

# Common Terra

The publication of CAI of San Antonio - *The Source* for Responsible Communities

First Quarter 2021



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## How to Keep Your HOA Healthy

by Beth Gilbert, AppFolio

**M**anaging the daily operations of a homeowners association can make it hard for board members and community managers to carve out time to evaluate the health of their association. Though it may be one more thing that goes on the to-do list, knowing your community's financial standing, curb appeal, and the relationship with residents is well worth the time and effort.

Board members have the responsibility to preserve, protect, and enhance homeowners' property while community managers coordinate and execute the services needed to run the association, also acting as trusted advisors to the board with their vast knowledge of governance, operations, and management. It's critical for board members and their community managers to partner and leverage each other's strengths and skills to assess the health of their association and execute a plan of action.

There are five areas to evaluate. During the process, community managers and board members should create a spreadsheet to take detailed notes that enable them to quickly turn findings into a plan to share with residents.

**HOME VALUES.** Residents want to ensure the value of their home is maintained when choosing to live in an association. Conduct research to review property values

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## The Show Must Go Online

by Kiara Candelaria, Associate Editor of Common Ground™ Magazine.

**W**hen cases of COVID-19 began to increase throughout the U.S. in March, the newly elected board of directors at Jantzen Beach Moorage in Portland, Ore., discussed how to best continue conducting board meetings as local and state officials issued stay-at-home orders limiting in-person gatherings.

The community's 20-year-old bylaws did not have a provision on holding meetings remotely, but, "There were quite a few people that, either through their work or communicating with family, had already been using virtual meeting platforms," says Connie Johnson, board president of the community of 177 floating homes. "It was a pretty easy transition." Participation was an issue when board meetings were held at the clubhouse, as just over

(Continue on p10)



## Art Downey

Editor, Common Terra

Three features make community association homes different from traditional forms of home-ownership. One is that you share the use of common land and have access to facilities such as swimming pools that often are not afforda-

ble any other way. The second is that you automatically become a member of a community association and typically must abide by covenants, conditions and restrictions (CC&Rs). The third feature is that you will pay an "assessment" (a regular fee, often monthly, that is used for upkeep of the common areas and other services and amenities). There are many advantages to living in this kind of development. The community usually features attractive combinations of well-designed homes and landscaped open spaces. The houses may even cost less than traditional housing due to more efficient use of land.

Parks, pools and other amenities, often too expensive for you to own alone, can be yours through association ownership. So, now you have a chance to use and enjoy the pool, tennis court or other recreational facilities that may have been unaffordable previously. What's more, you won't have direct responsibility for maintenance, so you won't have to clean the pool or fix the tennis nets, and you may not even have to mow your lawn. But that doesn't mean you'll never have to think about it. The community association operates and maintains these shared facilities. Of course, you'll pay your share of the expenses and, as an association member, you'll have a

voice in the association's decisions. The association may have one of a variety of names: homeowners association, property owners association, condominium association, cooperative, common interest community or council of co-owners. This issue of Common Terra will focus on the responsibilities of volunteer boards and property managers to insure these amenities are safe and well maintained; that the CC&Rs are observed; that all owners contribute their fair share by paying their assessments in a timely fashion; and that the association is managed in an open and fiscally responsible manner.



**CommonTerra** The publication of the San Antonio Chapter, CAI *the source* of responsible communities

**Mission Statement : To enhance community association living in San Antonio and South Texas by promoting leadership excellence and professionalism through education, communication, advocacy and resources**

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*"I can't wait to see the great things we will accomplish together in 2021 as we work to grow the Chapter; educate; advocate; network; and cultivate lasting relationships with our members."*



## The President's Message —

### Happy New Year, my friends!

I hope I find you and your families safe and healthy. I don't know about you, but I am super excited for all the new changes taking place in our Chapter in 2021. First, we've ushered in a new Executive Director! Jesus Azanza has joined our team. Jesus comes to us from the Houston CAI Chapter. Jesus has done amazing things for Houston, so we thought we'd bring him to San Antonio so he can sprinkle a little magic our way. We are all thrilled to have Jesus onboard and hope you'll all welcome him with open arms. Stay tuned, because he'll be reaching out to all of the committees in the coming weeks. You'll also get to see Jesus when he mans the ship at our upcoming Zoom meetings. Be sure to give him a wave!

Second, I'd like to welcome the new 2021 Board of Directors. Cassie Thompson is our President-Elect. Art Downey is Vice President. Secretary is Clay Hadick. Treasurer is Amy Atkins. Directors are Harmon Hamann, Doug Smith, Richard Gonzalez and Russell Birdy. This is a great group, folks. The Chapter is in wonderful hands with these remarkable professionals in charge. I can't wait to see the great things we will accomplish together in 2021 as we work to grow the Chapter; educate; advocate; network; and cultivate lasting relationships with our members. Speaking of new, we've got the Chapter's first ever golf tournament coming up at the end of February. The Golf Tournament Committee is working hard to secure spon-




sors and players for what is sure to be an excellent networking opportunity for our members and a safe way for us to all get together and have some fun. If you aren't a golfer – no worries! There are lots of ways for you to participate in the tournament. Come hang out with us at the beautiful Canyon Springs Golf Club and bring your family and friends! The event is open to anyone who wants to pay to play.

