3 WAYS YOU CAN AVOID UNPRODUCTIVE BOARD MEETINGS

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ENGAGE. EDUCATE. EMPOWER.

Greeting Fellow Chapter Members,

I am very honored and excited to serve as President of the Houston Chapter for Community Association Institute in 2019.

In May, I attended the CAI Annual Conference in Washington DC. The conference was inspiring and educational. I enjoyed meeting many dedicated community volunteers and leaders from around the country and received three days of valuable training at the Volunteer Leadership Workshop. Next year’s Annual Conference is in Orlando, Florida from May 15 to 18. I highly recommend attending the Annual Conference to all members.

My vision for the Houston Chapter is to ENGAGE, EDUCATE, AND EMPOWER community managers, board members, community volunteer leaders, and business partners alike. CAI offers tremendous resources and support to help community associations build safe, peaceful, and dynamic neighborhoods. We want to share CAI’s message with as many communities as possible.

ENGAGE. I encourage the Chapter Board, committees, managers, and business partners to Engage current and new members. There are many opportunities to connect with existing members and enlist new members. Every month, CAI hosts unique and fun events to network, reconnect, and sharpen our industry skills. In July, over 300 members attended Take a Manager to Lunch. Many thanks to Cynthia Burns and the entire TAMTL Committee for their hard work planning and coordinating such a beautifully catered and wonder event enjoyed by all.

Earlier this year, The Fun Committee hosted a crawfish boil and Octoberfest where many Chapter members enjoyed connecting on a social level. And, as previously mentioned, the Gala in January will be an amazing event. The 15 Chapter Committees govern, plan, coordinate, and promote events and are essential to the affairs of the Chapter. If you are not already serving on a Committee, please consider joining one this year — we would love to have you!

EDUCATE. Before serving on the Board, I chaired the Education Committee for several years, so this aspect of the Chapter’s purpose is near and dear to me. The mission of the Greater Houston Chapter is to be a source of education and information which advocates the use of best practices, professionalism, and integrity in order to promote responsible community associations and those who serve them. Consistent with that mission, the Chapter hosts multiple educational opportunities. In coordination with CAI National, the Chapter promotes CAI’s Professional Management Development Program. This is an opportunity for community managers to increase their skills and knowledge while gaining valuable designations. In addition, the Education Committee plans and presents several education seminars throughout the year. These seminars focus on industry specific topics as well as subjects of interest for our region. For example, in the wake of Hurricane Harvey, Frank Billingsley and Jeff Lindner spoke to our Chapter about weather patterns and the Harris County Flood Control District’s response to flooding. Also, Paul Gruczka and

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TERA THERIOT
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“Engage, Educate & Empower”
Rob Felix spoke about board management and reserves. Education credits are provided to managers, but Board members and business partners also benefit from staying current on industry trends. Please make plans to join us at our next monthly luncheon!

EMPOWER. CAI exists to EMPOWER effective leadership, promote best practices, and foster healthy communities. The Chapter provides resources, education, and support to all members, empowering them to serve their communities professionally with confidence. My desire is to see all CAI members take advantage of available resources promoting the power and passion they need to fulfill their potential as managers, board members, and business partners!

Finally, as you may have heard, our 2018 Chapter President, Carey Kelly, recently accepted a position in South Carolina, nearer to his hometown and family. We appreciate Carey’s leadership and dedication to the Chapter this past year and wish him the very best with his new position. Thanks, Carey!

Thank you for allowing me to serve the Chapter this year. Please join me as we ENGAGE, EDUCATE, AND EMPOWER our members.

Jonathan H. Clark is a partner with the law firm of Hoover Slovacek LLP, a long-time Chapter Premium Partner. He represents master planned communities, single family neighborhoods, townhomes, communities, and condominiums. Jonathan strives to provide correct and practical legal and strategic counsel to community managers, board members, and volunteers to help empower them to build safe, peaceful, and dynamic communities. Before serving on the Chapter Board of Directors, he chaired the Education Committee for several years. With the help of several talented and dedicated committee member volunteers, the Education Committee doubled the average attendance at monthly luncheons.

2019 Premium Partners

GOLD
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Daughtry & Farine, P.C.
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The Playwell Group
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Tuttle Construction
Union Bank Homeowners Association Services
VanMor Properties, Inc.
As we begin a new year, many of us make resolutions. We’re going to lose weight, get in shape, become a better person. Yet studies have shown that less than 25% of people stay committed to their resolutions after just 30 days, and only 8% accomplish them.

When I consider the Houston Chapter, there are of course, a few resolutions I’d like to see. But I’m always overcome by the amount of dedicated volunteers we have assisting in the chapter’s success. We have over 15 active committees, averaging 12 members. Committees are made up of managers and business partners alike, working towards a common goal. Along the way, amongst the budget discussions, ideas for sponsorships and innovative ways to increase attendance relationships are born. These relationships can turn into long-term—or even lifetime—friendships. And it goes without saying that being friends with someone is more than being just an employee, or customer, or business associate. With friendship comes trust, fun, and lots more. By building business relationships, you will have more friends, and you will get more value from them, just as they will from you. Throughout it all, our committees grow stronger, our events become better and the chapter grows.

