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IN THIS ISSUE...

Tips Before Starting
Major Repairs

Energy Savings
When Electricity
is a Shared Cost

Integrated Pest
Management

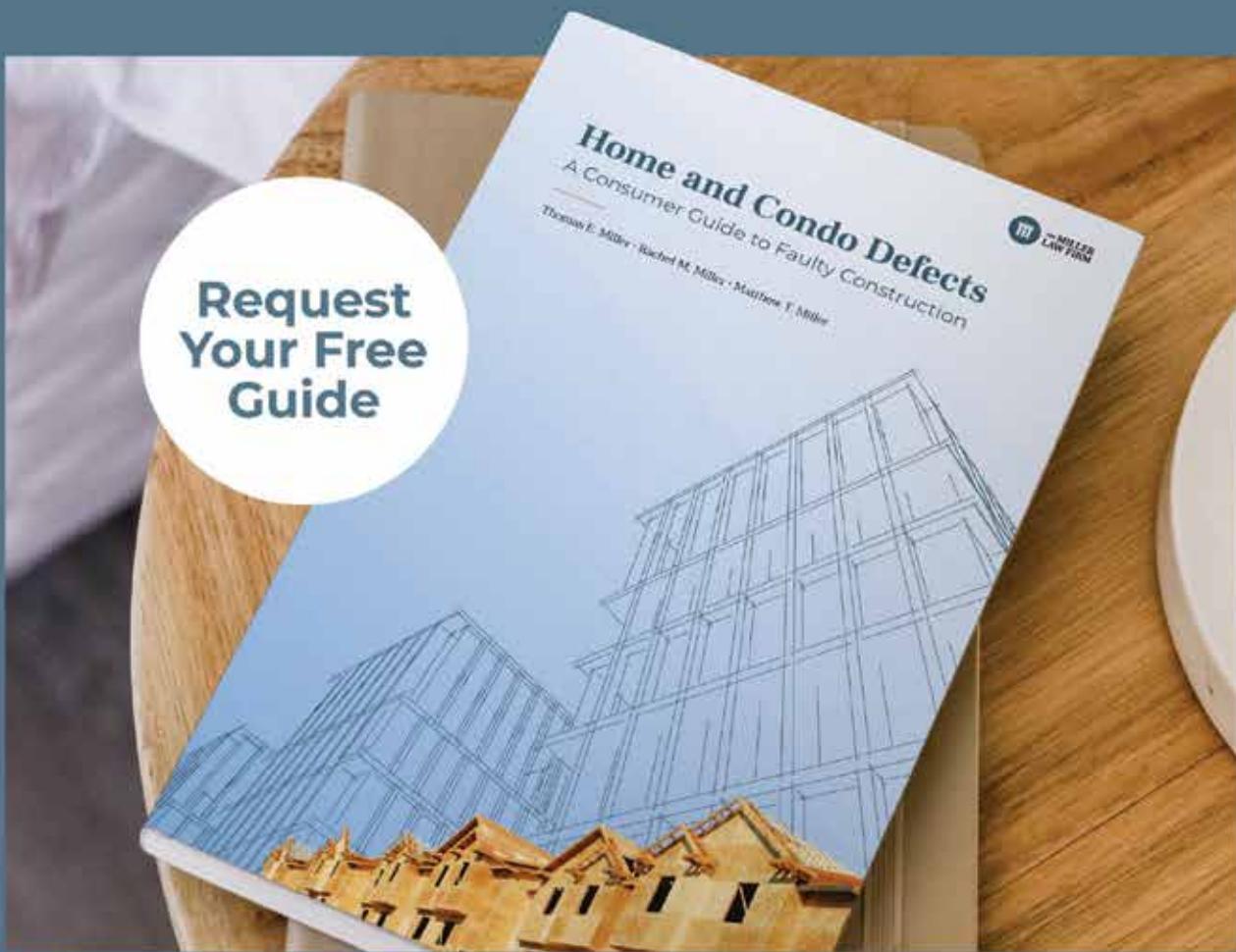
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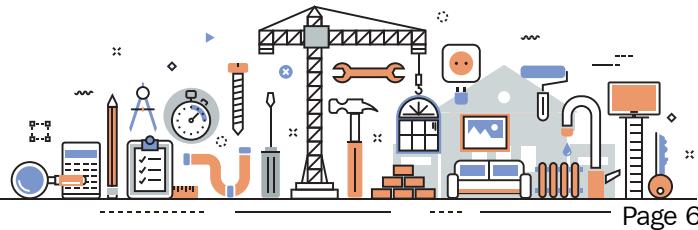


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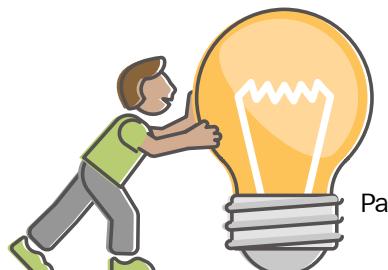
Page 6

Your Chapter

- 5** President's Message
- 24** Chapter Announcements
- 25** New and Renewing Members
- 26** Chapter Sponsors

Chapter Happenings

- 13** Breakfast Program:
The Sound & The Fury
- 22** CAI-CLAC Virtual Legislative
Week at the Capitol
- 24** 2022 Upcoming Events



Page 20

Channels of Communication is a quarterly publication of the Channel Islands Chapter of Community Associations Institute prepared expressly for Association leaders, managers and other related community association professionals. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is issued with the understanding that the publisher is not engaged in rendering legal, accounting or other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

The views expressed and the accuracy of

Special Features

- 6** Tips Before Starting Major Repairs
- 10** Energy Savings When Electricity is a Shared Cost
- 14** Integrated Pest Management: Safe and Effective Wildlife Control
- 16** Elevated Elements Inspection... Is Your HOA Prepared?
- 20** Can You Fight Ever-Increasing Utility Costs?
- 22** CLAC Advocacy Update

Resources

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

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Page 10



Page 14



Page 16



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Leah Ross - Executive Director
leah@cai-channelislands.org

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Dear Members:

I am honored to serve as your Chapter President for 2022. If this is your first time reading our chapter magazine, welcome! I think you will find it full of interesting and helpful articles and information. If you are a long-time reader of Channels of Communication, you already know that, but we commit to continue providing content that will make you look forward to receiving each issue.

I want to acknowledge the contributions of our Channels Islands Chapter Board of Directors, and particularly our Chapter President for 2021, Chelsi Rueter, plus our Chapter Executive Director, Leah Ross, who together led us through the past year. Although we may face challenges, these outstanding leaders have set us up for continued success moving forward.

I also want to thank the committee members that planned our virtual and in-person events in 2021 and the volunteers who spoke at those events. Building on what we learned in 2020, they spent hours structuring and organizing those events in a way that continued to protect and serve the needs of the chapter's members during challenging times.