In closing, I just want to say that I am grateful for the trust that has been placed in me as the incoming President of our amazing Chapter. I am committed to working tirelessly with the Board, our committees and our members to meet and exceed the Chapter's 2021 goals and objectives during my tenure, and I'm thrilled that you'll all be joining me for the ride!

My best to all of you. Here's to a great year!

**Leah K. Burton**  
**lburton@RMWBH.com**

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# UPCOMING CHAPTER EVENTS

## 2021 GOLF TOURNAMENT



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February 26<sup>th</sup> @ 11:00 a.m.  
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# How to Keep Your HOA Healthy

(Cont. from page 1)

in the community. Have they gotten higher or lower in recent months, or do they seem steady? This data can easily be collected through websites such as Zillow, Redfin, and Trulia, which make it simple to compare home prices in the area. While home values may be in great shape, that's only a small piece of community health.

**CURB APPEAL.** Tying into the value of homes is the physical condition of the community, which is one of the simplest things to assess at a glance. Does the community look like a place people are proud to call home? Are trash bins being put away, yards well-trimmed, and common spaces clean? Fresh paint, clear walkways, and clean and safe common areas are critical to the overall look and feel of the community. If this is not the case, think about increasing communication about rules and boosting violation notices. The beautiful look and feel of the neighborhood is one of the reasons people choose to live in associations in the first place.

**PROPER BUDGETING.** Budgets are crucial to a homeowners association's financial operation. Homeowners can tell when things are off if monthly assessments increase at an alarming rate or if a special assessment is approved to cover budget shortfalls. Similarly, high delinquency rates also may be a red flag that the association is not getting the funding it needs to cover expenses.

While considering regularly occurring costs, it's essential to plan for future projects, as well as those unexpected line items that may creep in, which brings us to reserve funding.

**RESERVE FUNDING.** Are your community's reserves adequately funded? Do you follow regional rules and regulations regarding the frequency of reserve studies? If a large, unexpected project arises, can you cover it? Homeowners are ever fearful of hearing that they may have to pay a considerable special assessment for a project that should have been planned for. Inadequate reserve funding also may keep potential homeowners from buying into a community.

Large-scale projects that do not occur every year should be budgeted for in advance to avoid assessment increases when the time comes to replace

components. Take a look at the estimated years left on each component in your community and the percentage funded to date. For example, if your community needs the roof replaced in five years knowing that roofs must be replaced every 20 years, reserves should be 75% funded.

Reserve studies can be complicated; associations should rely on a reserve specialist to help. It's well worth it in the long run.

**COMMUNITY CULTURE.** Does the board and the community manager have a good pulse on homeowners' views of the association? Is there a strong relationship with homeowners, or is the only contact with them when something is wrong? If so, it might be time to start some positive outreach to make them feel more connected to the community.

Ensure that you're engaging with residents by the means that they prefer, such as via email, social media, or text messages. Make sure there is two-way communication so homeowners can ask questions and feel like part of the bigger picture in the association. Holding events outside of regular board meetings also is a great way to get people together and talking as a community. Events like summer potlucks, spring mixers, and volunteer appreciation parties help build connections between neighbors, the board, and the community manager.

Board members should partner with their community managers to develop a health assessment report and a plan of action to get their communities back on track, if necessary, or identify areas for improvement. It's not going to happen overnight, but if you take it one step at a time, you will get there.

Start by tackling the low-hanging fruit, such as reviewing home values and determining the general physical condition of the properties and common areas. Then start chipping away at the more labor-intensive tasks like budgeting and reserve funding. Set a goal to get the community in better shape within a year, and also set regular reminders—perhaps quarterly or biannually—to update the board and homeowners on how far a large-scale project has come toward completion.

Healthy associations have informed board members, knowledgeable community managers, and engaged

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## How to Keep Your....

(Cont. from page 6)

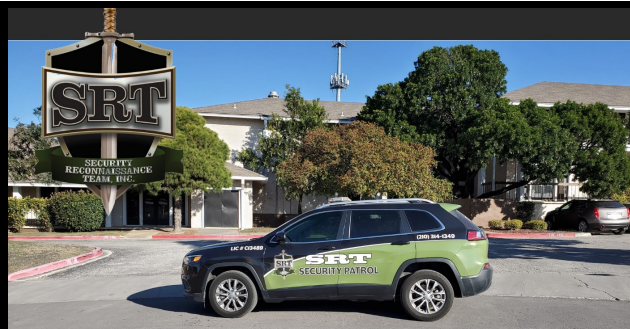
homeowners who are happy and confident in the management of the place they call home.