If you haven’t found the right committee for you, let’s visit. I’m sure we can find the right spot to get you engaged in the chapter.

I have a new addition to our Houston Chapter office, I’d like to introduce you to Qiana Taylor. Qiana joins us as our Office and Membership Coordinator. I am excited to introduce Qiana to all of you, if you haven’t had a chance to say hello, please take a moment to introduce yourself. Qiana looks forward to meeting you.

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### 2019 Calendar of Events

**MARCH 21-22, 2019 | 9:00 AM—5:00 PM**  
Professional Management Development Program M-206  
Financial Management  
Houston Hilton Westchase  
9999 Westheimer Houston, Texas  77042  
Learn how to best manage your association’s money.

This course gives you the tools to understand and apply the principles of financial management to your community. Meet and Greet to follow sponsored by Yellowstone Landscape.

**MARCH 30, 2019 | 8:00 AM—1:00 PM**  
Community Outreach — Trash Bash  
Little White Oak 310 North Street, Houston, Texas  77009  
Sponsored by: AAA Plumbers, CertaPro Painters, Daughtry & Farine, P.C., Earthcare Management, Inc., First National Bank of Kemp, Houston Community Management Services, AAMC and Native Land Design

Every year, thousands of volunteers gather along Texas waterways to do their part in cleaning up the environment by participating in the largest, single-day waterway cleanup in the state of Texas, the River, Lakes, and Bays "N Bayous Trash Bash".

**APRIL 5, 2019 | 9:00 AM—5:00 PM**  
Professional Manager Development Program M-202  
Association Communications  
Houston Hilton Westchase  
9999 Westheimer Houston, Texas  77042  
Learn key communication techniques to improve resident and board relations.  
This course offers communication strategies that will benefit both new and experienced managers and provide the skills to better understand owners and volunteers.  
Meet and Greet to follow sponsored by Cox CPA Services, Inc.

**APRIL 13, 2019 | 9:00 AM—4:00 PM**  
Board Leadership Development Workshop  
Memorial Club Townhouses  
1211 Country Place, Houston, Texas  77079  
The CAI Board Leadership Development Workshop teaches you how to communicate with association residents, hire qualified managers and service providers, develop enforceable rules, interpret governing documents and more. It provides a comprehensive look at the roles and responsibilities of community association leaders and conveys information to help create and maintain the kind of community people want to call home.

**APRIL 23, 2019 | 1:00 PM—3:30 PM**  
The Cadillac Bar Sponsorship Event  
1802 Shepherd Drive, Houston, Texas  77007  
At the Sponsorship Event and Auction you can see a clearly laid out “menu” of all of your sponsorship opportunities to grow your business. You can make plans well ahead of time for the events you want to go for, as well as make plans well in advance for the event once you win it.

There will be small ticket items all the way up to the premium level sponsorships available. Secure additional exposure by committing in advance. This format gives the chapter an opportunity to get your name out in advance of the event.

Do away with the last minute phone calls from a committee member in a high pressure situation looking for sponsorship dollars. Everything will be settled at the end of the auction.

**SEPTEMBER 11-14, 2019**  
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Serving on a board of directors can be eerily similar to a marriage. Some conversations you’re 100% in agreement. While other conversations you’re thinking boxing gloves sure would come in handy. Discussions can be respectful and mature, while others deteriorate into “why would you think selecting that landscaper was a good idea” or “how on Earth did you think not washing a plate before putting it in the dishwasher makes any sense?” Landscapers and dirty dishes notwithstanding, conducting a productive board meeting can be as challenging as playing Pictionary with your spouse.

In order to succeed and accomplish the objectives of a board meeting, rather than berate your better half for their first grade drawing ability, there are three issues that board members should contemplate to assist with increasing the productivity of a board meeting.

1. Focus on the agenda items/goals of the meeting

A board member should always review the agenda prior to the board meeting. Reviewing the agenda will allow board members to familiarize themselves with the topics to be discussed; thereby, facilitating more efficient and productive discussions as opposed to coming into a meeting cold. Additionally, board members should think about the goals of the meeting. What business needs to be handled at the meeting? It is imperative that board members stay on task. Board members should strive not to deviate from the agenda. Deviating from the agenda often results in “getting into the weeds”. All of a sudden, a discussion

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3 WAYS
YOU CAN AVOID UNPRODUCTIVE BOARD MEETINGS

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about a potential pool contractor deteriorates into an argument regarding an incident involving an incompetent lifeguard that occurred five years ago. Stay focused! By not staying focused on the task at hand, what should have been a 30-minute meeting can easily turn into a three-hour meeting.