Now, on to 2022! I am excited to lead our already thriving Chapter this year! Chelsi has set a high bar for me, and I hope to learn from her example. Despite the challenges we faced over the past two years, our chapter has over 950 members and continues to grow! That speaks volumes to not only the value we provide to our industry, but strength of the relationships we've made and nurtured with one another.

Our past and future success would not be possible without the members of our committees and chapter board who all volunteer their time to advance the chapter. We welcome and encourage involvement from all our members! Please reach out to Leah Ross at leah@cai-channelislands.org if you are interested in serving on a committee, speaking at a program, writing an article, or helping out in any other capacity. It would be our pleasure to have you!

The chapter board has met to brainstorm and strategize how best to navigate this year as we continue forward. As we progressed through last year, we all realized how much we missed by not meeting one another in person. Thus, for 2022 we have placed an emphasis on in-person events like luncheons, community faires, and happy hours, which have always been popular. However, in recognition that virtual programs also have a place in our provision of educational opportunities for our members, we have planned several webinars throughout the year. For a list of upcoming events, please visit the chapter's website, cai-channelislands.org.

Finally, we will continue to share with you the important work done by the California Legislative Action Committee (CLAC). This group consists of "delegates" from all eight California chapters of CAI which advocates at the California state legislature for the interests of planned communities, community managers, and others in our industry. Locally, we have a legislative support committee that works in our area to share pending legislation with our members and how we can have a voice in Sacramento. Also, we invite you to join us for CLAC's Legislative Week scheduled for April 18-21. This complimentary event will provide an opportunity to meet virtually with legislators in our area and CLAC Lobbyist Louie Brown will present sessions to learn what new changes are on the horizon. For more information and to register, please visit www.caiclac.com.

Thank you, truly, for being a part of our CAI-Channel Islands Chapter family. I look forward to seeing you all again soon, and throughout the year!

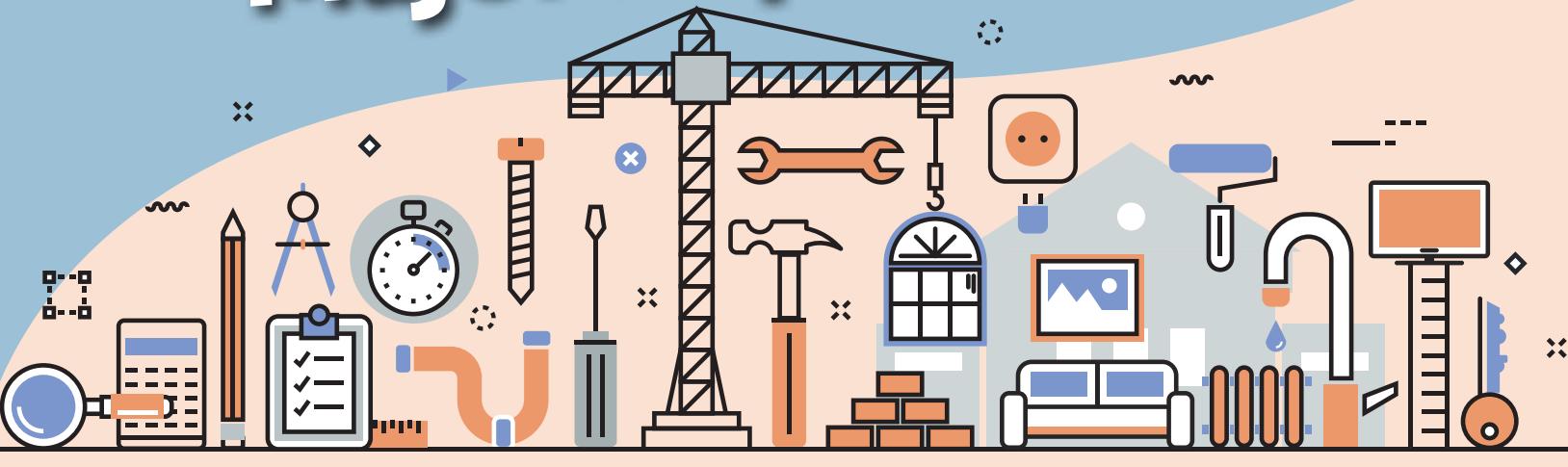
Best wishes,

Randy Stokes

CAI-Channel Islands Chapter President

president's message

Tips Before Starting Major Repairs



By Kelly Richardson, Esq., CCAL

Richardson Ober DeNichilo

One of the greatest challenges HOAs periodically face is major reconstruction. Whether a new roof, balcony rehabilitation, or other major repairs, the typical volunteer board and professional manager are not regularly involved in hiring for such work. Consequently, volunteer leaders and managers normally do not have the time or ability to protect the HOA in major projects from cost overruns or other problems. There are many cost and risk management pitfalls to avoid. Before sending the contract to legal counsel for review, consider these 12 planning tips.

1 WHAT does the HOA need?

HOAs often ask bidders to recommend the association's "scope of work," meaning the description of the work, and "specifications," the specific materials to be used. While contractors usually prepare proposed scopes of work and specifications without charge, if multiple bidders are involved it is critical that there be a consistent scope and specifications or the bids can't be properly compared to each other. Set a specific scope of work and then send it out to bid. That way you are comparing "apples to apples" in the bids and can better determine which proposal is truly the most cost-effective.

2 Consultants

Qualified consultants can advise the HOA regarding scopes of work and specifications, the form of the

contract arrangement, bid evaluation, and responding to contractor requests for extra money. Such consultants typically charge by the hour and act as the HOA's customer advocate during the project. Many HOAs would benefit greatly from such help. The type of consultant depends upon the type of project. Sometimes a roofing consultant is a good idea for a roofing project, but a general contracting background may be appropriate for other types of projects. Some management firms offer project management services, but it may be better to hire a completely independent expert firm to help with this consulting. Such expertise helps the directors stay within the Business Judgment Rule as satisfying their "reasonable inquiry" (aka "due diligence") requirement.

3 What kind of contract price?

A fixed-price bid is only one type of payment arrangement. Depending upon the circumstances, a contractor might be hired on a "cost-plus" basis, in which the actual costs of the work are marked up by an agreed percentage. Another type of arrangement is "time and materials," in which the contractor charges an hourly rate for their labor and is reimbursed for the cost of the materials provided (with or without a markup).

4 Lowest bid?

The cost of a project involving risks of substantial hidden damage (dry rot or termite, for example) may be very difficult for contractors to estimate and could drive

up the bid price. In that situation a “cost-plus” arrangement might prove better for both sides in certain types of reconstruction projects since the contractor is not locked into a fixed price and so would not need to pad their price for protection against further complications.