### About the Author



*Beth Gilbert is the senior director of the community association market at AppFolio. Gilbert brings over 15 years of product experience to AppFolio and is currently responsible for developing the vision and strategy for the community association market.*

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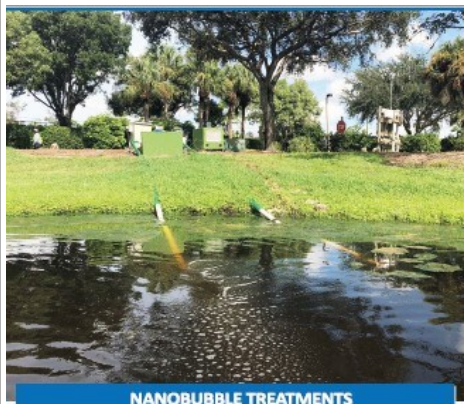
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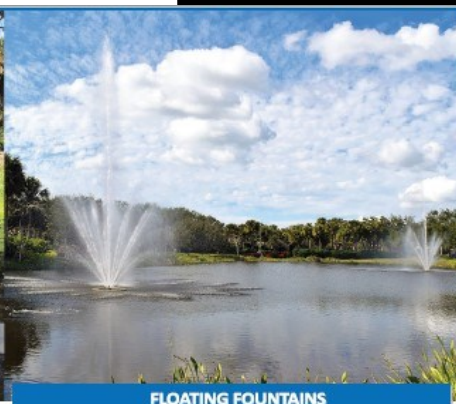
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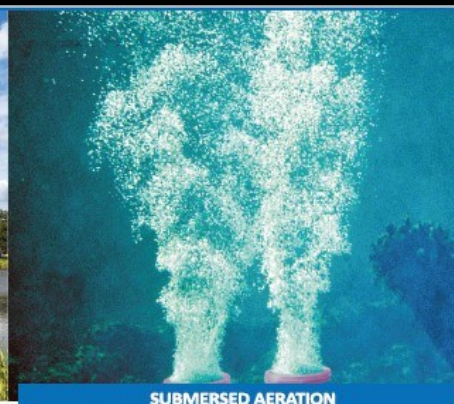
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# Rights and Responsibilities for Better Communities

## *Principles for Board Members*

*An association's board of directors also exercises certain rights and responsibilities.*

### **Board members have the *right* to:**

1. Expect owners and non-owner residents to meet their financial obligations to the community.
2. Expect residents to know and comply with the rules and regulations of the community and to stay informed by reading materials provided by the association.
3. Respectful and honest treatment from residents.
4. Conduct meetings in a positive and constructive atmosphere.
5. Receive support and constructive input from owners and non-owner residents.
6. Personal privacy at home and during leisure time in the community.
7. Take advantage of educational opportunities (e.g., publications, training workshops) that are directly related to their responsibilities, and as approved by the association.

### **Additionally, board members have the *responsibility* to:**

1. Fulfill their fiduciary duties to the community and exercise discretion in a manner they reasonably believe to be in the best interests of the community.
2. Exercise sound business judgment and follow established management practices.
3. Balance the needs and obligations of the community as a whole with those of individual owners and non-owner residents.
4. Understand the association's governing documents and become educated with respect to applicable state and local laws, and to manage the community association accordingly.
5. Establish committees or use other methods to obtain input from owners and non-owner residents.
6. Conduct open, fair, and well-publicized elections.
7. Welcome and educate new members of the community—owners and non-owner residents alike.
8. Encourage input from residents on issues affecting them personally and the community as a whole.
9. Encourage events that foster neighborliness and a sense of community.
10. Conduct business in a transparent manner when feasible and appropriate.
11. Allow owners access to appropriate community records, when requested.
12. Collect all monies due from owners and non-owner residents.
13. Devise appropriate and reasonable arrangements, when needed and feasible, to facilitate the ability of individual residents to meet their financial obligations to the community.
14. Provide a process residents can use to appeal decisions affecting their non-routine financial responsibilities or property rights—where permitted by law and the association's governing documents.

NOTE: The complete list of rights and responsibilities for better communities for homeowners and community leaders can be found for free at [www.Caionline.org](http://www.Caionline.org).

# 87<sup>th</sup> Texas Legislative Session Kicks Off January 12

by Paul Gaines, RMWBH Law

The start of another session of the Texas Legislature is here. Beginning on January 12, 2021, lawmakers will have 140 days to debate over changes to Texas law. It is still not completely known how this session will unfold during the ongoing COVID-19 pandemic. It is expected lawmakers will spend the majority of the session focusing on COVID-19 related relief, and of course, the decennial process of redistricting. Yet, in the first few weeks of pre-bill filing for the 2021 session, we have found several bills that may affect property owners' associations ("POA") if passed. These bills are provided below:

**HB 67 – Relating to Unenforceable Restrictive Covenants Related to Swimming Pool Enclosures** – If passed, this bill would prohibit a POA from adopting or enforcing a provision in a dedicatory instrument that prohibits or restricts a property owner from installing on the property owner's property a swimming pool enclosure that conforms to applicable state or local safety requirements.

**HB 191 – Relating to the Prohibition of Housing Discrimination on the Basis of Sexual Orientation or Gender Identity or Expression and to the Enforcement of that Prohibition** – If passed, the bill would essentially add the terms "Gender Identity or Expression" and "Sexual Orientation" to the protected classes under Chapter 301 of the Texas Property Code (Texas Fair Housing Act)

**HB 485 – Relating to the Removal of Certain Unconstitutional Provisions from Real Property Records** – Permits an owner of real property to file suit to remove from a recorded instrument affecting or conveying an interest in the property a provision that: (1) violates the United States Constitution; (2) is unenforceable under law; and (3) is unambiguously discriminatory

**SB 222 – Relating to the Removal of Certain Discriminatory Restrictions and Provisions from Certain Real Property Records** – Permits an owner of real property to request on a form provided and created by the Attorney General, that the County Clerk remove a discriminatory provision or restriction (as defined by Sec. 5.026 of the Texas Property Code) from a recorded instrument

**SB 206 – Relating to the Operation of Certain Low-Powered Vehicles** – Amends Sec. 551.304 of the Transportation Code to permit the operation of golf carts in a master planned community without a golf cart license plate

**HB 801 - Relating to a Certification Program for Assistance Animals; Authorizing Fees; Imposing a Civil Penalty** – Establishes a certification program for assistance animals in Texas, including but not limited to obedience training, evaluation by a licensed veterinarian and evaluation of the primary owner by a mental health professional. Establishes a statewide assistance animal registry. Also prohibits assistance animals in common recreational areas of master planned communities subject to restrictive covenants limiting residency to persons 55 years of age or older unless the assistance animal is certified and meets the additional requirements under the bill.