2 Remember the purpose of a board meeting is to conduct business

The heading above speaks for itself. The purpose of a board meeting is to allow the board to discuss, consider, vote, etc. on community association-related business. While homeowner input can be helpful, it is important for boards to avoid having owner comments/interaction interfere with and/or disrupt the meeting. A board meeting is not an open dialogue between the board and the homeowners. Decisions are ultimately made by the board, not the homeowners. Accordingly, the board is not required to entertain comments/opinions from homeowners in attendance if said input is not requested. That being said, the manner in which the board communicates this information to the homeowners should be done respectfully and professionally. Also permitting a short period of time either before the meeting is called to order or immediately after the meeting might work for your community and is better than member input during the meeting when minutes are being taken.

3 Keep an open mind

Board members should be encouraged to attend a meeting with an open mind. Often times, board members arrive at a meeting with a strong point of view on a topic. As a result of having preconceived opinions, board members become unwilling to actually listen and consider a competing point of view. Being respectful is important. Board members come from all walks of life; consequently, they will undeniably have conflicting opinions on different topics. Diversity of opinion should be embraced, not shunned. Positives and negatives of competing points of view should be discussed and analyzed prior to making a decision. Decisions made by the board should be based on what is best for the association, not what is best for a board member, owner, etc.

If board members keep these three simple issues in mind when attending a meeting, the smoothness, efficiency and productivity of future meetings will increase. Reducing the time spent on unproductive meetings will allow boards to avoid unnecessary stress and focus on more important things...like finding a better drawing Pictionary partner.

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Eric Tonsul is a shareholder in the firm’s Real Estate section as a leader of the Community Association Team. His practice includes representation of land developers, community associations, condominium associations and other common interest communities. Eric graduated from South Texas College of law in 2000.
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Deep in the Heart of Texas

Community Associations Institute leaders of Texas recognize our business partners play a pivotal role in the health of each chapter and recognize those business partners who have membership in all four Lone Star Chapters.

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Business Partner Exchange
Plans and executes the “Reverse Trade Show”
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Business Partner Networking
Coordinates business partner networking events
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Community Outreach & Enrichment
Applies the Chapters’ community outreach strategy
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Kerry@playwellgroup.com

Board Liaison: Dana Ladd, CMCA
Houston Community Management Services
832-864-1200
danall@hcoomm.com

Premium Partners
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Crest Management Company, Inc. AAMC
281-579-0761
carolyn@crest-management.com

SUSAN VANDAGRIF, CMCA, AMS, PCAM (CO-CHAIR)
VanMor Properties, Inc.
832-593-7300
susan@vanmor.com

Sponsorship Auction
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Sienna Plantation Associations
281-778-3739
deidra@clubsienna.com

Board Liaison: Michael Barrera
Mckenna Contracting Inc. and Classic Sports LLC.
832-459-2205
michael@mckennaccontracting.net

Take a Manager to Lunch
Plans and executes the Chapter’s manager networking event
CYNTHIA BURNS, CMCA
Mutual of Omaha Bank, CondoCerts
832-445-5787
cynthia.burns@cabanc.com

Board Liaison: Michael Barrera
Mckenna Contracting Inc. and Classic Sports LLC.
832-459-2205
michael@mckennaccontracting.net

Trade Show
Plans and executes the Annual Trade Show
DARLENE TREAT
Sweetwater Pools, Inc.
281-988-8480
darlene@sweetwaterpoolsinc.com

KELLY MCNABB AYLESWORTH
WaterLogic
713 - 878-9574
kelly@waterlogic-texas.com

Board Liaison: Amy Newsom
Live Oak Construction
713-991-2667
amy@liveoakconstruction.com

There’s a spot for you GET ENGAGED!
Contact the Committee Chair, or call the chapter office directly at 713-784-5462
Many homeowners’ associations require an annual audit or review to be performed every year. However, a lot of people do not know that there is a difference between these two reports.

What is the difference between an audited financial statement and a reviewed financial statement? The answer is easy – it’s the report that the CPA attaches to the financial statements. The work that is performed by the CPA in order to attach each report is where the confusion lies.

If the CPA issues reviewed financial statements, the report that the CPA attaches provides “negative assurance” about the set of financial statements. Negative assurance means the CPA is saying they didn’t find anything significantly wrong with the financial statements. The work that is done in order to say that mainly involves analytics. Analytics are procedures such as comparing actual current year numbers to actual prior year numbers and explaining significant differences and comparing current year budgeted numbers to current year actual numbers and explaining significant differences. Analytics also involve asking about or obtaining bank reconciliations, assessments receivable reports, information on large delinquent balances, prepaid assessments reports and accounts payable lists. The auditor does not recalculate the balances in order to ensure they are correct, instead they rely on the fact that everything “looks good.” In addition, the auditor would read the minutes and obtain a management representation letter from the board of directors and manager.

