

Channels of Communication

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

FIRST QUARTER 2015

The Official Publication of
CHANNEL ISLANDS CHAPTER
community
ASSOCIATIONS INSTITUTE

Spring Cleaning Check-List

- Annual Disclosures
- Review Governing Documents
- Survey the HOA including Common Areas
- Review Insurance Coverage with Provider
- Attend Educational Programs to stay informed!

IN THIS ISSUE...

Your Community's Spring
Cleaning Check-List

Spring Into Action! Turning
Resolutions into Results

Cost Effective Landscape
Solutions For the Spring
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president's message



Sue Bartley
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Dear Valued Members,

What a great time of the year it is especially here in Southern California. Yes, we are in a drought but that does not mean community appearance has to suffer. Let's think a **Fresh Start for Spring** and make our communities really shine!

Sharing in the efforts to help improve the Community such as organizing a volunteer Spring Clean Up Day or recruiting a committee of volunteers for trash pick up can make such a difference in a Community. Possibly offer refreshments afterwards to encourage neighbors to get to know each other.

Helping a neighbor can go a long way in a Community. Post a notice in your newsletter or on the bulletin board asking if anyone wants to sign up to receive help cleaning exclusive use areas like patios for those that may not have time or ability to do so. You may even enlist the help of local groups like a Boy Scouts / Girl Scouts Troop who might be looking to earn community service hours.

A community wide garage sale is another great way to have neighbors working together and will encourage owners to clean out the garage and start fresh. Coordinate with a local organization such as Good-Will or The Rescue Mission to pick up unsold items afterwards. By encouraging residents to clear space and park in the garage, your Community can greatly reduce parking congestion and make the Community look more open and inviting.

Let's do something different and let Spring be a time to refresh, renew and be grateful for all Southern California living has to offer.

Lastly, I want to say thank you to all of our members. You care about the community you live in as you attend chapter events, asking intelligent questions to make your quality of living better for those you share common roads and common walls with!

I look forward to seeing you at an upcoming Chapter Event.

Best,

Sue Bartley

Sue Bartley
CAI-Channel Islands Chapter President



YOUR COMMUNITY'S SPRING CLEANING CHECK-LIST

*By Cari Ann Potts, Esq.
Myers, Widders, Gibson, Jones & Feingold, LLP*

Spring brings with it the opportunity to straighten up any association business that tends to fall to the wayside as the year progresses. It is the perfect time to not only ensure compliance with all those pesky statutory disclosure requirements, but also to take care of some good old housekeeping issues. We have compiled a checklist of spring-cleaning steps and suggestions for getting your association “in shape” and ready for the rest of the year.

ANNUAL DISCLOSURES

As you likely know, 30 to 60 days prior to the end of its fiscal year, an association must make certain annual disclosures to its members. Depending on the particular association's fiscal year, this time of the year is ideal for drawing up an association's annual budgetary and policy disclosure statements. As required by the Davis-Stirling Common Interest Development Act (the "Act"), an association must:

- ✓ Distribute an annual budget report, including a pro forma operating budget, summaries of the association's reserves and reserve funding plan, statements concerning the possibility of repairs, special assessments, summaries of outstanding association loans and the association's insurance policies, among other things. The full list of requirements for the annual budget report is laid out in Civil Code section 5300.
- ✓ Distribute an annual policy statement, which must designate the individual selected to receive official communications to the association, notify the member of his or her right to receive general notices by individual delivery and of his or her right to receive copies of meeting minutes, among a number of other things. The full list of requirements for the annual policy statement is laid out in Civil Code section 5310.
- ✓ Review its governing documents to determine if the association must disclose items not specifically required in the Act.
- ✓ Ensure that the required annual statements are properly delivered to each member pursuant to Civil Code section 5320.

EDUCATE YOUR BOARD

While the terms of each association's board of directors differ, spring presents an association with the opportunity to make sure its board of directors is fully educated about its roles and responsibilities. We suggest the directors:

- ✓ Review the governing documents, including the declaration of covenants, conditions, and restrictions (the "CC&Rs"), bylaws, and any rules and regulations.
- ✓ If not already done, review all new statutory and case law affecting associations. Our firm provides a comprehensive seminar covering the most important new legislation and case law affecting homeowners associations. Other firms and organizations do the same.
- ✓ Review the Act's open meeting requirements. It is important that a director is aware of to whom he can speak about association business and when, and which subjects are appropriate for closed meetings as opposed to open meetings.
- ✓ Review the Act's and/or the association's dispute resolution requirements. New directors are often not aware that associations have prescribed grievance procedures. Educating those directors before a dispute arises pays dividends when a sticky situation does present itself.