For a more in-depth explanation of these bills, please watch RMWBH's 2021 Legislative Preview webinar available on the RMWBH website at <https://www.rmwbh.com/publications/webinars/>. How these bills will progress through the Legislature, and whether they will change during the process, is still to be determined.

It is also still to be determined if we will see more bills filed that affect POAs. The first few days of pre-bill filing were filled with numerous bills crossing the chambers in Austin, but in the weeks following, pre-bill filing has slowed unlike prior sessions. Of course, this may change in the following months as the regular session develops. For further updates, make sure to regularly check RMWBH's blog, LinkedIn pages and Community Association Newsletter where we will continue to track the progression of the 87<sup>th</sup> Legislative Session and relevant POA bills.

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## About the Author



*Paul Gaines is an associate attorney with the firm's Real Estate section as a part of the Community Association Team. He focuses his practice on community association law and represents the firm's clients in the Central and South Texas areas. Paul graduated from St. Mary's University School of Law in 2015.*

## The Show Must Go Online

(Cont. from page 1)

half of residents live at the community year-round, while the rest lease their homes as long-term rentals. Johnson says that often 10 or fewer people would show up to an in-person board meeting, but since the community switched over to holding meetings virtually, they are "quite well attended."

Virtual meetings were uncharted territory for many community association boards forced to continue business online because of the pandemic. Some wondered if the technology would be easy for all residents to understand and use. Others expressed concerns about privacy and security and reached out to attorneys for guidance on keeping meetings compliant with governing documents and state statutes.

Even as states began lifting restrictions that limited in-person gatherings, some community association leaders were discussing whether to hold their annual general meeting and elections virtually if cases of the coronavirus continued to surge across the nation.

Most community associations did not have a plan in place to host meetings remotely before the pandemic, but Michael B. Stonestreet, CMCA, AMS, PCAM, president of Community Association Management Services in Wilmington, N.C., says his firm was already prepared to transition to an online format quickly because of their location along a coastal area.

"We're used to having hurricanes, and we're set up technology-wise to work remotely. What we had to do was educate our boards to get on (videoconference platforms), which has gone unbelievably well," says Stonestreet, whose company manages around 650 community associations in North and South Carolina.

### **FOLLOWING PROCEDURE**

Virtual meetings should follow the same parliamentary procedure as an in-person meeting, including having an agenda and time limits for attendees to provide comment, Stonestreet says. Board members and residents should have equal access to the information

shared in the meeting, the opportunity for discussion and debate, and the ability to vote for it to be compliant.

Johnson stresses the importance of adhering to the meeting's agenda and staying on topic. She often starts the board meetings going over the rules and her expectations for residents' conduct before the board and committee members give their reports and community updates.

To make the meeting more streamlined, the Jantzen Beach Moorage board decided to no longer use the chat function on their online meeting platform to reduce distractions. Instead, the board allows two-minute turns for residents to offer comments during the discussion section. "The virtual meeting gives people the opportunity to listen more and not have those knee-jerk reactions to something that they might want to express their opinions about immediately," Johnson observes.

Etiquette is one aspect that differs when conducting a meeting online. Stonestreet recommends that attendees turn their camera on (if they have one) to be able to see one another and increase engagement. He also advises residents to "practice the pause" in a virtual setting so that everyone can speak without interruption.

"You don't want to lose the personal touch either, and that can happen with a virtual meeting," he adds. "It's good to check in with everybody to see how they're doing, see how their families are doing, just to keep it human."

Two potential legal issues have come up regarding virtual meetings, according to Adrian J. Adams, founder and managing partner at Adams Stirling in Los Angeles: making video recordings and holding closed session meetings.

Recordings should be taken for the benefit of owners who could not attend the meeting, but they are all subject to subpoena if there's litigation. Additionally, they could be altered by homeowners if made available for

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# The Show Must Go Online

(Cont. from page 10)

download and posted on the internet—a new reality in today's era of deepfakes, or manipulated videos.

Confidentiality is a concern when boards have closed session virtual meetings, because they may not always know who else is in the room offscreen, Adams notes.

Craig Wilson Jr., CMCA, AMS, PCAM, president and CEO of Vanguard Management Associates in Germantown, Md., says the biggest hurdle for boards is identifying that participants are indeed members of the association.

"It's certainly possible that somebody could call into a meeting and be an outsider, or a husband and wife can call separately and essentially get two votes by not being able to qualify who they are over a phone or Zoom call," Wilson points out. "One thing our attorneys have been cautioning associations about is, if you can't be assured of who's participating and who's voting, then you shouldn't hold (the annual meeting) virtually."

