Channels of Communication

Serving Ventura, Santa Barbara, San Luis Obispo, and Kern Counties *FIRST QUARTER 2026*

The Official Publication of
CHANNEL ISLANDS CHAPTER
community
ASSOCIATIONS INSTITUTE

IN THIS ISSUE...

Budgeting – A Community Manager's Point of View

The Case for Annual Reserve Study Updates

Maintenance: The Key to Extending the Life of Aging Communities

The Board Debates but Deferred Maintenance Can't Wait

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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.

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

The Channel Islands Chapter of Community Associations Institute is dedicated to empowering Homeowner Association members, managers and service providers through information and educational opportunities.

CAI-CHANNEL ISLANDS COMMUNITY FAIRE

Main Street CONNECTIONS

Your Marketplace for Networking, Knowledge, and Resources

Board Members and Managers— take a stroll down Main Street and visit industry vendors, join our featured educational session, and connect with community leaders along the way.

THURSDAY
APRIL 30
3:30-6:00 PM
Hyatt Regency Westlake
880 S. Westlake Blvd.

REGISTRATION

This event is complimentary for HOA board members / homeowners who are CAI members and complimentary for community managers. Advance registration required by April 27.

For more information and to register: cai-channelislands.org or call 805-658-1438

EVENT SCHEDULE

3:30 PM EDUCATIONAL SESSION

Now Showing: The Hatfields, the McCoys, and Your HOA

Take a front-row seat to the drama of neighbor disputes! Learn how your HOA can navigate conflicts, distinguish nuisances from typical complaints, address safety and legal concerns, and enforce rules—all while protecting your community and minimizing liability.

4:30 PM EXPLORE MAIN STREET

Stroll down Main Street and visit over 45 industry vendor booths. Enjoy marketplace treats, café bites, and giveaways!

Managers' Hosted Happy Hour

Community managers connect with event sponsors at the local pub—network and unwind!

6:00 PM VENDOR GIVEAWAYS

Make your way around town to see if you're a winner of the vendor giveaways!

CAI provides education, resources, and advocacy to the Community Associations industry.
Learn more at cai-channelislands.org.

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president's message

Lisa Tashjian, Esq., CCAL
Beaumont Tashjian

I am honored to serve once again as President of the Channel Islands and Central Coast Chapter of the Community Associations Institute. This year is particularly meaningful as we celebrate the Chapter's 45th anniversary, a milestone that reflects decades of collaboration, advocacy, education, and service to our community associations industry.

Our chapter strategic planning session set a strong foundation for the year ahead, and I am genuinely energized by the dedication, experience, and enthusiasm of our Board of Directors. Together, we are focused on advancing CAI's mission while continuing to provide meaningful value to our members: homeowners, board members, community managers, and business partners alike.

Education remains at the core of what we do. The Chapter will continue to offer insightful programs, dynamic speakers, and relevant resources designed to address the evolving challenges facing community associations. From legislative updates to practical governance and management tools, our goal is to ensure our members are informed, supported, and empowered.

Advocacy is also a key priority. We remain committed to supporting CAI's legislative efforts through CLAC and encouraging member participation in protecting the interests of community associations at both the state and local levels. When we work together, our collective voice truly makes a difference.

Equally important is fostering connection. The chapter thrives because of the relationships built through events, committee involvement, and shared professional engagement. I encourage you to get involved by attending an event, joining a committee, or simply connecting with fellow members. These opportunities strengthen not only our Chapter, but the industry as a whole.

I am grateful for the trust placed in me and for the continued commitment of our members and volunteers. I look forward to an exciting, productive year as we honor our past, celebrate our present, and continue building a strong future together.

I hope to see you at an upcoming Chapter event. Our theme this year is "Built to Last"…. 45 years of growth, success and connections…. Cheers to the next 45 years!!!

Warm regards,

Lisa Tashjian

Lisa Tashjian, Esq.
2026 President, CAI-Channel Islands Chapter

A Community Manager's Point of View

By Danita L. Vaughn, CMCA, AMS, PCAM
Concord Consulting & Association Services

Every year, the Board of Directors is tasked with making hard financial decisions for their community association members. As a community manager, we do our best to provide the information needed to make these informed decisions.

As a community manager we don't want increased assessments any more than the owners or the Board of Directors. While no one wants assessment increases in today's financial climate, adequate funding is necessary to cover both operating costs and long-term repair expenses. California Civil Code 5600 requires the Board to budget in such a way that the Association has sufficient funds, this includes operating and savings for long term reserve component repairs. It has always been my philosophy that funding the reserves adequately and increasing 3-5% every year will keep an Association financially stable.

Budget preparation starts six-seven months before the fiscal year-end with the annual reserve study.

Every three years the reserve study is done with an on-site inspection of the reserve components. The two years in between require a financial review and adjustment to the component funding balances based on any reserve expenditure that occurred in the previous year and upcoming projects. Reserve components are based on a 30-year life expectancy. As communities age, additional components can be added. For example - after 20-30 years concrete can start to deteriorate, and the cost may increase to the point that it's not viable to pay from the operating account as the expense may be variable year to year. It would be better to have reserves funds available to make the repairs as necessary. Other items that might be considered are termite treatment, termite tenting over a 10-year period, tree trimming or replacement, etc. Accurate reserve studies depend on clear and effective communication between the management team, Board and reserve specialists.