5 What's NOT in the bid?

There can be a number of ways a contractor protects themselves from costs which they are not confident estimating. One such technique is to note a particular item as “excluded” from the contract. A common abbreviation is “NIC” – Not Included in Contract. That means the cost is on top of the contract price. Another is the “allowance,” in which the contract places a number but it is a placeholder number, in which the contractor picks a number for, say, a fountain installation. If the ultimate price of the fountain is more than the allowance, the contractor will charge the extra to the HOA. Exclusions and allowances alert the customer that the contractor is not guaranteeing the price on those parts of the project, and behoove them to try to get more information to the contractor to hopefully reduce those exceptions to the fixed contract price.

6 Payment Schedule

Contractors often propose payment schedules based upon percentage of completion. However, how does the HOA know if the quoted percentages are accurate during the ongoing project? Seek more definite payment signposts than percentage of completion. Make sure there is a “retention,” or a hold-back of contract funds at the end of the project to make sure all work is satisfactorily completed. Retention funds are normally released to the contractor when the work is completed, the punch list of correction items is completed, and the HOA’s consultant has signed off on the project as accepted.

7 Test Project

In projects involving repetitive work such as decks or balconies, paying the contractor on a cost-plus basis for the first location may enable a solid fixed unit price for

the other locations. Also, you will come away from the test project with a better idea of what kind of hidden damage might be uncovered, enabling the HOA to prenegotiate unit prices on the kind of hidden damage items which are anticipated.

8 Licenses – Mandatory

Disqualify contractors without the right license for the job, or if their license number doesn't match their business name. Check licenses at www.cslb.ca.gov. I like to see a contractor that has held their license for many years. If the license is fairly new, and you check the lead person in the CSLB web site and you see that they have been through multiple companies and licenses, that might not inspire confidence.

9 Financing

If a bank loan or special assessment is the source of the funds, be careful about signing a repair contract before the money is in hand. It may take some time to begin to collect the assessment or to complete the loan process. Consider that timing in your contract commitment to the contractor.

(Continued on page 8)

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10 Project Budget

Consider other costs of the project which are outside the contractor bid. Contractors cannot be held to their contract price if there are hidden conditions which could not have been known during the bidding process, and there sometimes arise other costs which could not have been anticipated. Therefore, it's always a good idea to add an additional percentage to the budget for those unforeseen items by including a contingency line item in the HOA's budget. Your construction consultant can help the HOA determine whether the contingency should be 10%, 20% or something else.

11 Quality Control

Spending more money up front for the consultant to spot check the contractor's work may save money and headaches in the long run.

12 Other Planning Considerations

What will be the hours of work allowed? Is a place needed for storage of materials? How will residents be advised of work starting on their building or street?

"Measure twice... and cut once"

is the old construction saying.

The idea is good advance planning is always better than undoing mistakes. The more careful you are, the less luck you'll need! 

Kelly G. Richardson, Esq. is a former President of CAI, Fellow of the College of Community Association Lawyers, and Partner of Richardson Ober DeNichilo LLP.



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Energy Savings When Electricity is a Shared Cost

By Michelle Rodrigues, CMCA, AMS

Seabreeze Management Company

Rising utility costs have a great impact on all homeowners. For those in older condominiums that do not have individual electricity meters, this impact is felt differently than for those who are directly paying for electricity usage. Unfortunately, in these situations, residents don't "see" the impact and cost of their individual usage since it is lumped in with their neighbors on one bill, and paid without most homeowners ever getting a peek at the energy costs. The all-inclusive nature of these utilities can lead to wasteful habits, such as leaving lights on or HVAC systems continually running.

In these situations, the board should first look to the energy consumption that is directly controlled by the association: the common areas. Boards and managers should walk the community and determine what common area items are drawing power. Items can include things like:

- Common area lighting: hallways, parking garages, outdoor common area and landscape lighting, etc.
- Common area HVAC systems

- Major building components and mechanical rooms for amenities such as pool areas and clubhouses
- Appliances in amenity areas such as clubhouse refrigerators, dishwashers, etc.
- Appliances that serve or are used by Association staff such as break-room refrigerators or washing machines

Common area lighting is extremely important for both community aesthetics and safety, but is also generally the greatest source of common power consumption. Conversion of any incandescent or CFL lamps to LED lighting is a great first step toward significant reductions in energy consumption. Local utility companies often have rebate programs that associations can take advantage of when undertaking lighting conversion projects and there are vendors that will complete the conversions at no cost to the Association, with their payment coming from the collected rebate funds. Additionally, areas that are lit by daylight, like outdoor parking or landscape, should have timers or photocells installed to ensure that lights are not on when



the areas are naturally lit. Indoor areas like fitness centers, club rooms, restrooms, and utility rooms can have motion detector switches so that lights come on when there is activity, but remain off when the rooms are empty.

HVAC systems serving common area hallways, amenities like club rooms or clubhouses, fitness centers, or onsite offices may also be big energy users. Upgrading to programmable thermostats, and ensuring thermostats are turned off when rooms are unoccupied, will aid in reducing energy consumption. Regular preventative maintenance service and filter changes will also increase overall system efficiency.

In addition to HVAC systems, other major building components may be a significant draw on power. Elevators, mechanical equipment such as pumps, motors, pool equipment, etc. all require power to operate. Associations seeking to move toward greener systems and practices can have an ASHRAE (American Society of Heating, Refrigerating and Air-Conditioning Engineers) audit performed. This engineering study provides the board and management with guidelines for replacing components with energy-efficient ones and often includes rebate and incentive details for the board's consideration.

Many Associations also have appliances that are part of the common areas, management, or maintenance of the association. Older appliances such as refrigerators or washing machines should be replaced with energy efficient models. Often there are rebates available for trading in older models for energy efficient replacements.

Many of the above steps will have a short return on investment period in the energy savings that will be realized by the association along with reducing the overall energy footprint. In conjunction with tackling energy savings in the common areas, associations can also encourage energy conservation from the individual residents.

One option that associations have is to install individual sub-meters and bill each unit back for their electricity usage. This is a costly endeavor up front, especially for larger communities, however in the long run it is a large reduction in the overall energy budget for a community as each unit pays for their own consumption. This in turn encourages conservation because residents see the direct correlation between their energy use and the price they pay.