Some of the sources interviewed say that they use the waiting room feature in platforms such as Zoom to confirm the identity of homeowners by name and unit number before allowing them to enter a meeting.

## VOTING ONLINE

Holding meetings virtually has brought questions about how residents can cast votes for an election during an association's annual meeting—and how boards can remain compliant with their governing documents.

Mark Einhorn, an attorney with Marcus, Errico, Emmer & Brooks in Braintree, Mass., says that many associations his firm represents in New England chose to vote by directed proxy at the annual meeting, designating a board member to cast a vote on behalf of residents instead of going in person. The election results were then shared virtually.

North Carolina Gov. Roy Cooper issued an executive order in April that allows corporations (including homeowners associations) to hold their annual meetings virtually. Stonestreet says state law also permits associations to vote electronically during an annual meeting; some of

the communities his company manages have had residents send their votes through email and verify them against an owner's address on file.

Electronic voting is not permitted in California, and a law that went into effect on Jan. 1 requires that associations designate a person to serve as an election inspector and count the ballots. Michelle Rodrigues, CMCA, AMS, of Seabreeze Management in Simi Valley, Calif., who is interim general manager of a 238-unit high-rise in downtown Los Angeles, says that the board has met this requirement by having the designated elections inspector tally the ballots on camera.

Community association boards also have turned to election services providers to help them transition to online voting. Ben Zelikovitz, co-founder of GetQuorum in Toronto, says boards should look to their governing documents, state statutes, and executive orders that may grant them emergency powers, in addition to consulting with legal counsel if they are thinking of switching to electronic voting.

He also recommends that boards determine how receptive owners in the community would be to online voting before seeking out an election services provider.

Denise Lash, founder and principal of Lash Condo Law in Toronto and a principal of CondoVoter, says her company provides advanced voting, which allows residents to preliminarily fill out their ballot but make changes right up to the annual meeting if owners submit nominations. "When the chair closes a vote at the meeting after taking nominations, they click the button and then the votes are tallied," explains Lash, who also is a founding member and past president of the CAI Canada Chapter.

## INCREASED ENGAGEMENT

For many associations, including those with a large percentage of homeowners who don't live in the community full-time, online meetings have shown an increase in participation and resident engagement.

Donna Coates, general manager of Briny Breezes, a 486-home community in Lake Worth, Fla., says that seasonal residents who stay in the community

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# CED Corner



**Jesus Azanza**  
Chapter Executive Director

Dear CAI San Antonio Chapter Members, It's an exciting time for our chapter! As your new Executive Director, I am honored to have the opportunity to advance our mission to educate, connect, and advocate for community associations across San Antonio. As a 14-year veteran of 501 (c)6 trade associations and current Executive Director for the CAI Greater Houston Chapter, I am delighted in the potential for CAI, and welcome you along for what will be a very engaging and fulfilling ride.

What appealed most to me about the opportunity to lead the CAI San Antonio Chapter as Executive Director was the chance to grow CAI's presence in a market rich with culture and historical significance. I have spent the last year and a half of my professional career working with community association professionals, volunteer board leaders, and business partners in the fourth largest city in the U.S. – in each instance garnering a deeper understanding of the important role CAI plays in the advancement of our industry. Levering my existing experience will undoubtedly serve as my foundation as I get to know

each of you and get to work on developing a value-driven action plan.

The success of our chapter lies not with one individual, but with the collective group. With the support of the Board of Directors and committees, there is no challenge we cannot overcome as we continue in our quest to serve as the go-to resource for community associations in San Antonio.

As you all know, COVID-19 has upended our daily lives and impacted the way we do business. Our chapter's ability to create in-person experiences that create connections, deliver membership value, and generate operational cashflow has been severely impacted over the last 10 months. Nevertheless, we will continue to find new ways to build on our virtual programming until we can physically gather in a more meaningful way. I would like to thank the 2020 sponsors who have stuck by our side and supported us as we continue to navigate the pandemic – without your support we simply would not exist!

I hope to have the opportunity to get to know you — our members, sponsors, and volunteers — and invite you to attend an upcoming webinar or in-person event later this year. Our first in-person event of 2021 is our Golf Tournament scheduled for February 26<sup>th</sup> at the Canyon Springs Golf Club. I hope to see you there!

In the meantime, I encourage you to call or email me at 210.389.6382 or [ced@caisa.org](mailto:ced@caisa.org) – your perspective is invaluable. **Now, let's get working!**

**Due to growing health concerns with the COVID-19 virus the Board of Directors has decided to postpone all CAI San Antonio events until further notice. "Our top priority is the health of our members and feel that it is best to err on the side of caution." We thank you for your understanding and wish you all the best during this time of uncertainty. We will keep you informed**



## Our Mission Statement is....

*"To Enhance Community Association Living in San Antonio and South Texas by Promoting Leadership Excellence and Professionalism Through Education, Communication, Advocacy and Resources."*

*Jesus*

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## The Show Must Go Online

(Cont. from page 11)

from October to January appreciate the increased transparency. "We can take care of some very important business items, especially during this emergency time," she adds.

Dave Norton, CMCA, AMS, community manager and owner of Spectrum Management Associates in Sedona, Ariz., says the boards of the communities his company manages have seen an increase in homeowner attendance compared to when meetings were held in person. He cites the convenience and flexibility of virtual meetings as homeowners are able to join from their phone, tablet, or a computer at home.