Budget drafting begins approximately four to five months before the fiscal year end. Documentation used to prepare the budget draft is the reserve study report, a general ledger report of the previous twelve months of expenses and known contract expenses for example, landscaping, insurance premiums, CPA annual review contract costs, and utility expenses. Contacting contractors to confirm any changes in their contracts, checking with the Association insurance agent for any possible increase in the annual premiums is another way to document any recommended increase.

The priority when adjusting the draft budget is ensuring the reserve study recommendations. Generally, the recommended amount funded towards each component will depend on the component's life expectancy, how soon that component will need to be repaired/replaced and the percent funded of the overall reserve funds. Once the reserve budget is established, the operating budget can be adjusted based on the review of the operating expenses of the previous year and known contract prices. During the preparation,

review of the prior year's expenses compared to the actual current year's budget allows adjustments to be made where the expenses may have increased or decreased. I also look for those one-time expenses made in the last twelve months that won't need to be budgeted for the upcoming fiscal year. As a Community Manager it is my responsibility to know and understand the needs of each Association and be able to present a realistic budget to the Board of Directors.

As a Community Manager, I can say that one of the uphill battles I do contend with every year is at least one or two Boards that won't see the reasoning in raising assessments to meet the needs of their community. While the Manager may recommend the relevant increases, the final decision always rests with the Board, and the manager supports and implements the Board's decision.

The budget draft spreadsheet and supporting documents are typically sent to the Board three weeks before the scheduled budget meeting. This allows the Board Members time to review the budget more thoroughly than just at the meeting. Questions can be answered in advance of the meeting so a comprehensive discussion can be held at the Board meeting. Having the draft budget spreadsheet as a working document at the meeting, adjustments can be made in real time allowing the Board to see the outcome of the budget changes and increase in assessments, if and as necessary.

Although the community manager drafts the budget, it is ultimately a collaborative effort between the manager and the Board of Directors. The Board has the final decision-making responsibility, but it is the manager's responsibility to provide a realistic draft for the Board to make an educated decision for the corporation and the owners of the Association.

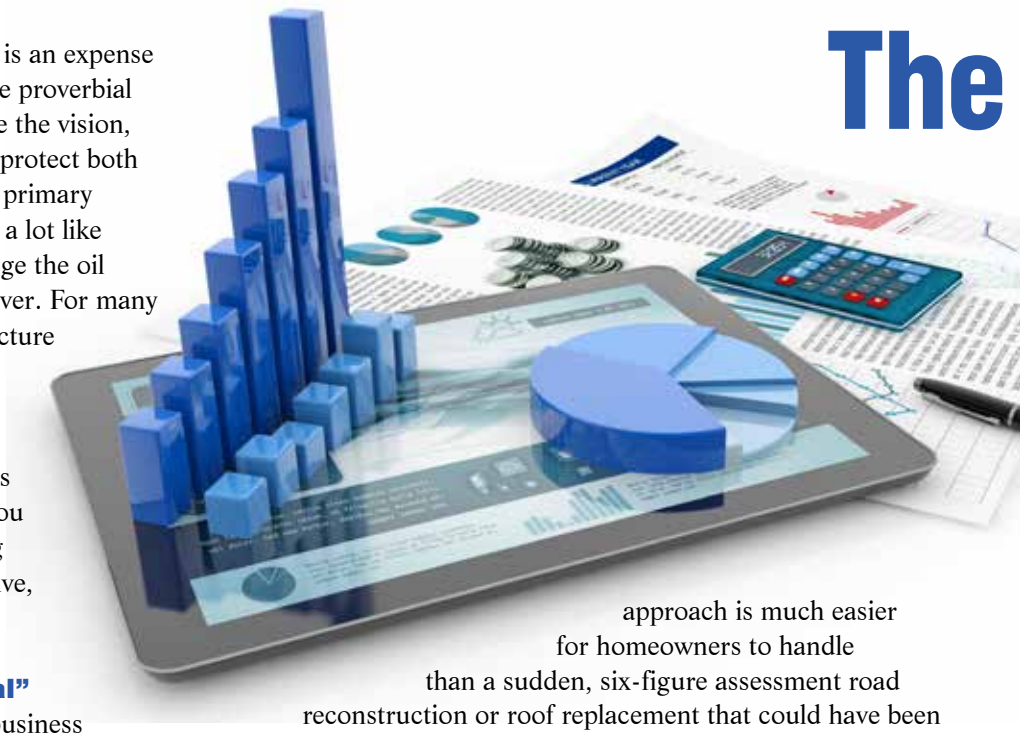
Increases in assessments are never a popular decision, but not having the funds to maintain, protect and enhance the Association can be even more unpopular.

When assessments are not increased and the bills cannot be paid, roofs cannot be repaired, landscaping cannot be maintained, or other expected maintenance of the common area cannot be kept up to anticipated standards, there can be a loss of curb appeal in the community which can lead to lower property values and pride in community homes.