SURVEY THE PROPERTY

In preparation for drafting the annual budget and the budget-related disclosures, an association should survey its common area property. (See Civ. Code, § 5300, requiring an association to disclose what association property, if any, must be repaired or replaced.) To do so:

- ✓ Walk around the association's property. Survey the building walls and roofing structures, landscaping and hardscaping, parks common area buildings (such as recreation and meeting centers), and asphalt for items in need of repair or replacement.
- ✓ Review association records to determine the life of the roofing system(s) and asphalt. If the lifespan is coming to an end, obtain estimates for the cost of repair or replacement.
- ✓ Review association records to determine if complaints have been registered concerning common area property. View any property which has been called out in a complaint, and obtain estimates for repair or replacement as needed.

REVIEW THE GOVERNING DOCUMENTS

It is well-known that statutory and case law affecting associations is constantly in flux. Before you know it, your association governing documents have become stale, or even legally noncompliant. Noncompliant governing documents can lead to the use of improper or unlawful procedures, which may, in turn, render the association susceptible to a lawsuit. To ensure the association's governing documents are up to snuff:

- ✓ Review recent case and statutory law.
- ✓ Review the association's governing documents, including the CC&Rs, bylaws, and rules and regulations or policies and procedures, keeping in mind the Act's requirements and recent case law.
- ✓ Note whether any portions of the governing documents conflict with the Act or case law.
- ✓ Alternatively, contact the attorney for your association and coordinate a consultation to discuss review, restatement, and amendment of the governing documents.

In summary, with a little foresight and spring cleaning, you can ensure your association operates smoothly and with as little conflict as possible. [↑](#)

Cari Ann Potts is an associate with the law firm Myers, Widders, Gibson, Jones & Feingold, LLP. She represents homeowners associations and public entities in both litigation and transactional matters. She also litigates construction defect, business, and insurance disputes.



Spring INTO Action!

Turning Resolutions into Results

By Ryan Gesell, CIRMS
Timothy Cline Insurance Agency



We're through the first quarter of 2015. You've had a couple of months to put those New Year's resolutions into effect. Have you started eating healthier? Are you working out more? Have you switched over to diet soda, cut your wine intake to 1 bottle a day, or even...crazy as it sounds, started drinking water? Regardless of your progress, it's not too late to make some positive changes in your personal life. We're still kicking off 2015. But in addition to evaluating your own progress, now is a great time to think about some things that your Board of Directors can do to make this a year of growth and prosperity for your Association. It's time to Spring-Clean your Association!

Here are four things you should consider...

- 1. Review your Governing Documents.** Are they outdated? Do they require things that are impossible, unethical, or no longer legal? Do they prohibit pets in the common area? Do they make reference to age or race anywhere? Do they prohibit wearing tap shoes on Tuesdays in the common area? Scary as it sounds, it's possible. You don't know what may be lurking in those pages until you actually take a look.
- 2. Review your insurance with your agent/broker.** Schedule a time to speak with them, or ask them to review your coverage and to offer any suggestions that they might have. There may be gaps in your coverage, or policies that you hadn't considered before that might be an option for you now. (Workers Comp? Earthquake?) He/she might even have some suggestions on things you could improve on your property that would make your community safer. (You'd be surprised how many unfenced pools are out there)



3. Put your money on your mind! Believe it or not, people are not always honest. I know. Shocking! I'm sure everyone on your Board is honest, trustworthy, ethical, etc. But even the most honest people, can act in desperate ways given the right set of circumstances. It could be a sick child, or a relative that needs treatment, or a lost job, etc. Nobody is beyond making a mistake. Hopefully though, you have a Fidelity Bond in place to reimburse you in the event that the Association's money is stolen. And hopefully, it's a good Fidelity Bond with broad coverage that includes both the Non-Compensated Employees (Board) and the property manager under the definition of an Employee. Here are some more things to look out for:

- a. Check the signature cards that your bank has on file. Are they up to date? Do they include anyone that is no longer on the Board?
- b. Is someone not authorized to sign the checks receiving monthly bank statements to review?
- c. Do you have your statements/records reviewed at least annually by a CPA?
- d. Does your Fidelity Bond cover just Employee Dishonesty? Or does it also cover Computer Fraud, Funds Transfer, etc.?
- e. Does your Bond Limit meet Fannie Mae requirements? (3 months of HOA Dues + Reserves)

Take a look at your procedures now, before it's too late.

