please contact Executive Director Leah Ross at [leah@cai-channelislands.org](mailto:leah@cai-channelislands.org). And thanks, for listening! 📌

**Jasmine Fisher Hale** is a Partner at the law firm Adams Stirling PLC and has been practicing law for 15 years. She specializes in representing community associations as their general counsel. Jasmine serves as the liaison for the California Legislative Action Committee for the Channel Islands Chapter of CAI.





## 2017 Chapter Calendar of Events

- APR 23-24 CAI-CLAC | Day at the Capitol (Sacramento)
- APR 25 Chapter Luncheon (Oxnard)
- APR 29 Board Leadership Development Program (Oxnard)
- MAY 3-5 CAI Annual Conference (Las Vegas)
- MAY 12 CMCA Review for Managers (Chatsworth)
- MAY 13 Board Leadership Development Course (Ventana Grill, Pismo Beach)
- MAY 17 Dinner Program, Los Robles Greens (Thousand Oaks)
- MAY 23 Chapter Luncheon (Oxnard)
- JUN 8 Dinner Program (Oxnard)
- JUN 15 Dinner Program (Pismo Beach)
- JUN 20 Chapter Luncheon (Oxnard)
- JUL 25 Managers' Program (Oxnard)
- AUG 3 Dinner Program (Thousand Oaks)
- AUG 29 Community Faire (Westlake Village)
- SEP 14 Dinner Program (Pismo Beach)
- SEP 26 Chapter Luncheon (Thousand Oaks)
- OCT 19 CID Law Course (Universal City)
- OCT 20 Statewide Legal Forum (Universal City)
- OCT 24 Chapter Luncheon (Thousand Oaks)
- NOV 3 Dinner Program (Pismo Beach)
- NOV 14 Chapter Luncheon (Thousand Oaks)
- DEC 5 Chapter Luncheon (Thousand Oaks)

Please Note: Event dates, times and locations are subject to change. Please check the chapter website: [cai-channelislands.org](http://cai-channelislands.org) for the most current information

Chapter Board Meetings & Annual Meeting: The meetings of the Chapter's Board of Directors are scheduled prior to each chapter luncheon at 10:15 am with the exception of October 24 where the Annual Meeting is scheduled for 11 am.

## CAI-Channel Islands Chapter Reaches 650 Chapter Members!

As of March 31, 2017, the chapter has reached 650 Members and we are excited for the continued growth and excitement this brings! And we are excited to offer additional programs in both Ventura County and San Luis Obispo County. Visit the chapter's website, [www.cai-channelislands.org](http://www.cai-channelislands.org) for more details. Thank you for your membership and continued support of the Chapter! We value it greatly and appreciate your involvement with CAI and in the community association industry as together, we are "Building Better Communities".



## Thank you to Jeff Beaumont, Esq. of Beaumont Gitlin Tashjian

for serving as Chapter President in 2016. We can't thank you enough for your leadership, guidance and commitment to CAI-Channel Islands Chapter, our California Legislative Action Committee and to this industry. Thank you!

*Pictured:  
2016 Chapter  
President, Jeff  
Beaumont, Esq.  
with Executive  
Director, Leah  
Ross.*



## Chapter Member Announcement

Tandem Property Management, a division of Lyons Management, Inc., is proud to announce that Integrity Management Group of Ventura was acquired effective January 1, 2017. We are pleased that Monica Cohen, former Integrity principle, will be joining Tandem to serve our association clients as Director of New Business Development and as certified Sr. Property Manager for the Ventura and Santa Barbara Counties. Monica will be handling those responsibilities along with Suzie Wilson, President and CEO of Tandem who will be overseeing Tandem's business development relationships. Tandem/Lyons continues its growth as a state-of-the-art property management services company, working with the board of directors and homeowners of its association clients with un-flinching dedication to our customers; board of directors, homeowners, and employees.

# Thank you

*to the following members for renewing your membership with CAI!*

## Community Association Volunteer Leaders

Li Adler, Varsity Park HOA • Teresa Chavier  
James DeGranffenreid, Poinesttia Gardens  
Julie Harvey, Westlake Bay Homeowners Association  
Linda Kaplan, Anacapa View Homes • Gail Ryff, Estates at Miraleste  
Adrienne Schuele • Pat Stone, Oak Ranch Estates Homeowners Association

## Community Association Board of Directors

Hancock Village • Las Jollas De Rancho Grande Homeowners Association  
Marlborough Seaside Village • Point Concepcion Owners Association  
Pepper Farms Homeowners Association • River Ridge Island Villas • Valle Del Sol