As the manager presenting the budget to the Board, I want to emphasize that although I may not live in the community, I do have a vested interest in its success. I care about the condition of the property, how well it is maintained, and the overall financial health of the Association. These factors reflect not only on management, but also on the commitment and leadership of the Board of Directors. I take great pride in the communities I work with and strive to support each Board to the best of my ability. My goal is to guide and educate board members throughout the budgeting process so they can make informed decisions that benefit their community both now and in the future.

Danita L. Vaughn *has been in the community association industry since 1988, and is owner of Concord Consulting & Association Services, a full-service association management company. Danita earned the PCAM designation in July 2006 and has earned the CMCA and AMS designations. Danita has been a member of the Channel Islands Chapter of CAI serving on several committees over the years, served as Chapter President in 2014, and on the Board of Directors from 2009-2014. Danita can be reached at danitav@concordconsulting.net.*

The



For many homeowners, a Reserve Study is an expense endured for the sake of compliance. The proverbial check the box task. Little do they realize the vision, planning, and power it provides the Board to protect both the association's assets and the homeowners' primary investment. Managing an older community is a lot like maintaining a vintage car; you can't just change the oil once every five years and expect it to run forever. For many Homeowners Associations (HOAs), infrastructure like plumbing, roofs, and roadways follows a "ticking clock". It's predictable, but if you aren't paying attention, it's also dangerous. While it's tempting to treat a Reserve Study as a document you file away until the law says you have to look at it again, the reality of an aging neighborhood demands a shift toward proactive, annual planning.

The Real Cost of "Business as Usual"

The biggest hurdle most Boards face is the "business as usual" mindset. Ignoring the early signs of infrastructure decay doesn't just push the problem down the road; it actually makes the eventual repairs exponentially more expensive. Think of it as compounding interest, but in the wrong direction. By committing to an annual update cycle, your Board can manage the "deterioration rate" of assets, ensuring the community stays sustainable and financially transparent.

The most compelling reason to do this is the fiscal health of the association. As communities age, the cost of fixing years of wear and tear can become overwhelming very quickly if your fund is based on outdated projections.

Updating annually allows the Board to:

- Adjust for Inflation: You need to ensure your "realistic projections" for future costs are keeping pace with what materials and labor actually cost in today's market.
- Track Rapid Changes: This helps you catch the exact moment a component shifts from "gradual wear" to "accelerated decline".
- Update the Components List: As laws change and the community ages, you can update the list to address the actual assets for which the association is responsible that may have been invisible in the past.

Avoiding the "Special Assessment" Trap

Nobody wants to be the board member who has to deliver the news of a massive special assessment. Underfunding is a dangerous condition that often leads to "sticker shock" when a community realizes they can't afford a major project. By updating the study every year, you can implement incremental increases in funding. This gradual approach is much easier for homeowners to handle than a sudden, six-figure assessment road reconstruction or roof replacement that could have been predicted years ago.

This isn't just about avoiding pain; it's about building value. Responsible reserve funding is directly rewarded with higher property values. A well-maintained community signals to buyers and savvy investors that the association is structurally sound and financially stable. Conversely, visible deferred maintenance can hurt resale values. It's also worth noting that lenders pay close attention to reserves, which can directly impact an owner's ability to sell their home.

A Living Document: Changing the Component List

There is a common misconception that a Reserve Study is a static list of assets. In reality, the study must evolve to remain accurate. A study for a five-year-old community looks nothing like one for a thirty-year-old community.

When a community is new, the focus can often be on cosmetic items like paint and carpet. But as you hit that thirty-year mark, the focus has to pivot to high-risk, critical infrastructure like aging plumbing, foundations, and structural elements.

This is where Board input becomes vital. Components can be added or changed as the community's needs shift. For example:

- Concrete and Trees: A new community might think concrete lasts forever, but as trees grow, their roots can wreak havoc on sidewalks, creating trip hazards. Annual updates allows planning for these ongoing repairs before they become a liability.
- Termites and Maintenance: Aging wood-framed community may find this is a recurring necessity that needs to be funded.

Case for Annual Reserve Study Updates

By Una Hart
Association Reserves

Navigating New Laws and Expert Insights

The legal landscape is also constantly shifting. For instance, California SB 326 now requires inspections of balconies and elevated walkways every nine years. Additionally, AB 1572 places restrictions on using potable water for irrigation, which can significantly impact landscaped common spaces. Annual updates ensure you aren't caught off guard by these changing mandates.

Managing an aging property is complex, and it really requires a multidisciplinary approach. By staying on an annual cycle, the Board can maintain in contact with experts:

- Structural Engineers: They provide the technical insights into the actual condition of your assets.
- Reserve Study Providers: They help keep your funding strategies and cost projections current.
- Specialized Contractors: They can offer a reality check on whether a component needs a simple maintenance fix or a full, expensive replacement.

Selling the "Why" to Your Neighbors

The hardest part of any board member's job is gaining homeowner buy-in for increased funding. The best way to break the "us vs. them" cycle is through transparent, annual communication. You have to remind residents that the community belongs to everyone—it's "our" money and "our" home.

Annual updates give you the perfect opportunity to use visual aids—like the graphs provided by your Reserve Study firm—to show deterioration rates and the long-term cost of doing nothing. When homeowners see the data and realize that proactive planning actually reduces the likelihood of an emergency assessment, they are much more likely to support a realistic funding plan.