(Continued on page 12)

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For associations that do not wish to go that route, there are still ways to encourage conservation. The key is COMMUNICATION. Below are a few simple steps that associations may take to educate residents and encourage conservation:

- SHOW residents the overall community consumption. Your utility company's online portal has tools to view consumption and compare month over month or year over year information. Create a monthly one-page posting with the data and whether association consumption is trending up or down. Use visual cues like a green thumbs up to show reduced consumption or a red thumbs down if consumption has increased. Include information regarding using things like washing machines and vacuums during lower-tier times.
- TELL homeowners how they can conserve electricity. Talk about it in your board meetings. Have conversations with the residents. If you see a unit that has their lights on 24/7, consider giving them a call to encourage them to conserve.
- PROVIDE OPTIONS AND RESOURCES. Homeowners are much more likely to convert their individual lighting to LED, upgrade to a programmable thermostat, replace appliances with energy-efficient models, or utilize

advanced power strips if the resources are presented to them. Contact vendors for bulk rates or rebate options. Schedule HVAC service or dryer duct cleaning for the community. The easier it is, the more likely residents are to take advantage of the offer, and in turn overall community energy consumption will be reduced.

The age of a community should not have an impact on the ability of the community to implement energy efficiency improvements. Even small changes will reduce electricity consumption and move the association toward savings. 

Michelle Rodrigues has been a member of the Seabreeze Management team for eight years. She has worked with all kinds of associations, including new development, age restricted communities, and mid-rise condominiums, as well as serving as the General Manager for multiple high-rise and mixed-use homeowners associations. Michelle is currently a Director of Community Management, overseeing managers and associations in both Los Angeles and Ventura County.



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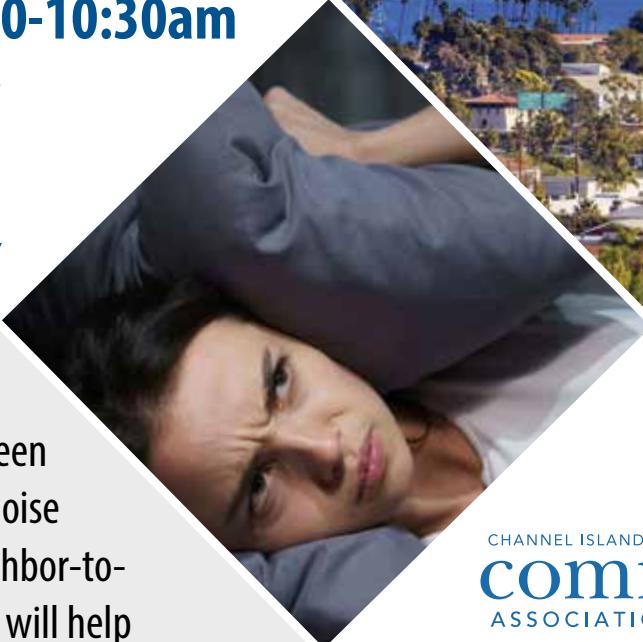


CAI-Channel Islands BREAKFAST PROGRAM

Fri., April 29, 2022 • 9:00-10:30am

The Sound & The Fury

Nuisances and annoyances are a frequent subject of contention between boards and homeowners including noise issues, angry homeowners, and neighbor-to-neighbor disputes. This presentation will help homeowner leaders and managers understand when an association is required to get involved, and the strategies needed to resolve issues before they escalate.



Community Associations Institute (CAI) provides education, resources, advocacy and networking to the Homeowners Association Industry.



LOCATION

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REGISTRATION

Register at www.cai-channelislands.org

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PROGRAM SPEAKERS



Chelsi Rueter, CCAM, CMCA, AMS, PCAM **Community Property Management**

Chelsi Rueter is the Operations Manager and Senior Community Manager at Community Property Management. She holds the highest designation in the industry, a PCAM. She is very active in the Chapter where she currently serves on the Board of Directors and as the Programs Committee co-chair.



Sean D. Allen, Esq. **Roseman Law APC**

Sean D. Allen, Esq., is a partner with the law firm of Roseman Law, APC, and is the head of the firm's HOA department for Ventura County and Central Coast. Having exclusively represented common interest developments for several years, he has broad experience with issues and disputes that impact community associations. Sean has served on the California Legislative Action Committee (CLAC) for our chapter since 2011 and is a current co-chair of the Programs Committee.

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Integrated Pest Management

Safe and Effective Wildlife Control

By Paul Townsend

Animal & Insect Pest Management

Poison kills – Nowadays, public perception of pesticides is under attack, with many already banned in California. Traditional pest control commonly used today are under a microscope due to damage to non-target animals and the environment. Our homes and HOAs need pest control to maintain a safe and healthy environment.

What can we do?

Integrated Pest Management, or IPM, is the answer. IPM focuses on developing ethical and effective pest management strategies that reduce the use of pesticides and prioritize a variety of non-pesticide solutions. IPM is most effective when used as preventative measures to limit pest infestations before they begin. These strategies include cultural, mechanical, biological, and chemical control methods.

It is understandable wanting to eradicate pests as quickly as possible as rodents or bugs in your home can be unsettling. However, a “spray everywhere” pesticide treatment is not the right approach. IPM methods limit pesticide usage and emphasize alternative ways to reduce pest populations. It is important to know pests need 3 staples to succeed in becoming established: food, water, and shelter. Removing any, or all, of those environments result in reducing pest populations. IPM provides tactics to address those three staples.

The first phase of IPM is cultural changes; or making lifestyle changes that help limit the growth of pest populations in the first place. The most common forms of cultural pest control are to close trash cans, keeps trash from overflowing, periodically clean trash cans; many types of pests are attracted to garbage as a food source. By eliminating the food source, pests will not be attracted to the area, and even if they do arrive, they won’t have the food source to sustain themselves. Another common issue is residents leaving pet food and water out. Like garbage, pet



food attracts pests; don’t provide a food source. Actively practicing cleanliness/sanitation and preventative cultural habits can reduce unwanted pest infestations.

The second phase of IPM is physical or mechanical and can be utilized to both prevent problems as well as react to an infestation. Pest control is most effective before an infestation; with minor planning, homeowners can protect their property by eliminating enticing environments. Physical alterations to your property such as plant placement and maintenance is an effective physical IPM technique. Thinning out plants and keeping them 3 feet away from the building removes shelter and access; skirting up plants by removing the lower branches and foliage can also help prevent pests from entering your home.

Obviously, holes in a structure of any size provide easy entry points for pests. Rats can fit through an opening the size a quarter and mice can squeeze through openings as small as a dime, seal holes any larger than a dime. Do not leave garage doors open – not even 1 inch. Caulking around window and door trim will help limit insect access.

If a problem has already established, physical control is the first reactive option. Live traps, snap traps, glue boards, etc. are used in many scenarios but can be cumbersome and cost prohibitive on a large scale. However, a well-



trained technician can use these tools to identify the problem location and recommend solutions prior to using a pesticide.