## Community Managers

Carolyn Abul-Haj, , AMS, EKAM, Inc. • Donna Apetz, J&D Bookkeeping Services  
Michelle Armstrong, PCAM, Good Management, Inc.  
Suzanne Bland, AMS Realty Inc.  
Tami L. Chavin, CCAM, AMS, PCAM, Community Property Management  
Monica Cohen, Tandem Property Management  
Michael Gartke, Gartze Accounting • Monique Holguin, AMS Realty Inc.  
Leona Jones, HarborWalk Homeowners Association  
McKenna Keays, Good Management, Inc.  
Sally Ann Reagan, CMCA, AMS, Encina Royale Inc.  
Andrea Ruhge, The Management Trust  
Paul Saccoccio, CMCA, Community Property Management

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# Welcome

*The Channel Islands Chapter of CAI welcomes the following new chapter members who joined in January - March 2017:*

## Community Association Volunteer Leaders

Barbara Castro, Anacapa Walk  
Kristina Gelazis  
Kathryn Grimes, Anacapa Walk  
Ursula Norby, Puerta Del Mar  
Lavonne Timm, Anacapa Walk  
Montego Oak Park Board of Directors  
White Oak Townhomes Owners Association Board of Directors

## Community Managers

Jan Christy, Coro Community Management & Consulting  
Scott Crandall, A Diamond Association Management, Inc.  
Steven Gasperson, Oak Shores Community Association Inc.  
Curtis Kelly, Kelly Management  
Cheramy Krueger, CMCA, AMS, Bear Valley Springs Association  
Caleb Lim, CMCA, Caleb Lim Services  
Raymond Metero, Spectrum Property Services  
Betsey Russell, Kelly Management  
Wesley Shryock, Bear Valley Springs Association  
Lola Traylor  
Debra Wolf, Kelly Management

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For more info: email [cai@cai-channelislands.org](mailto:cai@cai-channelislands.org).

**Oct. 20, 2017 | Universal City, CA**

# CAI Legal Forum

## CALIFORNIA COMMUNITIES

A one-day event for California community managers, association board members and other homeowners from Community Associations Institute—the leader in HOA education, advocacy and professional development.

*Critical updates on important legal requirements that impact how you work.*

*Essential information on key legal developments that impact where you live.*

For event details and registration, visit [www.caionline.org/events/CALaw](http://www.caionline.org/events/CALaw) or call CAI Member Services at (888) 224-4321 (M–F, 9 a.m.–6 p.m. ET).

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# Board Leadership Development Workshop

LEARN HOW TO BE AN EVEN MORE EFFECTIVE BOARD OF DIRECTORS.

**Education for homeowner leaders just got better.** The new CAI Board Leadership Development Workshop teaches you how to communicate with association residents, hire qualified managers and service providers, develop enforceable rules, interpret governing documents and more. It provides a comprehensive look at the roles and responsibilities of community association leaders and conveys information to help create and maintain the kind of community people want to call home.

Community association board members and volunteer leaders step up to take on positions of service and responsibility. They're expected to anticipate issues, solve problems, meet the expectations of their residents and protect property values.

The workshop will teach you how to become a more successful board member and how you can recruit and support new volunteers. You'll learn the role of the board, the president and other leadership positions, and you'll identify effective ways to work with professional managers and service providers.

The workshop consists of five modules:

- Module 1: Governing Documents and Roles & Responsibilities
- Module 2: Communications, Meetings and Volunteerism
- Module 3: Fundamentals of Financial Management
- Module 4: Professional Advisors and Service Providers
- Module 5: Association Rules and Conflict Resolution

## COURSE MATERIALS

The workshop includes a toolbox of support materials:

- *The Board Member Toolkit*, a best-selling book from CAI Press
- *The Board Member Toolkit Workbook*
- Brochures and publications, such as *The Homeowner & the Community Association*
- A copy of CAI's award-winning *Common Ground™* magazine

*In addition to a toolbox of support materials, each student receives a certificate of completion and recognition on the CAI website.*



**Saturday  
April 29, 2017**

8:30 am - 4:00 pm

Courtyard Marriott (Oxnard)

600 E. Esplanade Drive

Members: \$80 / Non-members: \$100

### Registration

Deadline: April 25

For more info and to register:

Chapter Office: 805-658-1438

[www.cai-channelislands.org](http://www.cai-channelislands.org)

### Sponsored by:

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**Saturday  
May 13, 2017**

9:00 am - 3:30 pm

The Ventana Grill

2575 Price Street, Pismo Beach

Members: \$80 / Non-members: \$100

### Registration

Deadline: May 8

For more info and to register:

Chapter Office: 805-658-1438

[www.cai-channelislands.org](http://www.cai-channelislands.org)

### Sponsored by:

General Pavement Management

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## Schedule of Events

**April 25**

Chapter Luncheon  
Oxnard

**April 29**

Board Leadership Development Workshop  
Oxnard

**May 3-6**

CAI Annual Conference  
Las Vegas

**May 12**

CMCA Study Session

**May 13**

Board Leadership Development Workshop  
Pismo Beach

For more information or to register,  
visit [www.cai-channelislands.org](http://www.cai-channelislands.org)  
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