4. Do your owners know what they are responsible for repairing, replacing, and maintaining? The most common question insurance agents get is from owners/lenders wanting to know the scope of coverage of the Master Policy. Most insurance policies point to the CC&Rs for the scope of coverage. I personally believe

that CC&Rs stands for Convolved, Complicated, and Ridiculous. It's universally accepted in this industry that CC&Rs are, by intentional design, the most confusing collection of words ever assembled by human minds. Brave souls that we are, we do read them, and try to make sense of them. But too many of them are ambiguous or contradictory. And ultimately, you are left with just the mere opinion of the manager, agent or Board member who read them. There is however, a solution. Make them more clear. Yes, it's possible. You and your board may want to consider having your legal counsel review your CC&Rs with the intention of putting together a matrix which would clearly illustrate who is responsible for the repair, replacement, and maintenance of all of the elements in the Association. Once you have this, you can send it out to the membership. This would not only help protect the Board from future liability, it would also go a long way toward ensuring that everyone is aware of their own responsibilities and can prepare accordingly.

Much like ourselves, our communities are a work in progress. You may not see changes over night, but it's important for a Board to identify goals for their community and take that first step toward fulfilling them. This will not only give you peace of mind, it will also help you fulfill your fiduciary duty as a Board Member. The spring is the perfect time to take stock and re-energize your efforts to better your community. Remember, a journey of a thousand miles, begins with a single step...or a single board resolution... and hopefully quorum... 

Ryan Gesell, Associate Vice President of the Timothy Cline Insurance Agency, has been actively involved in the CID Industry for the past 12 years, serving on multiple committees in both CAI-Greater Los Angeles Chapter and CAI-Channel Islands Chapter. Timothy Cline Insurance provides insurance for more than 1,300 CIDs throughout the west. A California native, and UCLA Graduate, Ryan holds the CAI designation of Community Insurance and Risk Management Specialist.



Planning Your Year – A Proactive Approach to Success

As Community Managers, we understand how complex and time consuming managing one account can be, much less the complex and robust portfolios that the majority of our industry handles on a day to day basis. Taking the time to plan for the year ahead with each of your accounts in key areas can make you more effective and better able to respond to the “unforeseen” issues that inevitably arise.

Each account in your portfolio, or that you handle individually, is different. They all have different critical dates that are crucial to adhere to, not only for the effective management of the account, but also to meet Civil Code requirements. Budgets, reserve studies and component replacement and repair, insurance renewals, annual elections and brush clearance to name a few. Taking the time to prepare a spread sheet for each of your accounts can help remind you of all these critical dates well in advance and reduce the stress of last minute work or worse, missing the deadline all together.

By having a visual reminder of these dates for your accounts, you can better manage your time and have the information or items completed well in advance of their due dates. Your Boards of Directors rely upon these items being completed in a timely manner and with accurate information to effectively run the associations in the generally small amount of time that they meet on a month to month, or in some cases, quarterly basis. Being organized and prepared for these critical items will allow you to present them in the same manner. Doing so will allow you to present a professional and polished image of yourself and your company to both your Boards of Directors and the homeowners within the community.

Although many due dates are bound by your accounts bylaws, individual fiscal years and reserve studies, we know through experience that most often, these dates rarely fall in line with their expected or scheduled times. Factors that influence these changes are numerous, including age of the association and its facilities, number of homeowners who reside there, association amenities and their level of day to day use and even the expectations of the Board of Directors, to name just a few.

To help manage these possibly unexpected shifts or changes in critical dates and to help organize your spread sheet, communication is crucial. As early as possible, reach out to the other vendors that service the associations and try to get in front of those items that you may not be aware of that they see on a daily basis. Plants grow, pool decks fade, and plaster cracks at different rates than often are projected or expected. By communicating with the vendors who are responsible for monitoring and maintaining these items, you most likely can plan well ahead for both small scale and large scale projects that left until the last minute can cause more work for as the Manager or worse, a greater expense for the association.



Other vendors that service your accounts, landscapers, pool maintenance, handymen and even gate repairmen, to name a few, often will complete your work orders as they are assigned, but may not be proactive enough to tell you when an unforeseen or looming repair or replacement may be warranted. By reaching out to them, you can bring these projects to light and plan for them in the upcoming year. You may find that you have more than one association with similar repair or replacement projects that you could put out to bid simultaneously. By doing so, you can lessen the time needed to hunt down multiple vendors at different times throughout the year and may even find better pricing for your associations from vendors seeking to secure multiple bids.