The third phase of IPM is biological. In other words, use nature to fight back. The type of plants that grow around your property can play a big part in attracting and repelling pest populations. In some cases, plants such as basil or bay leaf can help repel certain pests. Naturally attracting predators can cut down on pest activity, specifically pests that are affecting gardens or crops; examples of this would be raptor poles or owl boxes. Other examples are the use of ladybugs to control aphids on plants, or the use of mosquito fish in water to control mosquito larvae. Some biological

methods can be brought in to reduce the pest population prior to needing pesticides.

The final phase of IPM is the use of chemicals with the intent to reduce overall pesticide usage. Health and safety are priority when controlling pests and if the pest population doesn't react to the earlier phases of IPM, targeted pesticide usage is recommended. This phase most definitely must be done combined with other methods of IPM; if a property does not make recommended changes, the problem will most likely return, continuing the need for pesticides.

In IPM, the chemical phase does NOT mean "spray everywhere". Technicians use pinpoint applications, monitoring techniques to identify problem locations, with the intention to significantly reduce the use of chemicals on a site. The important thing to consider when using chemical control is safety for the environment, other animal populations, and of course, people. Pesticide usage is an acceptable form of pest management, but only when properly done.

Rat bait stations must be secured, locked, labeled, and maintained regularly. Sprays cannot be done if there is wind over 10mph, or rain is in the immediate forecast. Applicators must have specific licenses; landscape pest services require a Qualified Applicators License (QAC), termite treatments require a Structural Pest Control Board (SPCB) Branch 3, and insect or rodent treatments require a SPCB Branch 2.

Ultimately, is the IPM approach right for you? The simple answer is yes —all homeowners, HOAs, businesses, etc., can effectively limit or even resolve their pest issues by using IPM measures. Integrated pest management techniques help reduce the pest problems before they begin, lowers pesticide usage, is better for the environment, and are vital in producing effective results. 

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Paul Townsend is Operations Manager for Animal & Insect Pest Management Inc. since 2007. He holds a Structural Pest Control Field Representative license in both Branch 2 and 3, a Department of Pesticide Regulation Qualified Applicators License, and CA Department of Fish and Wildlife Trapping. He can be reached at ptownsend@myaipm.com.



Elevated Elements Inspection...

Is Your HOA prepared?

By **Les Weinberg, RS, MBA & Scott Clements, RS, PRA, CMI**

Reserve Studies, Inc.

California is typically at the forefront with respect to laws governing HOA's. An example is the more recent § 5551 of the California Civil Code (CCC), also referred to as SB326: Exterior Elevated Elements Inspections (EEEI).

Brief History

Not long ago, a tragic accident in Berkeley, CA occurred, involving a group of people standing on a balcony when the wooden structural supports failed and the deck collapsed, falling some 30 feet to the street. Six people were killed and seven others severely injured. In response to that, a new law was enacted which requires that certain wood framed elevated elements (balconies, decks, stairs, walkways) that protrude from the main structure be inspected by a licensed architect or structural engineer to ensure that the structural elements are sound, and that any railings serving the areas are secure.

What it Includes

At a minimum, detailed inspection of load bearing components and associated waterproofing or building envelope systems is required...including flashing, membranes, coatings, and sealants that protect the load-bearing components from exposure to moisture. In addition,



intrusive investigation: i.e. cutting away stucco or siding to access the structural elements may be necessary. The report must contain a list of the elements for which the HOA has maintenance and repair responsibility, recommendations for repair or replacement of the systems identified, and the expected remaining useful life of those components. Included are multi-family (3 units or more) wood-framed buildings only; those constructed of steel, masonry, concrete, or a combination thereof, are exempt. Per the CCC, the findings of the report are to be included in the association's Reserve Study.

Timelines

The initial EEEI must be conducted and incorporated in the association's Reserve Study by January 1, 2025, or six years from date of completion for buildings constructed after January 1, 2020, and no less than every nine years thereafter in coordination with the Reserve Study inspection pursuant to §5550. Therefore, HOA's should budget to have the EEEI performed no later than during the 2024 fiscal year, if not earlier, to avoid the inevitable spike in fees to come as the supply and demand principles collide in 2024.

Estimated Costs

The costs of the EEEI may vary widely, based on the type of construction, accessibility of the elements (may need

extension ladders or scaffolding), associated materials that must be examined, destructive work, and associated restoration costs. Current inspection costs have been reported in the \$800-1,200 per deck inspected, or approximately \$500 per unit (i.e. not all units may have decks that require inspection). Multiple areas will need to be evaluated, and an HOA of 150 units may anticipate **inspection** fees in the \$75,000 – 150,000 range. Note, this does not include the costs of potential **remediation**. Providers are required to inspect a “statistically significant sample”, translating to a sufficient number of units inspected to provide 95% confidence that the results from the sample are reflective of the whole, with a margin of error of no greater than +/- %.

Impact on Reserves

Some good news: EEEI, as well as any remediation costs, would be considered reserve expenditures. However, these added liabilities will result in a reduction of the percent funded and have the potential to accelerate the need for substantial increases to the reserve contributions. If reserves are poorly funded, special assessment(s) are likely.

Advice for HOA Boards

- Procure bids for EEEI from providers who work with HOA's having appropriate experience and insurance coverage to undertake the scope of work necessary.
- Update the current Reserve Study to include the estimated cost of the EEEI.
- Prepare for the inspection:
 1. How and when will the elements need to be accessed?
 2. Is individual unit access required? If so, which units?
 3. To what extent will homeowner cooperation be needed?
 4. Determine the potential impact on the daily activities of the members.
- 5. Communicate the procedures to the homeowners in advance, updating on a regular basis.

The CCC states the specific requirements, and it is the responsibility of the HOA to provide the information to the membership via the Reserve Study and its associated Funding Plans. The sooner the requirements are addressed and budgeted for, the greater the ability to spread out the associated costs over a longer period of time.

(Continued on page 18)

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Elevated Elements Inspection (Continued from page 17)

The language in California Civil Code Section §5551 is detailed in its requirements, however, recognizes the prepares discretion in determining the scope and methodology of the Elevated Elements Inspection, and the specific reporting of the findings. The photos provides some examples of construction commonly encountered and the relevance to the requirements outlined in the law, however, these are offered for information purposes only, as all Associations will need to consult with a licensed professional to determine the needs of their communities responsibilities. 



Wood framed, elevated, railings subject to fallibility; inspection requirements likely apply



Wood framed, elevated, railings subject to fallibility; inspection requirements likely apply



Wood framed, elevated, railings subject to fallibility. Note the presence of ventilation; inspection requirements likely apply



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Metal framed stairs likely exempted; however, decks are wood framed, elevated inspection requirements likely apply



Concrete and steel construction; elevated inspection requirements likely does not apply. Railing should still be inspected regularly.