The Path Forward

Managing infrastructure is one of the biggest challenges you'll face on a Board, but it's also an opportunity to secure the future of your neighborhood. Annual Reserve Study updates are the roadmap you need to navigate that complexity. By prioritizing critical repairs and staying committed to transparent funding, you can stop the cycle of deferred maintenance. Proactive planning ensures your community remains safe, functional, and financially stable for the next generation of residents.

***Una Hart** is an experienced Reserve Specialist who has completed more than 2,200 Reserve Studies for community associations in California, Nevada, Hawaii, and internationally. She joined Association Reserves in 2017 and brings extensive expertise in reserve planning, construction, and building systems. Una can be reached at uhart@reservestudy.com.*

Congratulations to our 2025

High Notes & HIGH STAKES AWARDS GALA

The Chapter hosted its Annual Awards Gala on Friday, February 4. Thank you to all the chapter members who joined us for this celebratory evening featuring networking, entertainment, and recognizing our chapter award nominees and winners.

Diane Doria "Volunteer of the Year" Award

Anna Vargas
FOUREST TREE CARE & LANDSCAPE

Program of the Year Award

Program: "Scary Good Legal Advice for HOA Nightmares"
presented by
Lisa Tashjian, Esq., CCAL
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and
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Company Spotlight Award - Management Company Category

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Company Spotlight Award - Business Partner Category

EmpireWorks Reconstruction & Painting

Chapter Spirit Award

Valerie Franklin
EMPIREWORKS
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Chapter Award Winners!

Committee of the Year Award

Luncheon Programs Committee
Co-chaired by
Chelsi Rueter, CMCA, AMS, PCAM
COMMUNITY PROPERTY MANAGEMENT
and Carrie Simmons, CMCA, AMS
PMP MANAGEMENT

Distinguished Service Award

Ruth Campbell, CCAM-PM, CMCA
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Excellence in Community Association Leadership Award

Frank Jauregui, CCAM, CMCA
THE MANAGEMENT TRUST

Rising Star Award

Erin Blake
ACCURATE TERMITE & PEST CONTROL

Michelle Underwood, CMCA, AMS, PCAM
SMARTSTREET-BANC OF CA

William S. Dunlevy, Esq. "Author of the Year" Award

Ryan Gesell, CIRMS, CMCA
CLINE AGENCY INSURANCE AGENCY

President's Award

Chelsi Rueter, CMCA, AMS, PCAM
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CHANNEL ISLANDS
CHAPTER

Proactive Maintenance

The Key to Extending the Life of Aging Communities

Business Partner members share their tips on proactive maintenance!

Proactive Steps HOAs can Take to Preserve & Extend the Life of their Assets

Jimmy Day, *ALLBRiGHT Painting & Construction*

Aging communities can significantly extend the lifespan of their buildings and common areas by focusing on preventative maintenance and early intervention. Small, unaddressed issues often become costly repairs, so a proactive approach can significantly affect both long-term costs and property value.

HOAs should consider implementing the following as part of their routine:

Regular Building Inspections
I recommend conducting routine visual inspections of exterior surfaces, balconies, decks, railings and waterproofing systems to identify early signs of deterioration like cracks, wood rot, rust, or water intrusion.

Protective Coatings & Repainting Cycles
Maintaining a consistent repainting schedule helps protect stucco, wood and metal from UV exposure, moisture and environmental wear. Quality coatings act as a protective barrier, preventing premature deterioration.

Waterproofing & Sealing
Deck coatings, balcony waterproofing, window and door sealants and flashing should be monitored and maintained regularly to prevent water intrusion, which is one of the most common causes of structural damage in aging buildings.

Address Repairs Early & Avoid Deferred Maintenance
When minor wood rot, stucco cracks, failing sealants, or damaged metal components are identified, addressing them quickly can prevent widespread deterioration and reduce repair costs.

Plan Using Reserve Studies & Inspections
Align maintenance and repair projects with reserve studies and inspection reports such as SB326 balcony inspections. Planning ahead allows associations to budget properly and avoid emergency repairs.

By investing in preventative maintenance and partnering with experienced vendors, HOAs can protect their assets, maintain property values and ensure their communities remain safe and attractive for years to come.

Jimmy Day is a Solutionist and Painting Happiness Specialist with ALLBRiGHT Painting & Construction, a Southern California contractor specializing in Residential and HOA repainting, waterproofing, deck systems, concrete coating, and carpentry wood repairs. Jimmy works closely with community managers and HOA boards to develop proactive maintenance plans that help preserve building assets, reduce long-term costs, and extend the life of community infrastructure. Jimmy can be reached at jimmy@allbrightpainting.com.

Roof Maintenance Tips for HOAs

Dan Schwee, *August Roofing*

Replace Damaged Tiles Promptly

Broken or aging roof tiles should be replaced as soon as they're identified to prevent water intrusion and further damage.

Manage Debris Regularly

Clearing leaves, branches, and other debris helps reduce fire risk and ensures water drains properly during rain.

Maintain Proper Ventilation

Adequate attic ventilation helps control moisture buildup, improves energy efficiency, and reduces the risk of mold and premature roof deterioration.