If the CPA issues audited financial statements, the report that the CPA attaches provides an opinion that says the financial statements are “fairly presented.” Saying that the numbers are fairly presented means that the numbers are accurate, within a certain scope or dollar amount. It does not mean that every number is exactly correct. The work that is done in order to say the numbers are fairly presented is all the work listed above in order to issue reviewed financial statements, plus: checking the bank reconciliations, assessments receivable reports, the large/old delinquent balances, prepaid assessments reports and the accounts payable lists. The auditor also tests a sample of expenses by looking at paid vendor
What is the difference between an audited financial statement and a reviewed financial statement? The answer is easy—It’s the report that the CPA attaches to the financial statements.

Invoices. For an audit, the balances for each of these accounts would be recalculated to ensure that they are reasonably accurate. In addition, if the financial statements are being audited, the auditor is required to ask various people such as the manager and board members about any knowledge of fraud. The auditor is also required to document the accounting policies and procedures. There is also a large number of checklists and forms to be completed when conducting an audit that are not required when conducting a review.

To check the bank reconciliations, the auditor would make sure the bank balance listed on the bank reconciliation matches the bank statement, see if large outstanding checks clear in the next month and make sure the balance on the bank reconciliation matches the balance sheet. To check the assessments receivable report and prepaid assessments report, the auditor would make sure the balance on the list(s) matches the balance sheet and analyze old/large delinquent balances to see if they are collectible. To check the accounts payable listing, the auditor would look at disbursements and corresponding vendor invoices in the new year to see what year the purchase actually happened in.

How do you know if the Association’s financial statements should be reviewed or audited? First, check the bylaws. Quite a few bylaws state the requirement. If the bylaws don’t address what type of service to purchase, check the Texas rules. Or, if the Association has a bank loan, ask the bank what their requirements are. Lastly, now that you know the difference, ask the board if they want negative assurance or if they want an opinion on their financial statements.

Teresa Cox has been practicing public accounting for 26 years. She graduated from Indiana University and enjoys living in Houston with her husband Joel and dogs, Lucas, Rio and Hannah. Teresa was previously the audit partner for a local firm, Anneken & Moser in the Cincinnati area where she developed her homeowner association niche by auditing these associations for 15 years.

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• hsmith@cavalryconstruction.com
During my tenure in the community association industry, I have touched in one way or another probably over 6,000 director and officer (“D&O”) liability claims. I have sat back and thought at length what, if any, commonality there is between and amongst these claims. I have come to these conclusions and I presume that there are other community association professionals that would come up with more:

- Proposed Unit Buyer’s do not do their due diligence/homework before moving into a community association. This due diligence is critical for a Unit Buyer to understand what it means to buy into a community association, and the cost benefit analysis of what they are giving up versus what they are gaining. Once you buy in, your home is still your castle, but subject to the covenants, conditions and restriction you agreed to by signing your deed, and the rules and regulations of the association. “Ignorance of what you have agreed to is not a defense!” I cease to be surprised that many Unit Buyers do not have time to do their due diligence, but they have time to fight and litigate matters for years causing the association and its insurers to incur significant amounts.

- The second commonality is that many volunteer board members are very often the same Unit Buyers who did not do their due diligence. As a result, often their motivation for joining the board was to fight what they after the fact believe is not fair, or to try and change things that are in their self-interest as opposed to the best interest of the community association that is a foundation to the board member’s fiduciary obligation.

- Finally, the volunteer board members often do not understand their role as a board member. This item will be an article in and of itself. At a minimum, there should be a requirement that a prospective board member should declare that they have read the governing documents and have asked any questions they may have to clarify their duties and obligations. Additionally, boards should have a mandatory annual board training. Many managements do this, but just as many, if not more do not. This can be done by their management company, local attorneys or one of the many CAI offerings you can get on line or attend a course that CAI may make available.

A number of years ago, my daughter and son-in-law thought about buying a condo. They presumed I would not recommend that they buy a condo. I surprised them by indicating that I had no problem with a condo. However, they must do their due diligence first! Their presumption was based on the many stories I shared with them over the years regarding association and unit owner problems, disputes and challenges, stories I could not make up. I believe, however, that 95% or more community associations in fact operate fine with minimal issues. I attribute this to my participation in CAI all around the country which exposes me to the good and not just the bad and ugly.

My daughter and son-in-law, the teaching coach and the engineer, asked me what due diligence I would recommend. The Condominium Unit Buyer’s Check List was the product of that question. The check list is equally applicable, but not limited...
to Cooperative Housing Corporations, Single Family HOAs, Commercial Condominiums, Townhomes and Timeshares. As a result of my daughter and son-in-law conducting their due diligence, they did not buy the condo. Specifically, the realtor and the unit owner at the eleventh hour submitted a supplemental disclosure statement indicating that the tile flooring in the kitchen and the hardwood floors were installed on the second floor unit without board approval. The board would not grandfather this in, nor would the unit owner pay to have it remediated. I am curious whether the supplemental disclosure statement would have been submitted had they not pursued their due diligence.