Wood framed, elevated, railings subject to fallibility; inspection requirements likely apply



Decorative element, not designed for human occupancy; elevated inspection requirements likely does not apply



*Does not protrude, likely does not apply.
Railing should still be inspected regularly*

Les Weinberg, MBA, RS, EBP, is the Chief Financial Officer and **Scott Clements, RS, PRA, CMA®**, is the Chief Executive Officer of Reserve Studies Inc, a full service property consulting company and Reserve Study provider, headquartered in Cerritos. They can be reached at les@reservestudiesinc.com and scott@reservestudiesinc.com, respectively.



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Can You Fight Ever-Increasing Utility Costs?

By Erin Kelly, Pacific Utility Audits

With extreme weather and severe droughts grabbing headlines, rising utility costs seem unavoidable.

In California, utility costs have been on an upward trend for the last quarter century, going back as far as the previous California droughts in the late 1980s and early 1990s, when water became scarce and a precious commodity.

Coupled with cost increases resulting from deregulation, trash franchising, tiered and penalty rate pricing and other utility industry issues, utility costs continue to grow every year — draining the reserve funds of community associations and prompting them to look for ways to reduce their utility bills.

The reduction of common-area utility bills seem to be one area where many boards feel confused or powerless, delegate this responsibility to landscape committees, managers or others, or attempt to reduce these costs by energy management or conservation techniques alone. Since utilities are usually the top 3 budget expenses, these should be delegated to a professional.

Cut costs with utility auditing

Utilities now rank among the top budget cost for almost all associations and communities in California. As associations and businesses have increased their utility budgets each year to accommodate rate increases, many have lost sight of exactly how much utilities are truly costing them.

Is it possible to fight these ever-increasing costs?

Communities do have an ally in the battle against rising utility rates: a *utility audit*. A utility audit is an in-depth examination of your organization's utility bills, and includes a visit to your property to inspect *all* the onsite utility services (e.g., water, sewer, gas, electric, telephone, trash) that are billed to your community. Not to be confused with an *energy audit*, a *utility audit* looks at all of the common-area utility bills and what is actually being charged per sewer unit, per gallon of water, per kilowatt hour of electricity, per gas therm, in addition to telephone and trash costs.

This in-depth utility audit can locate utility billing errors such as decimal point errors, wrong rates, incorrect service charges, incorrect meter multipliers, sewer fees billed for irrigation water, tax errors, and many other overcharges to give you back money now. A utility audit can also find you lower-cost utility rate schedules available through your existing utility provider to lower your future per-unit costs for water, sewer, gas, electricity, telephone and trash.

Generally, a utility audit can decrease a community's annual utility budget by 20% with no equipment expenditures and no change in use or consumption! A utility audit may put money into an association's reserves, with no out-of-pocket cost to the association. With extra reserve money, any association is better prepared to deal with disasters.

Utility charges are on an upward trend with no end in sight. The good news: You can hold back and even reverse increases in electric, water, sewer, gas, telephone and trash bills.

Energy Audit vs. Utility Audit

What's the difference? An *energy audit* examines and recommends ways that an association can reduce the overall usage of their utility consumption by installing energy efficient equipment, retrofitting existing equipment to be more energy-efficient or changing increase utility conservation and reduce the total number of units used. An *energy audit* will recommend the use of

energy conservation devices and methods, such as LED lighting, light timers, drought-tolerant landscaping, low-flow toilets and showerheads, smart irrigation controllers, energy efficient boilers, timer switches for laundry room lights, reduced hours of use for pool pumps or tennis court lighting, etc.

A *utility audit* determines if there are any billing errors or overcharges that would entitle the utility customer to a refund from the utility company and/or obtain lower utility rates from the utility company. In most instances, associations are overpaying simply because they are not





aware of how their utility bills are calculated. This type of audit reduces the rates that you actually pay per unit of utility and eliminates any utility overcharges that most associations are not even aware of! In addition to obtaining refunds from your utility providers for past overcharges, the future utility costs are lowered through either the correction of these utility billing errors or the application of new, lower rate schedules from your utility providers.

Reduce Overall Utility Consumption AND Reduce Per Unit Cost Of Utilities

All communities should have **both** types of audits, in addition to rebates, conservation and possibly brokering. This would ensure that the community is managing its utility consumption in the most efficient manner (*energy audit*) AND paying the lowest per unit cost for all utility consumption (*utility audit*). These services should be no different than scheduling the annual financial audit or reserve study.

To make the biggest impact on overall reduction in all common-area utility expenses, an association should explore all of the following:

- **Utility Audit:** Do this first so that if utility billing *undercharges* are discovered (which happens), then the association is alerted to these undercharges by the utility auditor - without incurring a large backbill for these billing undercharges from their utility company!!
- **Rebates:** Explore all available rebates or retrofitting programs available with your existing utility providers and/or cities and counties by visiting their websites or contacting them directly. At this time, LADWP has over 12 rebates and conservation programs available for communities.
- **Energy Audit:** Hire an energy management company to conduct an energy audit of the property to discover additional ways that the association can reduce utility consumption, such as new equipment, energy efficient lighting, drought tolerant landscaping, etc.
- **Brokering:** If the association uses a significant amount of electricity or gas, purchasing gas through a gas broker may be a good option to reduce the cost of electricity or gas.

(Continued on page 23)


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CLAC Advocacy Update

By Louie A. Brown, Jr., Esq.



The bill introduction deadline came and went and no bills attacking the CID community were introduced. However, we will have our hands full with a number of other issues, like ADUs, insurance, and other housing issues that impact our communities, but are not solely focused on CIDs.

We have a number of task forces reviewing legislation and recommending positions to our delegates. By next month, we will have our Hot Bills list updated and ready to go for the legislative session. This will start to create the agenda for our Virtual Legislative Week at the Capitol which will be held Monday, April 18th – Thursday, April 21st. The agenda for that event is starting to come

together and it's going to be fantastic. In addition, mark your calendar to join CAI-CLAC on Wednesday, April 6th for our Virtual Town Hall: Get Ready for Legislative Week that will begin at noon. If you have not registered, go to the Legislative Week event page and the Town Hall calendar event on CLAC's website, www.caiclac.com. These events are FREE to attend but the experience will be priceless!

Our efforts on insurance continue as well. Thank you to everyone who contributed to our Call to Action. The information we received is overwhelming and will definitely help us make our case to the Legislature and Insurance Commissioner for solutions.

I am also starting to work with Chapter Legislative Support Committees

on local lobby days. Depending on the legislator, some of these may actually take place in person! If you are interested or would like more information, please contact your chapter's executive director for more information.

As always, stay up to date on CAI's advocacy efforts in California by visiting www.caiclac.com and joining CLAC's eNews list. [⬆️](#)



Louie Brown, Jr., Esq. is our Legislative Advocate in Sacramento for CAI's California Legislative Action Committee and may be reached at lbrown@kscsacramento.com.