Taking a small amount of time early on to coordinate and plan for the year ahead will save you a great deal of time and stress, and quite possibly your associations money in the future. You may just find that you are able to handle even the biggest emergency with relative ease knowing that you are prepared and on track to handle all the other day to day and month to month items that would generally take up your valuable time.

Tina Nakamura is the Director of Community Management for Property Management Professionals. She has been in the industry for 12 years and holds the CMCA, AMS and PCAM designations.



THE HOASHOW

CAI-CHANNEL ISLANDS CHAPTER LUNCHEON

TUESDAY, JANUARY 27, 2015

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Spring Ahead

Cost Effective Solutions for Colorful Landscape Enhancements

By James Yarnall, ValleyCrest Landscape Maintenance

Spring is one of the most colorful of all seasons thanks to Mother Nature and a little helping hand from an experienced landscape service provider. The onset of spring signals a renewal of activity for plants that have been slowed or stopped by the short days and cooler temperatures of winter. Plants that went dormant come to life and people begin to spend more time outside.

It is an exciting time of year at HOA properties when the landscape begins to look better every week and adding seasonal color enhancements creates even more drama. Almost everyone notices flowers. Many managers report that color displays attract the attention of residents and visitors and complement a well-maintained landscape. This adds

value to the property, creates a pleasing atmosphere and gives the site an identity that distinguishes it from competing properties.

When a property is aesthetically appealing and colorful, people are happy to be there and properties with particularly dramatic flower displays may be chosen as a destination just to check out the flowers. Flower displays with large patterns of color have a significant impact at high-traffic sites. These displays should be different from what someone would want in a garden or park. To prepare for the spring season here are some cost effective landscape solutions designed to enhance a property's value and curb appeal, while still adhering to best practices in green landscaping.

Seasonal color displays can be expensive. The urge to reduce display size as a way to achieve cost efficiencies should be balanced against the result. Smaller display size results in significantly reduced visual impact. A better way to go would be to have fewer larger displays rather than reduce the size of all the displays.

Prioritize primary, secondary or tertiary areas. Keep large displays of color in the primary areas even if the tertiary areas get none. Adding significant amounts of color in high priority areas – even if it is one bed – is an investment that results in maximum impact. Keep in mind the flow of people. The goal is to have them see flowers sooner rather than later. After being wowed by a dramatic display walking in to a property, any displays seen later will have additional impact.

At HOA properties in Southern California, some landscape plans call for flower beds to be replanted four or five times a year with seasonal color. Instead, landscapers are converting some seasonal color beds – flowers that bloom in short cycles – to beds of color that do not need to be changed every three to four months. By converting some of the beds that are changed seasonally to flowering perennials that come back every year and thrive throughout the growing season, properties can reduce costs without dramatic impacts to the overall experience.

Perennials reduce the number of color changes needed during the year. Adding flowering perennials can add long-lasting color and make an eye-catching statement. A HOA landscape partner can recommend a plants list for the specific area in which a property is located.

Fall and winter are important seasons for many HOA properties. It is an exciting time of year when community managers can create pleasant holiday season environments for residents and visitors with colorful displays. Beyond the eye-catching color and drama, a property needs to have a winterizing plan that prepares the landscape at a property for the harsh months ahead. Here are a few key areas to consider:

People have strong associations with color. The changing season from summer to fall is associated with leaves turning from green to various shades of yellow, orange and red. Thanksgiving has these same colors associated with harvest items. Christmas and the winter solstice season have red and green. Colorful landscaping displays are part of the experience people expect at a property. And these days, everyone seems to embrace environmental values like sustainability and including local or native aspects of the environment in their surrounding landscapes. This all can be

accomplished with a little planning and coordination between the property manager and landscape services partner.

There are a number of plant choices for the traditional flower beds that you can consider incorporating into a landscape. There are many plants to consider that can tolerate cold weather and continue to bloom. There are also numerous good fall and winter choices that provide holiday season themed colors.

A landscape makes a powerful statement about a property, so mixed colors are not recommended for seasonal color. They are usually not an effective way to make a statement and rarely look professional. Remember it is not right or wrong but more effective versus less effective. Flowers are almost always an improvement. However, an appropriate analogy might be to ask: which looks more professional or businesslike, a bunch of flowers or a flower arrangement.