It is my humble opinion that if 75% of Unit Buyers were to do a substantial amount of this due diligence, the potential problems and challenges would be significantly reduced. I further believe that if association boards and managers were to be asked these questions on a regular basis, this would have a very positive impact on the associations risk management. Accordingly, the Condominium Unit Buyer’s Check List is just as valuable to the association and its board. On the one hand, the check list will weed out prospective Unit Buyers who do not fit in a common interest development, and on the other hand it can act as an audit check list for the association.
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32 TBLS Board Certified® Property Owners Association Law Attorneys statewide, 7 at RMWBH

Rick Butler
Marc Markel
Clayton Hearn
Brady Ortego
Sipra Boyd
Clint Brown
Cliff Davis
Rahila Sultanali
Jane Janecek

Is your attorney board certified?

*Statistics courtesy of State Bar of Texas Membership: Attorney Statistical Profile (2018-2019) and Texas Board of Legal Specializations Active Certifications of Special Competence by Area by Year

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## Condominium Unit Buyer’s CHECK LIST

**By Joel W. Meskin, Esq., CIRMS – Managing Director Community Association Products**  
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<table>
<thead>
<tr>
<th>Item</th>
<th>Research (Ignorance is not Bliss or a defense)</th>
<th>Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>BY-LAWS</strong> - Obtain a copy of the condo association by-laws - the association’s operating manual (who has authority to do what, who is a member, who is eligible to vote, and how to elect board members)</td>
<td></td>
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<tr>
<td>2</td>
<td><strong>CC&amp;Rs</strong> - Obtain a copy of the CC&amp;Rs (declarations/conditions, covenants &amp; conditions) - the association rules (what can you put on your door, how loud can music be, who can live in the unit, can you have pets, etc.)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td><strong>DELINQUENT ASSESSMENTS</strong> – How many association unit owners are more than 30 days delinquent in paying assessments? What percentage of those delinquencies are more than 60 days past due. (If unit members are delinquent, someone has to cover the shortfall - the remaining current members.) Any Foreclosure sales?</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td><strong>PENDING LAWSUITS AGAINST THE ASSOCIATION</strong> - Are there any lawsuits or administrative proceedings (i.e. EEOC or fair housing) pending against the association? If not, have there been any lawsuits in the past 5 years? (Do a civil index check in the county court)</td>
<td></td>
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<tr>
<td>5</td>
<td><strong>PENDING LAWSUITS AGAINST UNIT OWNERS</strong> - Does the association have any lawsuits pending against any unit owners or vendors?</td>
<td></td>
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<tr>
<td>6</td>
<td><strong>RESERVE STUDY</strong> - Does the association have a Reserve Study? If no, why not?</td>
<td></td>
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<tr>
<td>7</td>
<td><strong>FUNDED RESERVE STUDY</strong> - If the association has a reserve study, is it funded, and if so, what percentage is it funded?</td>
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<tr>
<td>8</td>
<td><strong>RESERVE STUDY UPDATE</strong> – When was the reserve study last updated?</td>
<td></td>
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<tr>
<td>9</td>
<td><strong>CAPITAL IMPROVEMENTS</strong> - Does the association have any substantial capital improvements or repairs planned within the next 24 months and if so how is it going to be funded (reserves, special assessment, loan)?</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td><strong>SPECIAL ASSESSMENTS</strong> - Does the association currently have any special assessments, other than the normal monthly dues/assessments? If not, are there any special assessments planned in the next 24 months?</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td><strong>INSURANCE</strong> - Who is the insurer for the condo association master policy providing property coverage for the building and providing coverage for the general liability coverage? Who is the agent for the association? (is he or she a Community Insurance Risk Management Specialist?)</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td><strong>APPRAISAL</strong> - When was the last time an appraisal was done to determine the appropriate amount to insure the condo association property? What was the appraised value?</td>
<td></td>
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<tr>
<td>13</td>
<td><strong>UMBRELLA INSURANCE</strong> - Does the association have an umbrella liability policy and if so, what are the limits? Does the umbrella policy provide follow form directors and officer’s coverage?</td>
<td></td>
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<tr>
<td>Question</td>
<td>Details</td>
<td></td>
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<td>----------</td>
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<tr>
<td>** DIRECTORS &amp; OFFICERS INSURANCE**</td>
<td>Who is the insurer for the directors and officers’ liability insurance? Does the association have Cyber Liability/Data Breach Coverage?</td>
<td></td>
</tr>
<tr>
<td>** EMPLOYEE DISHONESTY/CRIME INSURANCE**</td>
<td>Does the association have a fidelity (employee dishonesty)/crime policy and if so, what are the limits? Does the limit equal at least the total of all operating accounts, reserve accounts and 3 months of assessments? Does the Crime policy have Social Engineering Coverage?</td>
<td></td>
</tr>
<tr>
<td>** EMPLOYEES**</td>
<td>Does the association have any of its own employees? If yes, does the association have Workers Compensation Insurance? If so, does the association have an employee manual?</td>
<td></td>
</tr>
<tr>
<td>** PROPERTY MANAGER**</td>
<td>Does the association use an independent property or community manager? If so, what is the name of the management company and who is the key contact? If so, is the manager on site or is it a portfolio manager?</td>
<td></td>
</tr>
<tr>
<td><strong>PROPERTY MANAGER INDEMNIFICATION</strong></td>
<td>If there is an independent management company is there a written management agreement. If there is a written management agreement, is there a mutual indemnification provision or just a unilateral provision running in favor of the management company.</td>
<td></td>
</tr>
<tr>
<td><strong>PROPERTY MANAGER ERRORS &amp; OMISSIONS</strong></td>
<td>If there is an independent management company, does it have its own errors and omissions policy?</td>
<td></td>
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<tr>
<td><strong>PROPERTY MANAGER FIDELITY/CRIME INSURANCE</strong></td>
<td>If there is an independent management company handling the association's funds, does it have a fidelity crime policy? Does the association have Cyber Liability/Data Breach Coverage?</td>
<td></td>
</tr>
<tr>
<td><strong>ASSOCIATION FINANCIALS</strong></td>
<td>Does the association have audited financials? If yes, obtain a copy of the most current audited financials. If not, does an independent accountant handle the finances? If not, who handles the finances?</td>
<td></td>
</tr>
<tr>
<td><strong>POSITIVE FUND BALANCE</strong></td>
<td>Does the association's current balance sheet show a positive fund balance? If there is a negative fund balance, what is the explanation?</td>
<td></td>
</tr>
<tr>
<td><strong>COLLECTIONS</strong></td>
<td>Who handles the association's collections? Association? Attorney? Manager?</td>
<td></td>
</tr>
<tr>
<td><strong>GENERAL COUNSEL</strong></td>
<td>Does the association have general counsel? If so, who?</td>
<td></td>
</tr>
<tr>
<td><strong>ELECTIONS</strong></td>
<td>Has there been a challenge to the board election within the last 24 months?</td>
<td></td>
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<tr>
<td><strong>DEVELOPER</strong></td>
<td>Is the developer on the board and/or control the board?</td>
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</table>