April 18 – 21, 2022
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Legislative Session
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These virtual visits are more important now than ever – and can be done in the comfort of your home or office. **Register or learn more at caiclac.com.**

CAI-California Legislative Action Committee

Together, We Have A Voice!

Our mission is to safeguard and improve the community association lifestyle and your property values. The legislation we monitor, support, or oppose has a direct impact on the communities you live in, work with, or manage. Partner with CAI-CLAC and support our efforts so we can represent your community's voice at the capitol!

Here's how you can help:

- Sign up to receive CLAC's Call For Action emails and stay up-to-date on bills affecting our industry.
- Support CLAC through a financial contribution through the "Buck-A-Door or More" Campaign.
- Participate on the Chapter's Legislative Support Committee.

**For more information, email cai@cai-channelislands.org or visit:
www.caiclac.com www.cai-channelislands.org**



Can You Fight Ever-Increasing Utility Costs? (Continued from page 21)

In Summary

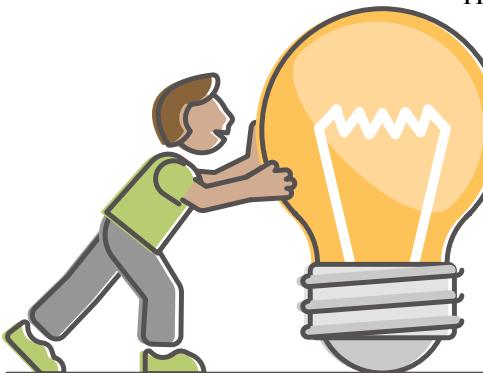
Harbor Gate Homeowners Association – a community with 179 condominiums located in San Pedro- has received refunds of \$7,694.26 from LADWP for solid waste overcharges, \$1,309.57 for electric overcharges, and \$7,673.74 for water overcharges. Their annual utility expenses have been reduced by \$2,094.00 for telephone expenses, \$1,500.00 for solid waste fees, \$4,800.00 for electricity costs and \$9,000.00 for water charges. “*Your services were great!*” Ariel Hess CCAM, CMCA, AMS and Community Association Manager for Scott Management Company

Another recent example of the utility audit saving opportunities for a community is California Place

Homeowners Association – a community with 212 condominiums, located in Tarzana. By reducing their sewer service charges through LADWP, a utility audit resulted in a refund of \$34,079.94 for them earlier this year. In

addition, they will now reduce their annual sewer service charges by approximately \$17,000.00 or more! “*As I am doing the budget for 2022, my expenses for my utilities have gone down considerably thanks to you! I don't need to do as much of a dues increase for the next calendar year. It would really behoove every manager to explore doing this service for every one of their associations.*” Marcia Coppola, CMCA, AMS, PCAM and Vice President of Manager Development for HOA Organizers. ♣

Erin Kelly, the Director Of Operations for Pacific Utility Audit, Inc., has been involved in the association industry for 30 years. As one of the original founders of Pacific Utility Audit, Inc., her intent was to offer a utility auditing service in order to help other property managers who were facing the same type of problems that she had faced as a manager in dealing with utility budgets and concerns. Her educational background includes a B.S. Degree in Business Administration from Pepperdine University, and an M.B.A. Degree in International Business, also from Pepperdine University.



2022 CHAPTER EVENTS

April

- 29 **Chapter Breakfast**, 9 am, Spanish Hills Country Club, Camarillo

May

- 4-7 **CAI Annual Conference**, Orlando, FL
10 **Managers' Webinar**, 11 am, Zoom
26 **Chapter Luncheon**, 11:15 am, Spanish Hills Country Club, Camarillo

June

- 23 **Central Coast Luncheon Program**, 11:30 am, Nipomo
30 **Community Faire**, 4 pm, Spanish Hills Country Club, Camarillo

July - no events -

August

- 4 **CLAC Bingo & Brews**, location TBA
11 **Chapter Webinar**, 11 am, Zoom
25 **Chapter Luncheon**, 11 am, Spanish Hills Country Club, Camarillo

September

- 13, 20, 27 **Board Leadership Development Webinar Series**, 10 am, Zoom
15 **Central Coast Luncheon Program**, 11:30 am, Nipomo
29 **Community Faire**, 4 pm, Camarillo

October

- 27 **Chapter Luncheon**, 11:15 am, Spanish Hills Country Club, Camarillo

November

- 10 **Central Coast Luncheon Program**, 11:30 am, Nipomo
17 **Chapter Luncheon**, 11:15 am, Spanish Hills Country Club, Camarillo

December

- 1 **Holiday Happy Hour**, 5-7 pm, Westlake Village Inn
15 **Chapter Luncheon**, 11:15 am, Spanish Hills Country Club, Camarillo

For more information & to register, visit www.cai-channelislands.org

Congratulations to the following manager members for earning industry credentials!



CHRISTI MOORE, Leisure Village Association and JERRI GADDIS, HOA Organizers, earning the highest professional recognition

available nationwide to managers who specialize in association management, the Professional Community Association Manager (PCAM) designation.



GRAELIN YOUNG, Community Property Management (pictured with Leah Ross, Executive Director), earning the Certified Managers of Community Associations (CMCA) certification and Association Management Specialist (AMS) designation.

Meet Our Chapter Boards Members!

Each magazine issue features a few of our chapter board members who will share why they appreciate CAI-Channel Islands Chapter!

SABRINA FRENCH, CMCA, AMS, PCAM, PMP Management

Currently serves as Chapter Vice-President, Holiday Happy Hour Committee Chair, and serves on the Awards Dinner Committee; Member for 8 years



Before joining CAI-Channel Islands, I was a community manager for approximately 4 years, I felt lost at times and didn't know where to turn for resources or guidance on how to handle certain situations. Fast forward to today, not only have I served on the Chapter Board, multiple committees, and attended a variety of different seminars but I have gained so much more by participating within the chapter. Not just the long-standing relationships, that have grown to friendships, but the wealth of knowledge and confidence in understanding that I am not in this alone and have the support and guidance from those within the industry as well. Being that the chapter has had this incredible effect on my career, I encourage and push all of my team to get involved and attend events, and I can see that it is once again doing the same for them!

CHRISTY ASHER, Spectrum Property Services

Currently serves as Chapter Treasurer and on the Financial Committee; Member for 20+ years



CAI's resources, education, and industry inclusive memberships are all valuable tools for our association boards as well as management staff. The networking community that our chapter enables us to develop cannot be found anywhere else. This opens the doors to a plethora of information, advice, and education for all facets of community association management.

chapter announcements

Thank you

to the following members for renewing your membership with CAI!