He also notes that boards can make use of the visual aspect of online meeting platforms for the benefit of residents. "With an online meeting, we can share documents, reports, and spreadsheets, and everyone has the chance to see the same document at the same time," says Norton.

However, some interaction can be lost during a virtual meeting even if attendees can see and hear one another, Einhorn points out. "You don't really have a back-and-forth dialogue, or the question-and-answer session isn't as lively," he says.

He adds that some associations his law firm represents do not feel comfortable holding meetings virtually, and are planning to hold their annual meeting at a physical location while observing social distancing.

### VIRTUAL FUTURE?

Some communities are finding that meetings are much more efficient since switching to an online format.

"People are on time, they are focused, and the meetings are going much quicker from start to finish because they're just dealing with business," explains Stonestreet of Community Association Management Services. He adds that meetings are more orderly, as online platforms such as Zoom allow a moderator to mute attendees to keep order and for residents to raise their hand until it's their turn to speak.

Stonestreet believes that virtual meetings are "a game changer" for associations and community managers. "They're a very efficient use of everybody's time. No one has to drive to a location or even get ready and walk down the street. They can do it at their home."

Rodrigues, of Seabreeze Management, agrees on the flexibility of attending evening meetings from her home office as opposed to a long commute. She says that a board member suggested continuing to have meetings

virtually even after it's safe to meet in person because it allows the high number of owners who have a unit as a second residence or leased as a rental to participate.

Einhorn, the Massachusetts attorney, says the trend toward virtual meetings and electronic voting has been developing for several years as boards have looked to facilitate attendance and boost participation by accommodating residents' busy schedules.

"Many of our clients were having a hard time getting quorum at a meeting and even finding candidates who want to serve on the board. Boards were looking at virtual meetings as a way to make it easier for people to attend, and that has only accelerated" due to the COVID-19 pandemic, he remarks. "We're trying to be flexible, because the technology is going to change quickly in this area."

Adams believes that whether associations continue holding virtual meetings instead of in-person meetings after the pandemic will depend on the size of the community. He believes smaller communities will find it easier to meet online because they may not have the space to hold an in-person annual meeting.

The percentage of nonresident owners compared to full-time residents also may sway boards to continue holding meetings virtually. "People who could not previously attend meetings because they were in other parts of the state or out of state may put pressure on the boards to continue with virtual meetings," says Adams.

Lash sees associations moving to hybrid meetings, where residents may attend in person but vote online using their phone or tablet. "Managers are the ones who will be pushing it because they've been doing most of the work up to this point, and now they know there's an easier way, a shorter way," to tally proxies or count votes, she notes.

GetQuorum's Zelikovitz believes that community associations will prefer to go back to in-person meetings, but that the communities his company serves will offer advanced electronic voting "because that's where you get high participation rates."

While it's still too soon for Briny Breezes to determine how it will hold its annual meeting in February, Coates says the board was preparing to host it virtually, including passing a resolution in mid-July to allow electronic voting for the community's elections.

(Continue on p16)



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## The Show Must Go Online

(Cont. from page 14)

She also encouraged the board to pass a resolution that would allow the community to continue holding meetings online, especially as cases of COVID-19 rose across several states, including Florida, during the summer.

"We're used to dealing with hurricanes and having emergency meetings, but COVID-19 is a different thing. It's an emergency situation that none of us have ever had to deal with, and it isn't going away," she says.

### ON THE LAW

One of the questions association boards asked while moving in-person meetings and voting to an online format was: Does state law allow it?

Rules and regulations on online meetings and electronic voting vary depending on the state. For example, virtual meetings are allowed by California statutes, but associations still must provide a physical location for homeowners to be able to participate in person, says Adrian J. Adams, founder and managing partner at Adams Stirling in Los Angeles.

Because of the COVID-19 pandemic, Adams says that associations have technically been in violation of the statute. "We're trying to get the statute changed to make an exception for emergencies so that they don't have to meet physically," he notes.

Some community association boards and management companies also have inquired about adopting electronic voting before holding their annual meeting, says Cathi Sleight, vice president of business development at VoteHOANow in Tigard, Ore. At least 24 states allow electronic voting while another 10 are silent on the issue, meaning that associations can create a set of rules that outline the voting process they can use, according to Sleight.

In addition to state laws, boards should review their governing documents and consult with legal counsel before moving forward with online meetings or electronic voting. —K.C.

### BEST FACE FORWARD

Online meetings have become the preferred—and sometimes only—method for community associations to continue business during the COVID-19 pandemic. Despite the ability to meet from the comfort of one's home, it's a good idea to maintain a professional-looking space and have proper etiquette during a

meeting.

Here are some tips that both attendees and presenters can follow:

- Announce yourself when you join and rejoin a meeting.
- Mute your microphone if you need to cough, speak to someone at your location, or if there is background noise, such as dogs barking or children crying.
- Don't create noise if you have an unmuted microphone. Turn off your television, radio, and phone if it isn't being used for the call.
- Turn on your camera (if you have one) for others to be able to see and hear you.
- If you need to leave the meeting, inform everyone before disconnecting from the platform.
- Have a proper light source to sit in front of during the online meeting; some have turned to ring lights. Avoid sitting in front of a window.
- Make sure that the area behind your camera is clear of clutter and other things that might be distracting. You also may use a physical or digital background, perhaps even one with the association logo, to keep things out of view.
- If you are giving a presentation, use an online teleprompter to know what you are saying in each slide.