Inspect Flashing and Roof Penetrations

Regularly check areas around vents, chimneys, and soffits to ensure flashing is intact and sealed to help prevent leaks.

Schedule Periodic Roof Cleaning

Professional roof cleaning can remove moss, algae, and debris that may trap moisture and shorten the lifespan of roofing materials.

Consider Home Hardening Measures

Exterior improvements such as ember-resistant vents and fire-resistant materials can help increase a community's resilience to wildfires.

Dan Schwee is the Director of Sales at August Roofing where they provide professional roof maintenance services to ensure every roof is safe, resilient, and built to last. Dan can be reached at dans@augustroofing.com

How to Help Preserve the Life of Trees and Landscapes

Shawna Faith Urena,
Enhanced Landscape Management

In our aging landscapes where trees and plants are well established, proper care becomes even more important. Taking too much foliage from an established tree or shrub can cause unwanted stress and even death to older specimens. Just like people, the old and the young are more susceptible to diseases, weather, and environmental factors. You can improve preservation of your plants and trees by proper trimming and care practices, improving soil health and updating irrigation. Depending on a plant or tree's lifespan, as plants decline and die off you can remove and replace them with updated plant selections that are drought tolerant and more disease resistant.

We recommend communities create approved plant lists, so they have a list of agreed upon plant material and tree selections. As plants do die off there is then a plan in place for the future. This helps to keep communities growing and moving forward consciously and maintaining their beauty. Risk assessments should be done in aging trees to keep communities as safe as possible. Removing declining limbs and deadwood can help trees focus on viable growth, helping with their preservation and allows trees to age gracefully while reducing liability concerns.

Shawna Faith Urena is a certified tree risk assessor for Enhanced Arbor Management / Enhanced Landscape Management. She has been in the horticulture and arboriculture business for close to 30 years and takes pride in educating communities so they can make proper tree care choices. Shawna can be reached at surena@enhancedlandscape.com.

For business partners specializing in the HOA industry, visit **cai-channelislands.org/directory/categories** or scan QR code

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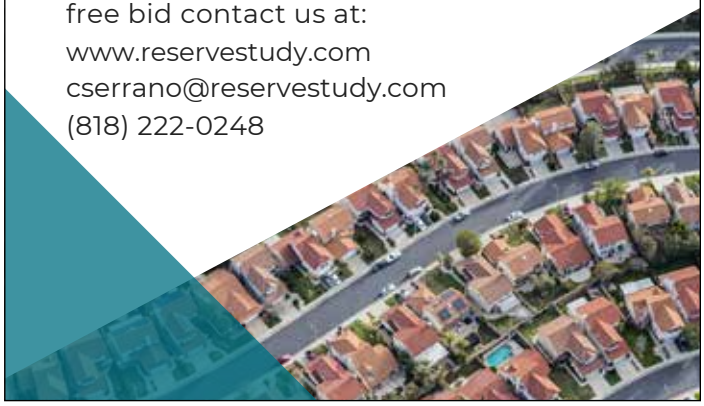

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A Proactive Pest and Termite Management Plan

Chris Colley, *Payne Pest Management*

As communities age, proactive pest and termite management plays an important role in protecting the long-term integrity of buildings and shared property. Wood-destroying organisms like termites, along with rodents and other pests, can quietly cause structural damage that becomes costly if left unchecked.

A proactive pest management program allows communities to detect problems early, reduce long-term repair costs, and ultimately extend the life of their buildings and infrastructure.

A few proactive steps HOAs can take include:

- Schedule annual termite inspections to detect activity early before structural damage occurs.
- Implement preventative termite treatments when needed, particularly in older buildings where wood structures are more vulnerable.
- Maintain proper landscaping and irrigation practices since excess moisture around foundations can attract termites and other pests.
- Establish a regular pest control maintenance program to manage common pests before populations grow.
- Educate residents and maintenance staff on early warning signs such as mud tubes, droppings, or wood damage.

Chris Colley is a sales rep with Payne Pest Management, a family owned and operated pest and termite control company serving Southern California since 2006. Chris can be reached at ccolley@paynepestmgmt.com.

For business partners specializing in the HOA industry, visit **cai-channelislands.org/directory/categories** or scan QR code

Proactive Steps to Preserve and Extend the Life of HOA Assets

Teresa Agnew

As communities age, proactive maintenance and early inspections are essential to preserving structural integrity and preventing costly repairs. A strategic approach to maintaining the building envelope—the systems that protect the structure from the elements—can significantly extend the life of community assets and reduce the likelihood of unexpected capital expenditures.

Here are Top 5 Maintenance Tips for Aging HOA Communities:

Schedule Regular Exterior Inspections

Conduct routine inspections of balconies, decks, siding, waterproofing systems, and other structural components to identify early signs of deterioration. A general exterior review should occur annually, with more comprehensive building envelope evaluations recommended every 3–5 years.

Prioritize Preventative Maintenance

Addressing minor issues such as failed sealants, flashing deficiencies, or localized wood deterioration can prevent water intrusion and structural damage. Sealants, flashing, and exposed exterior elements should typically be evaluated and maintained **eve**ry 3–5 years, depending on weather exposure.