Community Association Volunteer Leaders

James Robert Bruns • Bret McNulty, Pebble Creek Park Association
Ursula Norby, Puerta Del Mar • Adrienne Schuele • Jane Shults, Creston Hills Ranch
Association • Carol Stamey, Carefree Living Association
Pat Stone, Oak Ranch Estates HOA

Community Association Boards of Directors

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Channel Pointe Maintenance Corporation
Coral Tree Villas I Owners Association • Courtyard Villas
Green Meadow Estates • Hillcrest Garden HOA
Hitching Post Estates • Kjaergaard Owners Association • Los Robles Estates HOA
Lynn Meadows Association • Mountain Meadows Villaggio
Montaire Homeowners Associatoin • Monte Sereno Condominium Association
North Oaks HOA • Palm Colony Condominiums HOA • Persimmon Hill HOA
Poinsettia Gardens Association • Rancho Adolfo Estates Association
Village Green Property Owners Association • Waypointe Neighborhood Association
Westlake Village First Neighborhood Association

Community Managers

Carolyn Abul-Haj, EKAM, Inc. • Lupe Aguilera, Spectrum Property Services
Michelle Atkinson, Ross Morgan & Co. • Ruth Campbell, CCAM-PM, CMCA, CID
Management Solutions, Inc. • Miah Calderon, CMCA, AMS, CPM
Bryan Chan, Neighborhood Community Management, Inc. • Sheldon Chavin, CPM
Tami Chavin, AMS, PCAM, CPM • Ruth Cederstrom, CCAM, PCAM, Concord Consulting
& Association Services • Mikaela Collerd, AMS, PMP Management
Cheryl Crandall, AMS, A Diamond Association Management, Inc. • Brandon Grosh, AMS,
PCAM, PMP Management • Carol Henderson, Leisure Village Association
Kevin Lehman, CMCA, AMS, PCAM, Blue Horizon Management • Jeff Lucero, Premier
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Whitestone Industries

Welcome

to our new members!

Community Association Volunteer Leaders

Georgie Israel Gerardo, Acacia Road
Condominium Association
Daniel Finnegan

Community Association Boards of Directors

Camarillo Springs Townhomes Association
Oak Park Village

Community Managers

Samantha Bankston,
Blue Horizon Management Co.
Michael Agajanian,
Community Property Management

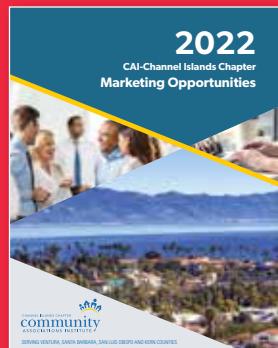
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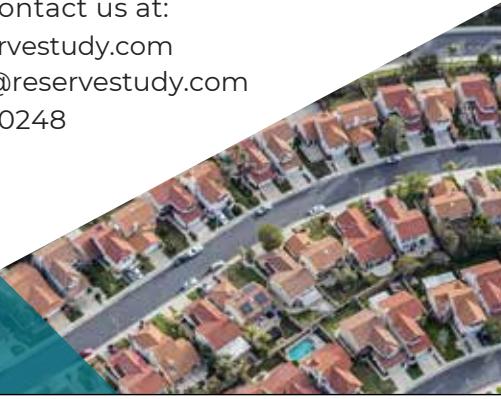


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ACCESS CONTROL / GATE ENTRY SYSTEMS	
BAI - Barcode Automation, Inc.	4, 28
ASPHALT/PAVING/CONCRETE	
Diversified Asphalt Products.....	Inside Back Cover
ATTORNEYS FOCUSING ON CONSTRUCTION DEFECTS	
The Miller Law Firm.....	Inside Front Cover
CERTIFIED PUBLIC ACCOUNTANT	
Newman CPA.....	28
Porter & Lasiewicz CPAs.....	27
EMERGENCY WATER & FIRE RESTORATION SERVICES	
First Onsite Property Restoration	18
FENCE & RAILING	
Fenceworks, Inc.....	28
FINANCIAL SERVICES	
Alliance Association Bank.....	7
CIT	8
INSURANCE	
Steve D. Reich Insurance Agency	12
JANITORIAL & MAINTENANCE	
The Cleaning Lady Company	21
MANAGEMENT COMPANIES	
CID Management Solutions, Inc.	19
Concord Consulting & Association Services	18
Professional Community Management - An Associa Company	4
Spectrum Property Services.....	21
The Management Trust.....	15
PAINTING	
Austin's Painting.....	19
EmpireWorks Reconstruction	11
Ferris Painting	8
Select Painting & Construction, Inc.....	27
Sherwin Williams	9
PEST CONTROL	
Cragoe Pest Services, Inc.....	28
RESERVE STUDIES	
Association Reserves.....	28
Complex Solutions LTD.....	4
Reserve Studies, Inc.	7
ROOFING	
Top Armor Roofing, Inc.	18
Alliance Association Bank.....	7
allianceassociationbank.com	
Association Reserves.....	28
reservestudy.com	
Austin's Painting.....	19
austinspaintinginc.com	
BAI - Barcode Automation, Inc.	4, 28
barcode-automation.com	
CID Management Solutions, Inc.	19
cidmanagementsolutions.com	
CIT	8
cit.com	
Complex Solutions LTD.....	4
complexsolutionsltd.com	
Concord Consulting & Association Services	18
concordconsulting.net	
Cragoe Pest Services, Inc.....	28
cragoe.net	
Critter Busters	Outside Back Cover
critterbusters.com	
Diversified Asphalt Products.....	Inside Back Cover
diversifiedasphalt.com	
EmpireWorks Reconstruction	11
empireworks.com	
Fenceworks, Inc.....	28
fenceworks.us	
Ferris Painting	8
ferrispainting.com	
First Onsite Property Restoration	18
firtonsite.com	
Newman CPA.....	28
info.hoacpa.com/ci	
Porter & Lasiewicz CPA.....	27
pl.cpa	
Professional Community Management.....	4
An Associa Company associaonline.com	
Reserve Studies, Inc.	7
reservestudiesinc.com	
Select Painting & Construction, Inc.....	27
select-painting.com	
Sherwin Williams	9
sherwin-williams.com	
Spectrum Property Services.....	21
spectrumprops.com	
Steve D. Reich Insurance Agency	12
steverreichinsurance.com	
The Cleaning Lady Company	21
thecleaningladycompany.com	
The Management Trust.....	15
www.managementtrust.com	
The Miller Law Firm.....	Inside Front Cover
constructiondefects.com	
Top Armor Roofing, Inc.	18
toparmorroofing.com	

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- CAI-CLAC is working toward legislative solutions that are right for California homeowner associations and their members. Donating just a Buck A Door (or more) helps support those efforts.
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