The most effective plantings involve the use of a single color, a two-color combination or a three-color combination. For example, mixed color plantings of Pansies appear dark because of the dominance of dark colors in the mix. Mixed Petunia plantings, while they are bright, appear random and less formal. Small containers or walkway plantings are well suited for single color plantings. Large installations can support three-color combinations easily. Picking the right colors could involve the use of a color wheel, or simply comparing colors in the nursery.

Mulching is also a big component of a cost-effective and healthy landscape. Shredded, composted green waste used as surface mulch saves the expense of having to haul it away or from having to purchase expensive bark products. Grass cuttings can be mulch-mowed back into turf areas rather than continually paying for removal and it is healthier for the grass too.

Another consideration for adding color to a HOA property is the use of potted plant displays. The pots should complement the property's buildings, hardscapes and other containers already in use such as trash receptacles. [↑](#)

James Yarnall is a Business Developer with ValleyCrest Landscape Maintenance. ValleyCrest has offices in Thousand Oaks and Ventura and provides a wide range of services including landscape maintenance, enhancement and irrigation.



featured members



DAVID YAMASHIRO, Community Property Management Community Manager Member

Employer: Community Property Management

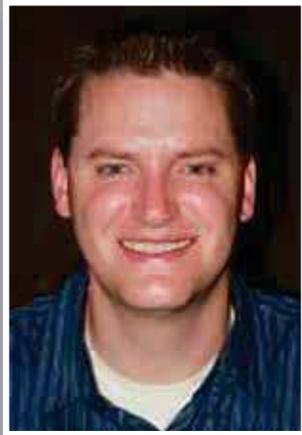
Number of years you have been there: 4 years

Hobbies: Badminton/ gardening/ eating-food

Number of years you have been a CAI Member: 3 years

Are you serving on a Chapter Committee? Community Faire

What do you find most valuable about being a CAI member? The educational programs and sharing info and ideas with my peers and industry vendors. I'm proud to be a part of a Community, working together for the betterment of HOA's.



AUSTIN WALKER, Gothic Grounds Landscape Business Partner Member

Employer: Gothic Grounds Management

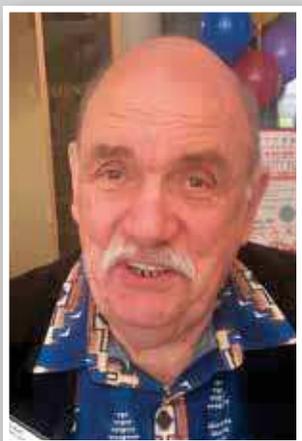
Number of years you have been there: 3 years

Hobbies: Supporting LA Sports Teams (Kings, Dodgers & UCLA), officiating high school basketball (formerly coached FS Boys Basketball at NPHS), golf, fishing and the outdoors.

Number of years you have been a CAI Member: Gothic Grounds has been a member for 5 years.

Chapter Involvement? Serving on Community Faire Committee and assisting with Check-in at Chapter Luncheons

What do you find most valuable about being a CAI member? Being able to connect with members in a non-traditional business setting. CAI provides a great opportunity to not only network but get to know people on a personal basis. Having an active chapter with well-attended events gives us vendors a fantastic opportunity to interact with members and have fun doing it!



TOM HUNT, Los Robles Estates Community Association Volunteer Leader Member

Community Association: Currently serving as a Board Member at Los Robles Estates in Thousand Oaks.

Number of years you have been there: As a resident, 24 years / Served on the Association's Board for 15 years

Hobbies: Jazz music lover, Active in Calvary Chapel Newbury Park, Campaign Volunteer for the Republican Party and proud Grandpa of 9 grandkids!

Number of years you have been a CAI Member: 13 years

Chapter Involvement: Serving on the Chapter's Board of Directors

What do you find most valuable about being a CAI member? CAI education and the information they provide is invaluable to my role as a Board Member. CAI keeps my Board and I up-to-date on the industry and providing solutions to the challenges in our Association.

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community governance

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ADVANCE REGISTRATION IS REQUIRED

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CHAPTER LUNCHEON

TUESDAY, FEBRUARY 24, 2015

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- Stay Green, Inc.

The Three Pillars of Community Strength

It's all about Making Good Decisions!