**MISCELLANEOUS NOTES:**
Questions or concerns about your Homeowners Association?

You're not alone! We know you're busy, that's why Community Associations Institute (CAI) has launched your free HOA Hotline. Homeowners living in condominiums, townhomes and subdivision community associations across Texas and have questions about the routine operations of their Community Associations can take advantage of this free resource available to the public.

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GREATER HOUSTON CAI CHAPTER

2019 Gala Award Winners

The Greater Houston CAI Chapter held its Gala on Friday, January 11. We thank everyone for their attendance and the Gala Committee for all the hard work that went into planning this event.

The following are the award winners:

Community of the Year
CATEGORY II
Teal Run Maintenance Association, Inc.

Community of the Year
CATEGORY III/IV
Spring Trails Community Association, Inc.

High Rise Category
The Houstonian Estates

CAI Chapter Volunteer of the Year
Chris Archambault, Daughtry & Farine, P.C.

Community Association Volunteer of the Year
Jim Adams, Fairwood HOA, Inc.

Community Spirit Award
Giving Tree Lighting Ceremony
Sienna Plantation Associations

Business Partner of the Year
Texas Landscape Group, LP

Manager of the Year
Cindy Boje, Crest Management Inc., AAMC

Management Company of the Year
CATEGORY I/II
KRJ Management, Inc.

Management Company of the Year
CATEGORY III
C. I.A. Services, Inc.

Congratulations
to all the award winners!

Presented by:

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The first thing you may want to do is prepare yourself and family for a lengthy 30 days period to complete your Case Study. Let friends and family know just how important this process is for your professional career so that they can provide you with love and support. It will take commitment and dedication from everyone to get you through this process. Most PCAM Candidates work a full time job as a Manager while taking on the task of achieving this great accomplishment. The regular day-to-day of being a Manager along with ensuring your family life is given your attention is challenging without the Case Study looming ahead. It’s an arduous task to say the least but you will get through it.

In preparing yourself for what’s ahead, it’s important to reflect on your past studies, refresh yourself by reviewing Professional Management Develop Program M-200’s. Have your books pulled out of storage and ready to use if necessary. Since candidates are not aware of what type of community they will be given as part of the Case Study, be sure that you have the familiarity of all types of communities that you may potentially be given. Once it is time to begin writing your paper you will not want to use that valuable time to brush up on the differences of condominiums, townhouses or single family communities. This is most important for those who only manage certain types of communities and do not have a portfolio that has allowed them to manage these various types.