Maintain the Building Envelope and Roof Systems

Proper maintenance of siding systems, waterproofing, windows, roof systems, and roof-to-wall transitions helps prevent moisture intrusion—the leading cause of long-term structural deterioration. Establishing an annual roof maintenance plan allows associations to identify minor issues early and extend the life of roofing systems.

Budget for Preventative Inspections and Maintenance

When preparing annual budgets, HOAs should include a dedicated line item for preventative inspections and maintenance evaluations. Routine assessments allow boards to address issues early, support reserve planning, and ensure warranties remain in place.

Plan for Capital Improvements

Partnering with experienced contractors and reserve specialists allows boards to develop long-term repair strategies that align with reserve studies and minimize unexpected costs. Additionally, exterior elevated element inspections required under California law must be revisited every 9 years following the initial inspection cycle.

Scheduling regular preventative maintenance and inspections not only protects structural assets but also helps maintain manufacturer and contractor warranties. A proactive approach allows boards to extend the lifespan of building components while protecting property values and resident safety.

Teresa Agnew has over 20 years of experience in the HOA industry and currently serves on the Chapter's Board of Directors and as a Committee Chair for the Chapter's Community Faires.

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The Board Debates
but Deferred Maintena

By Jim Sattler
Design Build Associates

The Board recognizes that a long-deferred project must finally be addressed. In many communities, deferred maintenance is not the result of neglect, but of good intentions colliding with limited information, competing priorities, and concern over homeowner reaction. Past Boards may have postponed action due to funding constraints, reluctance to engage homeowners, or the perceived complexity of managing a construction project. Over time, these delays become normalized, repairs are discussed year after year, budgets are balanced by deferring work, and the condition of the property quietly continues to decline.

Deferred maintenance rarely announces itself dramatically. It shows up as recurring paint touch-ups instead of full surface preparation, temporary roof patches instead of targeted repairs, isolated wood replacement where widespread deterioration exists, or repeated garage or balcony "band-aids" rather than addressing moisture intrusion. Initially, these decisions may appear reasonable and cost-conscious. The problem is that deferred maintenance rarely stays static—it compounds.

Questions naturally arise: Can the repairs be funded through reserves? Is a modest assessment increase sufficient? With so many unknowns, discussions often circle without resolution. At this point, a well-intentioned Board member typically concludes, "We won't know what this will cost until we get bids," and the Community Manager is instructed to obtain them. While common, this approach is frequently misguided. It often leads to a prolonged and uncertain process, producing bid numbers that lack context and offer little value for informed decision-making.

What often goes unrecognized is how quickly deferrals can snowball into major expenses. A leaking deck coating

nce Can't Wait

that could have been repaired and resealed several years ago may now require full removal and replacement of the waterproofing system, damaged framing repairs, and interior remediation. A paint project delayed too long can allow substrate failure—turning what should have been routine maintenance into extensive carpentry, dry rot repair, or siding replacement. The Board did not "save" money by waiting; the scope simply grew larger, more disruptive, and more expensive.

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Questions to Ask Before Seeking Bids

- ☐ Is the proposed repair truly necessary, or are there alternative solutions or materials that offer better long-term value?
- ☐ Is the HOA responsible for the work, or could it fall under a construction defect or warranty claim?
- ☐ What secondary impacts might the project have (for example, effects on landscaping due to painting, scaffolding, or wood repairs)?
- ☐ What are the life cycles of the materials being replaced and adjacent components, and should related work be bundled to minimize repeated disruption?
- ☐ How do warranties—both current and future—factor into material and scope decisions?
- ☐ What does the reserve study indicate regarding timing, funding, and related components approaching the end of their useful life?
- ☐ What materials are appropriate, considering durability, maintenance requirements, availability, aesthetics, and installation restrictions?
- ☐ Are permits required, and what level of plans or specifications will be necessary to obtain them?
- ☐ How will a clear, unbiased scope of work be developed to ensure true "apples-to-apples" bidding?
- ☐ Who will prequalify contractors and verify insurance, financial capacity, experience, and licensing?
- ☐ How will the project be funded—through reserves, assessments, loans, or a combination—and what legal considerations apply?
- ☐ Will homeowner meetings be needed to explain the scope, costs, and benefits of the project?

Continued on page 20

This is where the early involvement of an experienced construction manager becomes critical. A qualified construction manager can guide the Board through a structured process, ensuring that key issues are identified and addressed in the proper sequence. Without this guidance, bids are frequently based on incomplete or inconsistent assumptions, resulting in wide price variations, confusion, and frustration.

These questions directly affect reserve studies, special assessments, and homeowner satisfaction. When maintenance is deferred, reserve assumptions often become inaccurate, funding gaps widen, and Boards are forced into reactive decisions. Special assessments that feel sudden or avoidable erode homeowner trust, even when the Board is acting responsibly.

> **Conversely, Boards that demonstrate a clear process—supported by professional guidance—tend to build confidence, even when difficult financial decisions are required.**

This list is not exhaustive, but it underscores an essential point: the process the Board follows is as important as the construction itself. A methodical, well-defined process enables informed decision-making, reduces surprises, and helps prevent small problems from becoming major crises. Some questions must be answered before others, and understanding this sequence is key to keeping projects—and costs—under control.