**SAVE THE
DATE!**

CAI-California Legislative Action Committee

22nd ANNUAL LEGISLATIVE DAY AT THE CAPITOL

April 12-13, 2015



Join movers and shakers from all over California as CAI-CLAC goes straight to the lawmakers in Sacramento to make our voices heard. Participate in education sessions for all levels of legislative experience, while the CAI-CLAC Delegates and Liaisons have their “position” meeting and get to know the CLAC Committee members at the “Dine with the Delegates” dinner.

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A Preview of Legislative Issues in 2015

*Skip Daum, CAI-CLAC Lobbyist
Sean D. Allen, Esq., Roseman & Associates, APC*

This year, approximately one quarter of the Legislature is comprised of first-time elected officials in both the Senate and Assembly. This means that there is quite a lot of work we will need to do in order to educate these new representatives regarding the importance of community association matters. That is why it is all the more important that our voice is heard in the coming year, so that the interests of community associations are not overlooked.

Although the new year is just beginning, we anticipate there to be two thousand or more bills presented by the end of February. Of those bills that have already been presented, only a handful appear to impact common interest developments in a meaningful way. This is a trend that is guaranteed not to last. Regardless, there are a few bills of note which may have an impact on community associations, and which will be addressed below.

There is currently a draft of an unnumbered bill which will affect condominium associations in that it seeks to require property sellers to disclose whether or not the unit being sold is FHA certified. If this bill gains traction, associations and their boards may wish to investigate the certification process in greater detail before it becomes a much larger issue. CAI has prepared an informative guide to FHA certification which is available to all of its members. The guide can be found on CLAC's website located at www.caiclac.com under the Legislative News

tab. This seventeen page PDF is a great resource for Boards and managers who need more information on starting the FHA certification process.

Another bill of note, Assembly Bill 205, attempts to deal with squatters, who have been an increasing problem for thousands of community associations during the economic downturn. Although the bill merely extends to a few cities and counties in northern California, it could be expanded to include all municipalities in California in the future. If passed, the bill would grant local authorities the right to arrest squatters who fail to provide proof that they either own or have a right to occupy the property that they are inhabiting.

There are also a couple of bills which will have a clear fiscal impact on community associations and other businesses. Senate Bill 3 seeks to increase the minimum wage to \$11.00 per hour in 2016, and to \$13.00 per hour the following year. This would affect all association employees, and will likely cause vendor service contracts to rise if the bill passes. Another bill, Senate Bill 8, will attempt to tax services similarly to how sales tax is currently applied to products, and community association related services may be targeted. A similar bill was presented in a previous Legislative session and it was vehemently opposed by hundreds of small business owners. We can expect there to be a massive fight over this bill regardless of its end result.

Finally, Senate Bill 47 would require the State to study artificial turf for potential adverse health effects resulting from exposure to the chemicals that may be found in synthetic turf. CLAC succeeded in killing two prior bills that would have forced community associations to allow artificial landscaping substitutions, but with the current drought conditions there is a significant interest in this matter as many people are increasingly considering installing synthetic turf in lieu of real grass. We expect to see several more bills presented on this topic in the future.

Don't forget to sign up for CLAC's 22nd Annual Legislative Day at the Capitol taking place on Sunday, April 12th and Monday, April 13th in Sacramento. Registration and sponsorship opportunities are available on CLAC's website under the Events tab.

Make sure to check back in with the CLAC Corner for additional updates as the legislative year ramps up. We will continue to keep you informed about the issues and bills that matter most to community associations. [↑](#)



Skip Daum represents CAI as a Lobbyist in Sacramento as he monitors bills that could potentially hurt or help the HOA industry. He has worked with CAI-CLAC since 1994.



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



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2015 Chapter Calendar of Events

Event dates and locations are subject to change so please visit www.cai-channelislands.org for the most up to date information.