Prepare a list of possible resources that you may utilize when writing your paper. Be sure to connect with those resources in advance if they will be available to assist in answering general questions that would help you to develop your responses. Remember you may not ask a PCAM for assistance, therefore other industry related resources may be necessary and used for general questions and not specific to the property you are assigned to.
TRY YOUR BEST NOT TO SECOND GUESS WHAT YOU HAVE PREPARED AND IF AT ALL POSSIBLE, DON’T WAIT UNTIL THE VERY LAST MINUTES TO TURN IN YOUR CASE STUDY.

Remember to read and reread your paperwork prior to sending in your Case Study. Have your spouse or partner read the document as well; while they may not be familiar with the industry, that additional review may catch grammatical errors or bring up questions that you may not have thought of and would be helpful in your paper. Follow all of the instructions provided to you by your instructor and triple check to ensure you have met all of the requirements outlined for the course.

Try your best not to second guess what you have prepared and if at all possible, don’t wait until the very last minutes to turn in your Case Study. Finally, make a copy for your personal records (it’s an interesting read years later).

Once you’ve earned that high honor of PCAM, you will see that all your hard work was worth it. We look forward to celebrating your success with you.

Sharlene has over 22 years of community association management experience with various types of communities including single-family, town-homes and condominiums. Her background includes management of a large master planned community in Sugar Land, Texas and running one of the largest Branch operations of a National Management Company and currently serves as the General Manager for the largest town-home community in the City of Houston.

Sharlene specializes in large-scale residential developments, developer controlled communities, and management of multi-million dollar budgets. Her skills include policy and procedure development, effective cost management and team development. She prides herself on her ability to communicate effectively and encourages her clients on what positive aspects that open communication can bring to their communities.
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<thead>
<tr>
<th>NAME (first, middle and last)</th>
<th>TITLE</th>
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<tbody>
<tr>
<td>ASSOCIATION / COMPANY</td>
<td>BUSINESS TYPE</td>
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<td>ADDRESS</td>
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<td>PHONE HOME</td>
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<td>EMAIL</td>
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**Greater Houston Chapter (GHC-CAI)**

**SELECT YOUR CHAPTER**

**RECRUITER NAME (IF APPLICABLE)**

**TOTAL MEMBERSHIP DUES:**

<table>
<thead>
<tr>
<th>Community Association Leaders &amp; Homeowners</th>
<th>Managers</th>
<th>Management Companies</th>
<th>Business Partners</th>
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<tbody>
<tr>
<td>Individual Board Member or Homeowner</td>
<td>$132</td>
<td>$425</td>
<td>$580</td>
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<tr>
<td>2 Member Board</td>
<td></td>
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<tr>
<td>3-15 Member Board</td>
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**CAI membership dues above include Mandatory Advocacy Support Fee.**

**PAYMENT:** once completed, submit your application and payment

<table>
<thead>
<tr>
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<th>Phone: (888) 224-4321</th>
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</thead>
<tbody>
<tr>
<td>Mail: CAI, P.O. Box 34793, Alexandria, VA 22334-0793</td>
<td>Fax: (240) 524-2424</td>
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2019
Greater Houston Chapter Community Associations Institute

The Education Committee for the Greater Houston Chapter of Community Associations Institute is planning another great year of educational seminars for 2019. We believe the best way to ensure a vibrant platform is to seek ideas, input and feedback from our Members. To that end, the Committee is asking for suggestions for topics, speakers or presenters for 2019.

All presenters should be dynamic, experienced speakers who are comfortable in front of a large group and capable of engaging their audience. The topics should be relevant to our industry, focusing on emerging trends and issues frequently encountered in managing or administering a community association. Please note that this local chapter has budgetary restraints which the Committee has to take into consideration.

If you would like to submit a proposal for a presentation, or if you would like to suggest a speaker or a topic, please complete the attached form and return to the Houston CAI Office at stephanie@caihouston.org. The committee will review all submissions and select those which, in the Committee’s opinion, will best serve our Members.

You can also complete the form at www.caihouston.org.

| Name of Presenter: __________________________ |
| Topic: __________________________ |
| Applicability to industry: __________________________ |
| Have you given this presentation previously? | |

Please provide a reference: __________________________
If so, when: __________________________
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Is this course approved by CAM-ICB for CE Credits? Yes/No
Length of presentation: __________________________

Description of presentation, in 75 words or less:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
SPRING PLUMBING TIPS
TIPS FOR TRANSITIONING YOUR IRRIGATION SYSTEM FROM WINTER TO SPRING.

Make sure to visually inspect and review the components of the system to ensure that it works properly when the water is turned back on.

2. Make sure all your valves are closed.
If you drained your system before winter many of these valves will still be open. You can quickly do this as you make your visual inspection.

3. Check your sprinkler heads.
Inspect and clean each filter by removing the cap from the sprinkler head and taking out the filter. You can clean the filter by wiping off any sediments and swishing it around in a container of water to clean any additional debris.

4. Slowly turn the main water valve back on.
Turning the water valve on slow and easy is key. The pressure of the water moves at a high rate and you don’t want to cause any damage to your system. Listen as the water flows and then visually inspect your system for any leaks.