### About the Author



*Kiara Candelaria is an associate editor for CAI's print and digital publications. She is a writer and editor with over five years of professional and volunteer experience in student media, trade media and nonprofit publications. Knowledgeable about a variety of topics written across print and digital platforms*



# Good Neighbors Make a Great HOA

by Laura Otto

A simple “hello,” a wave as you walk by, or organizing a community activity are just some of the ways you can be a good neighbor. However, as remote working, virtual learning, and social distancing have become the norm, finding new ways to be an engaged neighbor have never been more important.

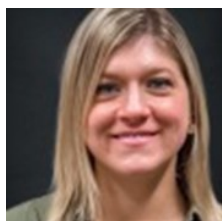


According to a new [CAI](#) survey, nearly 90% of respondents who live in a community association say they have engaged with their neighbors during the [COVID-19 pandemic](#). How have residents supported each other? Running small errands, helping with grocery shopping, and picking up prescriptions ranked among the top ways neighbors are keeping each other stay safe and healthy during these challenging times. Residents also report organizing activities to provide joy and levity during the pandemic.

Being an engaged resident is important for the well-being of a community. More than 60% of respondents say they volunteer on their homeowners association’s board, and nearly 50% participate in social events and recreational activities organized by residents.

How well do you know your neighbors? CAI’s survey found that close to 60% say they know their neighbors very well. Additionally, an overwhelming 90% of respondents believe they are a good neighbor, citing being caring, helpful, and respectful as characteristics that contribute to an overall healthy community.

## About the Author



*Laura Otto is editor of CAI’s award-winning Community Manager. A seasoned journalist, Laura previously worked for a creative, advocacy agency in Washington, D.C., where she wrote and edited content for a variety of public health clients. Prior to that, Laura served as a senior writer and editor for the George Washington University School of Medicine and Health Sciences. Laura is a graduate of Temple University in Philadelphia.*

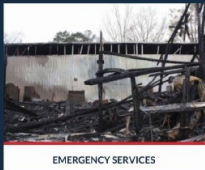




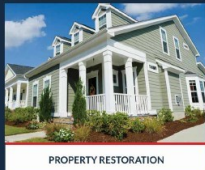
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## MODEL CODE OF ETHICS

CAI developed the Model Code of Ethics for Community Association Board Members to encourage the thoughtful consideration of ethical standards for community leaders. The model code is not meant to address every potential ethical dilemma but is offered as a basic framework that can be modified and adopted by any common-interest community.

### Model Code of Ethics for Community Association Board Members

#### Board members should:

1. Strive at all times to serve the best interests of the association as a whole regardless of their personal interests.
2. Use sound judgment to make the best possible business decisions for the association, taking into consideration all available information, circumstances and resources.
3. Act within the boundaries of their authority as defined by law and the governing documents of the association.
4. Provide opportunities for residents to comment on decisions facing the association.
5. Perform their duties without bias for or against any individual or group of owners or non-owner residents.
6. Disclose personal or professional relationships with any company or individual who has or is seeking to have a business relationship with the association.
7. Conduct open, fair and well-publicized elections.
8. Always speak with one voice, supporting all duly adopted board decisions—even if the board member was in the minority regarding actions that may not have obtained unanimous consent.

#### Board members should not:

1. Reveal confidential information provided by contractors or share information with those bidding for association contracts unless specifically authorized by the board.
2. Make unauthorized promises to a contractor or bidder.
3. Advocate or support any action or activity that violates a law or regulatory requirement.
4. Use their positions or decision-making authority for personal gain or to seek advantage over another owner or non-owner resident.
5. Spend unauthorized association funds for their own personal use or benefit.
6. Accept any gifts—directly or indirectly—from owners, residents, contractors or suppliers.
7. Misrepresent known facts in any issue involving association business.
8. Divulge personal information about any association owner, resident or employee that was obtained in the performance of board duties.
9. Make personal attacks on colleagues, staff or residents.
10. Harass, threaten or attempt through any means to control or instill fear in any board member, owner, resident, employee or contractor.
11. Reveal to any owner, resident or other third party the discussions, decisions and comments made at any meeting of the board properly closed or held in executive session.

# HOMEOWNER ASSOCIATION GUIDELINES

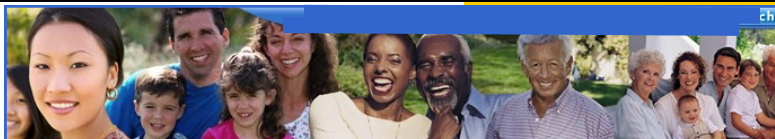
Many residents – owners and renters alike—don't really understand the fundamental nature of homeowner associations. Many others, including the media and government officials, lack a true understanding of the homeowner association concept.