Most Boards lack the construction expertise required to develop and manage this process independently. Directing the Community Manager to "get bids" bypasses critical steps and often results in bid discrepancies, change orders, cost overruns, disputes, and in some cases, construction defects. Many of these outcomes are avoidable with proper planning and professional oversight. Community Managers play an essential administrative and coordination role; however, a professional construction manager possesses the specialized construction knowledge, experience, and skill set required to make the appropriate project decisions.

This is the essence of effective project management. Engaging professionals provides the expertise, structure, and leadership needed to guide the project to a successful outcome while protecting the Board and the Association. Just as importantly, it helps Boards act before deferred maintenance escalates beyond control—by identifying priorities, sequencing work, aligning reserve planning, and communicating clearly with homeowners.

When a Board hesitates due to cost, it is worth considering the opposite perspective: the Association may not be able to afford not to hire a construction manager. Beyond cost savings, professional management helps shift technical decision-making and associated liability to a qualified expert. A well-planned process often saves more than the construction manager's fee—while safeguarding the HOA's assets, financial stability, and long-term homeowner satisfaction.

Jim Sattler *is President of Design Build Associates and has over 35 years of construction industry experience in a variety of Operational and Finance capacities and led his own General Contracting company. Jim can be reached at jimsattler@dbuild.com.*

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2026 California Bills CAI-CLAC is Watching for Community Associations

By Robert M. DeNichilo, CCAL
Founder of DeNichilo Law, APC, and CLAC Legislative Co-Chair

Legislative Update Disclaimer: Legislative text, bill status, and advocacy positions can change throughout the legislative session. All content should be reviewed against current legislative status before reliance.

As the 2026 California legislative session continues, CAI-CLAC is tracking several bills that could affect the day-to-day operations of community associations across the state. The current proposals touch on several core areas for boards and managers, including governance, reserve funding, elections, owner discipline, utilities, and energy-related improvements.

For board members and community managers, the practical issues are familiar: how associations fund major repairs, conduct elections, enforce rules, and respond to changing state policy. Several of this year's bills would directly affect those responsibilities if enacted.

Below is a summary of the key bills CAI-CLAC has identified as priorities, along with CLAC's current positions.

Assembly Bills

AB 1184 (Patterson)

AB 1184 addresses association management and meeting procedures. The bill covers several topics, including rule amendments and meeting minute requirements, but the most impactful aspect of the bill would prohibit a majority of directors from using a series of communications of any kind, directly or through intermediaries, to discuss, deliberate on, or take action on association business within the board's authority, except in an emergency, while still permitting certain informational and ministerial communications. **CAI-CLAC is neutral** on the bill at this stage and continues to monitor it.

AB 1684 (Ward)

AB 1684 concerns cooling systems in common interest developments. It would render unenforceable any governing document, architectural guideline, or policy that restricts or prohibits the installation, upgrade, replacement, or use of cooling systems, subject to limited exceptions. The bill would also expose associations to liability for actual damages and civil penalties of up to $2,000 for willful violations. **CAI-CLAC opposes the bill unless amended.**

AB 1892 (Davies)

AB 1892 would clarify when an association is responsible for restoring interrupted gas, heat, water, or electrical service if the interruption originates in the common area, unless the governing documents provide otherwise. The bill also addresses several election related issues as it would revise election procedures by addressing notice requirements for electronic voting and shortening the notice period for elections by acclamation. **CAI-CLAC supports the measure.**

AB 2035 (Dixon)

For qualifying senior housing developments, AB 2035 would lower the approval threshold for court approved CC&Rs amendments from more than **50 percent** of the membership to more than **37 percent,** provided specified conditions are met, including that the declaration has not been amended for at least **35 years. CAI-CLAC is neutral** on the bill.

AB 2050 (Caloza)

AB 2050 focuses on reserve funding. As written, beginning **January 1, 2032,** reserve studies would be required to identify the minimum annual contribution needed to ensure reserve balances do not fall below zero over a **30-year** period. Associations would then be required to fund reserves at or above that level annually, with special assessment procedures applying if statutory limits are exceeded. **CAI-CLAC supports** the bill.

AB 2579 (Petrie-Norris)

AB 2579 attempts to address some of the issues caused by 2025's AB 130 and would restore greater flexibility in addressing serious violations that cannot be managed effectively through a limited fine structure, and the required opportunity to cure. This bill would expand exceptions to the fine cap for violations affecting health or safety and clarify the scope of the cure exemption. **CAI-CLAC supports** the bill.

Senate Bills

SB 222 (Wiener)

SB 222 addresses residential heat pump water heaters and HVAC systems. It would void and render unenforceable any governing document provision that restricts or prohibits the replacement of gas appliances with electric appliances, including heat pump systems. **CAI-CLAC opposes this bill.**

SB 1007 (Menjivar)

In what perhaps is the most dangerous bill coming from Sacramento relating to community associations, SB 1007 would require member approval for regular assessment increases exceeding inflation. This will almost certainly lead to additional deferred maintenance and significant special assessments in the future.