5. Bonus Tip:
Consider installing a smart Wi-Fi capable sprinkler controller to optimize water usage.

Additional Tips:
While checking your irrigation system, make sure to check your backflow preventer for your pool as well!

Clear all storm drains from fall and winter debris.

Check your water bill for the possibility of receiving a credit for water toward your sprinkler usage versus sewer drain usage.

Make sure to call your plumber with any backflow preventer related issues.

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MAINTENANCE & PREVENTATIVE MAINTENANCE ARE THANKFUL JOBS

Getting a community to run smoothly and keep its curb appeal is something that the manager will need to work with the maintenance staff or contractors to accomplish. Keeping up with the day-to-day tasks of making needed repairs and/or improvements is a challenging one – especially if your community is an aging one.

Whether you have a large community and use work orders or a small community and only use task lists, it is important to stay on top of the things that need to be done. If you do not have a good way of tracking the list of what needs to be done, then the staff (and you) can easily become overwhelmed.

So, how can you stay on top of the to do list? If you research the subject, you will find that most experts recommend pretty much the same thing – such as:

- As the Manager, walk the property daily. If you cannot, then have your Maintenance Supervisor do so. In doing so, you and your staff will be able to see things in the same light as your residents do.

- If you notice something wrong or notice that something is wearing and needs attention, place a work order or add it to your task list.

- Once you return to your desk, sit down and prioritize the things that you have found need attention. There should be three separate areas.

  – Priority Requests – ones that are obvious and may affect a resident’s safety or well-being. Are there trip hazards that could lead to a severe fall? Are there lights out? Does the lake at the beautiful entrance area have green “scum” in it? Is the grass dying in the common area because of a non-working irrigation...
system – causing the entrance or greenbelt areas to be brown and non-appealing?

- Regular Work Requests – This type of requests encompasses minor repairs to the building, furniture or outside landscaping. Dead plants can make the outside common areas unattractive and need to be replaced as quickly as possible. The same goes for dirty carpeting or bathrooms. These items should be address quickly.

- Preventive Maintenance Request – while not a “priority” request will extend the life of the community’s major systems and/or equipment. Make sure your maintenance staff performs the required preventive maintenance on equipment and air conditioners. Changing of air conditioning filters may seem to be a small thing, but it can really harm your equipment if it is not done. Save the owner’s operation manual and create a monthly schedule of the equipment that needs to be serviced. Double check to make sure that the time frame is being followed.

• Last, but not least, take a look at your reserve study report. See where your equipment and infrastructure is in the “lifespan” of the equipment. Advise your Board of Directors when you notice that something is getting close to needing to be replaced.

• Plan for the replacement (and budget for) items that will need to be replaced in the near future. Your residents and Board will be thankful for your diligence in protecting their assets and amenities.

Following a management career in Florida that included entrepreneurship and corporate management, Jeanne began her career with First Colony Community Association in 2006 when she moved to Sienna Plantation. She earned her CMCA designation in 2008, her AMS designation in 2014 and having finished all 200 courses, is currently working on her volunteer hours leading to the PCAM designation.

www.caihouston.org
CONGRATULATIONS

RealManage Houston obtains their AAMC in 2018

The following managers received their CMCA in 2018:

Randie Capps
Chaparral Management Company, Inc., AAMC
Michelle Deck
RealManage, AAMC
Angela Douglas
C.I.A. Services, Inc.
Kelly Force
Kaila Gattis
C.I.A. Services, Inc.
Erica Herbert
High Sierra Management, Inc., AAMC
Ashley Howard
PMG Houston – Houston
Dana Ippoliti
Sienna Plantation Associations
Christina Kelley
INFRAMARK, AAMC
Douglas McGee
Sienna Plantation Associations
Melinda Pimentel
Cortiers LLC
dba Aggieland Houses
Erin Rapp
Rapp Management Company, Inc., AAMC
Megan Rinehart
PMG Houston – Houston
Amy Roberts
Memorial Parkway Community Association
Angela Swindle
C.K.M. Property Management, Inc.

The following managers received the AMS in 2018:

Amanda Cox
Associa
Eric Feller
Bentwater (POA)
Brooke Gattis
C.I.A. Services, Inc.
Debra Gravett
Sterling Association Services, Inc.
Alejandro Haiek
Manager Firm Incorporated
Daniel Harris
Crest Management Company, Inc., AAMC
Amy Hoechstetter
Meyerland Community Improvement Association
Melissa Martin
PMG Houston – Houston
Courtney Maughan
PMG Houston – Houston
Margaret McKay
Houston Community Management Services, AAMC
Dana Mohler
Crest Management Company, Inc., AAMC
Ayodele Roberts
Sienna Plantation Associations
Amy Roberts
Memorial Parkway Community Association
Jessica Smith
CCMC

Receiving the RS: Elon Goldman, Association Reserves, Texas
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