- APR 12-13 CAI-CLAC Legislative Days** at the Capitol
- APR 18 Essentials Course**
The Courtyard Marriott, Oxnard, 8:30 am-4:00 pm
- APR 28 Chapter Luncheon** at Los Robles Greens
Thousand Oaks, 11:30 am
(Chapter Board Meeting at 10:30 am)
- APR 29-May 2 CAI Annual Conference** in Las Vegas, NV
- MAY 19 Chapter Luncheon**
The Courtyard Marriott in Oxnard, 11:30 am
(Chapter Board Meeting at 10:30 am)
- JUN 4 Mid-CA Program**
Ventana Grill in Pismo Beach, 6 pm
- JUN 11 Dinner Workshop Program**
Courtyard Marriott, Oxnard, 6 pm
- JUN 23 Chapter Luncheon**
The Courtyard Marriott, Oxnard, 11:30 am
(Chapter Board Meeting at 10:30 am)
- JUL 23-24 PMDP Course: M-204**
The Courtyard Marriott, Oxnard
- AUG 6 Dinner Workshop Program**
Los Robles Greens, Thousand Oaks, 6 pm
- AUG 11 Managers Program**
The Courtyard Marriott, Oxnard, 11:30 am
- AUG 25 Chapter Luncheon**
The Courtyard Marriott, Oxnard, 11:30 am
(Chapter Board Meeting at 10:30 am)
- SEP 10 Mid-CA Dinner Program**, Ventana Grill in Pismo Beach, CA, 6 pm
- SEPT 22 Chapter Luncheon**
Los Robles Greens in Thousand Oaks, 11:30 am
(Annual Meeting at 11 am)
- OCT 16 CAI Legal Forum: CA Communities**
8 am-6:30 pm, Location TBA
- OCT 29 Community Faire (Mini-Expo & Workshops)**
The Westlake Village Inn, 4:30-8 pm
- NOV 5 Mid-CA Dinner Program**
Ventana Grill in Pismo Beach, CA, 6 pm
- NOV 17 Chapter Luncheon**
Los Robles Greens in Thousand Oaks, 11:30 am
(Chapter Board Meeting at 10:30 am)
- NOV 20 Holiday Happy Hour / Awards Program**
The Westlake Village Inn, 5-7 pm
- DEC 15 Chapter Luncheon**
Los Robles Greens in Thousand Oaks, 11:30 am
(Chapter Board Meeting at 10:30 am)

Chapter Announcements

Welcome Sean D. Allen, Esq. to Roseman & Associates, APC

Please join us in welcoming new Senior Associate, Sean D. Allen, Esq. to the firm. Sean is a skilled attorney with litigation, appellate, and transactional experience in areas such as real property, contracts, business and corporate governance, interpretation and enforcement of governing documents, business entity formation, and bankruptcy. Commenting on Sean joining the firm was Steven Roseman, "We are pleased to have Sean supervise our firm's HOA division, and join our litigation team. He has a strong background in Real Estate, litigation and will add depth to our team"



Matt Ober, Esq. Appointed to Government & Public Affairs Committee by CAI Board of Trustees

Senior Partner of Richardson Harman & Ober PC, Matt D. Ober was appointed by the Community Associations Institute's (CAI) Board of Trustees to serve on the Government and Public Affairs Committee for a two-year term. The Government & Public Affairs Committee monitors public policy issues on a national, state and local level while advising the CAI Board of Trustees on public positions and non-routine actions pertaining to public policy. Congratulations, Matt!



Welcome Brian Moreno, Esq. to SwedelsonGottlieb

Brian Moreno recently joined the community association law firm of SwedelsonGottlieb as a Senior Associate Attorney, having practiced common interest development law since 2003. Brian is an active member of CAI in several Southern California chapters and has authored a number of articles pertaining to common interest development law and its application to community associations in California. Additionally, he has been a featured speaker at CAI events (including the 2015 National CAI Law Conference), as well as an approved instructor for various chapters in Southern California.



Thank you

to the following members for renewing your membership with CAI!

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Las Jollas De Rancho Grande Homeowners Association
Northshore Property Owners Association
Pepper Farms Homeowners Association
Peppertree Condominium Association
Rancho Adolfo Estates Homeowners Association
Riverview Ventura Homeowners Association
Surfside I Homeowners Association

Community Association Volunteer Leaders

Linda Kaplan, Anacapa View Homes
Nick Kozin
Carol Stamey, Carefree Living Association
Pat Stone, Oak Ranch Estates Homeowners Association

Community Managers

Michelle Armstrong, PCAM, Good Management, Inc.
Tita Heron, PCAM, Community Property Management
Cathy Honorof, Preferred Association Management
Lyn Immel, Buenaventura Gardens
McKenna Keays, Good Management, Inc.
Jennifer Knauff, Community Property Management
Annette M. Louder, CMCA, AMS, PCAM, Sherwood Valley Homeowners Association
Sascha Macias, CMCA, AMS, FirstService Residential
Stephen O'Rourke, CMCA, AMS, PCAM, Encina Royale
Karen Posada, CMCA, AMS, KLP Management
Michael Powderly, CMCA, Real Estate Offices, Inc.
Carol Stephenson, PCAM, Integrity Management Group
Sarah Taylor, CMCA, Gold Coast Association Management
Gabrielle Vignone, Surfside III Association
David Yamashiro, Community Property Management