SB 1007 would also impose new requirements for annual budget reports. Among other things, it would require broader disclosures describing what regular assessments fund and details surrounding management company compensation and would restrict assessment increases if those disclosures are not provided. **CAI-CLAC opposes the bill unless amended.**

SB 1238 (Wahab)

SB 1238 proposes broader changes related to association management. It would revise the definitions of "agent" and "management services," expand disclosure obligations to prospective purchasers, restrict the use of reserve funds for certain legal matters, and impose additional fiduciary and operational requirements. **CAI-CLAC opposes the bill.**

Practical Implications

CAI-CLAC's 2026 priority bills present a mixed picture for community associations. Some measures would clarify responsibilities, strengthen reserve planning, or restore important enforcement tools. Others would limit association discretion, expand disclosure requirements, or reduce flexibility in areas traditionally managed by boards and community managers.

For now, the most practical course is to stay informed. Boards and managers should continue to monitor these bills closely and be prepared to update policies, budgeting practices, and operational procedures if any of them are enacted.

Robert M. DeNichilo *is Founder and Shareholder of DeNichilo Law, APC. He has over thirty years of legal experience and focuses his practice exclusively on the representation of community associations throughout California as corporate counsel. Mr. DeNichilo currently serves as Legislative Co-chair for CAI-California Legislative Action Committee (CLAC) and can be reached at robert@dlawapc.com.*

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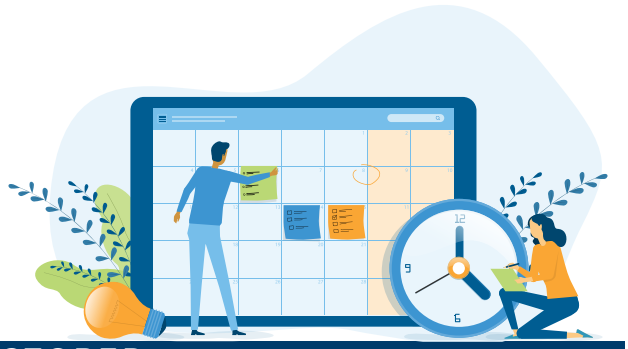

APRIL

30 **Community Faire,** 3:30 pm, Westlake Village

MAY

14 **Chapter Webinar,** 11 am, Zoom

28 **Ventura County Chapter Luncheon**
Serra Center, Camarillo

JUNE

3-6 **CAI Annual Conference,** Florida

18 **Central Coast Luncheon,** 11:30 am, Pismo Beach

30 **Reverse Trade Show,** Spanish Hills Club, Camarillo

JULY

— No Chapter Events —

AUGUST

13 **Chapter Webinar,** 11 am, Zoom

20 **Santa Barbara Luncheon,** 11:30 am
Mar Monte Hotel, Santa Barbara

25 **Ventura County Chapter Luncheon,** 11:15 am
Hyatt Regency, Westlake Village

SEPTEMBER

10 **Bingo, Boots, & Brews,** 5:30 pm
Camarillo Ranch, Camarillo

17 **Central Coast Luncheon,** 11:30 am, Pismo Beach

29 **Community Faire,** 3:30 pm,
Spanish Hills Club, Camarillo

OCTOBER

6, 13, & 20 Board Leadership Webinar Series
10 am, Zoom

27 **Ventura County Chapter Luncheon,** 11:15 am
Hyatt Regency, Westlake Village

NOVEMBER

5 **Santa Barbara Luncheon,** 11:30 am
Mar Monte Hotel, Santa Barbara

12 **Central Coast Luncheon,** 11:30 am, Pismo Beach

17 **Ventura County Chapter Luncheon,** 11:15 am
Hyatt Regency, Westlake Village

DECEMBER

3 **Holiday Happy Hour,** 5-7 pm, Westlake Village

10 **Ventura County Chapter Luncheon,** 11:15 am
Spanish Hills Club, Camarillo

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The California Legislative Action Committee (CLAC) is a volunteer committee of Community Associations Institute (CAI), consisting of homeowners and professionals serving homeowner associations (HOAs).

CAI is the largest organization in America dedicated to the monitoring of legislation, educating elected state lawmakers and protecting the interests of those living in community associations.

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2026 Schedule of Events

APRIL

30 **Community Faire**
3:30 pm, Westlake Village

MAY

14 **Chapter Webinar**
11 am, Zoom

28 **Ventura County Chapter Luncheon**
Serra Center, Camarillo

JUNE

3-6 **CAI Annual Conference**
Fort Lauderdale, Florida

18 **Central Coast Luncheon**
11:30 am, Pismo Beach

30 **Reverse Trade Show**
Spanish Hills Club, Camarillo

cai-channelislands.org

CAI-Channel Islands Chapter Luncheon

FAIR HOUSING COMPLIANCE
Avoiding Costly Mistakes

THURSDAY **MAY 28** 11:15 AM | SERRA CENTER 5205 UPLAND RD CAMARILLO

cai CHANNEL ISLANDS CHAPTER

A Practical Guide to Accommodations, Assistance Animals & Accessibility

Key Takeaways:

- Understanding your obligations under federal and state law
- Documentation strategies that protect the association
- How to properly evaluate and respond to requests
- When a request becomes unreasonable
- Real-life scenarios and best practices

MORE INFORMATION AND TO REGISTER
cai-channelislands.org