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W e l c o m e

The Channel Islands Chapter of CAI welcomes the following new chapter members who joined in January, February and March 2015:

Community Association Volunteer Leaders

David Ottman, Surfside I Homeowners Association
Patricia Pettinelli, Lakeshore Community

Community Managers

Lupe Aguilera, Spectrum Property Services
Cheri Conti, Spectrum Property Services
Kurt Skelton, Kennedy Accounting

Management Companies

CHASE BLACKSTONE, INC. (DEBRA SCHAUB)

The principal of Chase Blackstone, Inc., Debra Schaub, has been serving the HOA Communities in the Ventura and Los Angeles Counties for over 15 years. Debra holds the designation of California Community Association Manager (CCAM), is a licensed real estate agent and is an active member in CAI-Los Angeles and looks forward to working with CAI-Channel Islands Chapter.



Chase Blackstone, Inc. opened in December 2014. Debra says, "I am thrilled to have the opportunity to once again be a part of CAI and offer my time and talents in anyway that I can. CAI is an organization that offers so much to the CID community through Education and Social extensions. I am proud to be a part of this Organization and all that it provides."

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A-One Construction has 30 years managing construction projects and has the experience you can trust. Our construction technicians are manufacturer certified and are specially trained to work on large development community projects. A-One Construction has a solid reputation of delivering projects built to code, built cleanly, built to budget, and built on time. Importantly, our strength is in our customer satisfaction.



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We are excited to be a part of the CAI-Channel Islands Chapter and are looking forward to working closely with communities and management companies to help them achieve their goal of a well-maintained community.

FERNALD LAW GROUP (BRANDON FERNALD)

Fernald Law Group is a trial litigation boutique, handling a variety of civil litigation including real estate, broker duty, insurance coverage and common interest development litigation. We also regularly advise HOA Boards, Board Members and HOA management companies on issues relating to HOAs, including labor/employment, corporate governance, insurance, regulatory compliance and homeowner disputes.



We look forward to being the new face in the crowd as we meet Chapter Members and bringing a new perspective to Common Interest Development issues.

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combined insurance experience both on the brokerage side and in executive leadership positions on the carrier side. Jon, Elise and Josh are excited to be a part of the CAI Family. We are looking forward to building relationships to be a valuable resource to the HOA Managers and Board Members. We understand the intricacies of properly insuring your interests and CAI will be our partner in monitoring the current trends and regulations facing HOA's.

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We look forward to supporting CAI and its members and enjoying the personal connections that are possible in community. 📍

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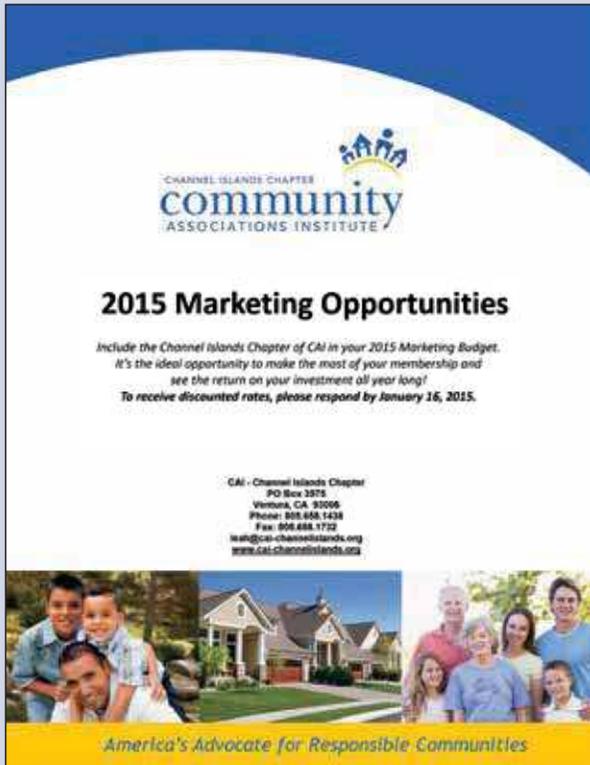
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Schedule of Events

April 12-13

CAI-CLAC LEGISLATIVE DAY
Sacramento, CA

April 18

ESSENTIALS COURSE
Oxnard, CA
8:30 am-4:00 pm

April 28

CHAPTER LUNCHEON
Thousand Oaks, CA
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