**What is the basic function of a homeowner association? What are the essential obligations and expectations of homeowners? What are the core principles that should guide association leaders?**

- 1. Associations ensure that the collective rights and interests of homeowners are respected and preserved.**
- 2. Associations are the most local form of representative democracy, with leaders elected by their neighbors to govern in the best interest of all residents.**
- 3. Associations provide services and amenities to residents, protect property values and meet the established expectations of homeowners.**
- 4. Associations succeed when they cultivate a true sense of community, active homeowner involvement and a culture of building consensus.**
- 5. Association homeowners have the right to elect their community leaders and to use the democratic process to determine the policies that will protect their investments.**
- 6. Association homeowners choose where to live and accept a contractual responsibility to abide by established policies and meet their financial obligations to the association.**
- 7. Association leaders protect the community's financial health by using established management practices and sound business principles.**
- 8. Association leaders have a legal and ethical obligation to adhere to the association's governing documents and abide by all applicable laws.**
- 9. Association leaders seek an effective balance between the preferences of individual residents and the collective rights of homeowners.**
- 10. Association leaders and residents should be reasonable, flexible and open to the possibility—and benefits—of compromise.**

## EVENTS CALENDAR

*Mark yours today!*



### 2021 CALENDAR OF EVENTS

Due to growing health concerns with the COVID-19 virus the Board of Directors has decided to postpone **all in-person** CAI San Antonio events until further notice. "Our top priority is the health of our members and feel that it is best to err on the side of caution." Virtual meetings may be scheduled instead.

#### **JANUARY**

1/12/21 - Luncheon Meeting

#### **FEBRUARY**

2/26/21 - Golf Tournament

#### **MARCH**

3/9/21 - Luncheon Meeting

#### **APRIL**

4/8 - 4/10 - M100

4/13/21 - Luncheon Meeting

#### **MAY**

5/11/21 - Luncheon Meeting

#### **JUNE**

6/4 - M-202

6/8/21 - Luncheon Meeting

#### **JULY**

7/8- 9/21 - M-206

7/13/21 - Luncheon Meeting

#### **AUGUST**

8/27/21 - CA DAY

#### **SEPTEMBER**

9/14/21 - Luncheon Meeting

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#### **NOVEMBER**

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# Legal Assessments

## Contributing Writers:

Elliott Cappuccio, Adrian Coronado, and Ryan Quiroz

### Property Association's Right to Prohibit Short Term Rentals

**JBrice Holdings v. Wilcrest Walk Townhomes Ass'n, NO. 14-17-00790-CV (Tex. App. Aug. 18, 2020)**

JBrice Holdings LLC ("JBrice") owns two townhome units in Wilcrest Walk Townhome subdivision, governed by Wilcrest Walk Townhome Association, Inc. (the "Association"). JBrice rents each townhome through a short-term vacation rental service. The Association sent a cease and desist letter to JBrice alleging that the short-term rental usage violated the Association's Declaration of Covenants, Conditions and Restrictions (the "Declaration").

In response to the cease and desist letter, JBrice sued the Association, seeking a declaratory judgment that the short-term rental use does not violate the Association's Declaration. The Association counter-sued, claiming that JBrice breached the Declaration by violating the provisions related to residential use, nuisance, and annoyance, and the Association's Rules and Regulations. The Association sought to enjoin JBrice and requested attorney's fees. Both JBrice and the Association then filed competing Motions for Partial Summary Judgment.

Before the trial court ruled on the competing motions, the Association adopted amended rules explicitly prohibiting short term rentals (the "Amended Rules"). Shortly thereafter JBrice amended its petition, claiming that the Association's newly adopted Amended Rules are void and unenforceable.

The trial court granted the Association's Motion for Partial Summary Judgment and impliedly denied JBrice's Motion, finding that JBrice breached the Association's governing

documents "by renting for short terms" and then it called the case to trial to decide the remaining issues. Following the trial, the court incorporated its summary judgment rulings, granted the Association an injunction against JBrice's short-term rental activities, and awarded attorney's fees to the Association.

JBrice then filed an appeal. The court of appeals affirmed the trial court's judgment in favor of the Association, finding that the Texas Property Code specifically grants the Association the authority to create rules regulating the use of townhomes, not just the common areas within a townhome development. The court of appeals court upheld the trial court's judgment that the Association's rules were valid, upheld the permanent injunction against hotel and short-term rental use, and upheld the award of attorney's fees to the Association.

### About the Authors

*Elliott Cappuccio is the partner in charge of the Property Owner Association Section at the law firm of Pulman, Cappuccio & Pullen, LLP ("PC&P"), along with Senior Counsel Adrian Coronado, and Associate Ryan Quiroz. PC&P is a full service "Preeminent" Rated law firm with offices in San Antonio, Fort Worth, Austin, and McAllen. This article is not intended to provide legal advice, nor is it intended to create an attorney/client relationship between PC&P and the reader. If you have specific legal questions, you may contact Elliott Cappuccio at (210) 222-9494 or [ecappuccio@pulmanlaw.com](mailto:ecappuccio@pulmanlaw.com).*





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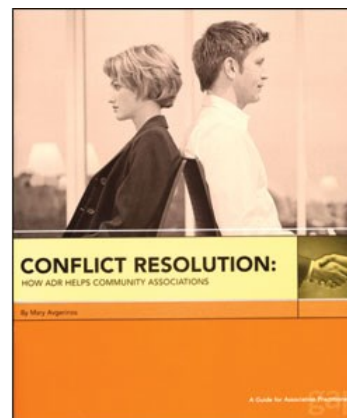


## **Conflict Resolution**

Community associations must resolve conflict through a constructive, people-centered strategy. To reach that goal, many communities turn to alternative dispute resolution and consensus building to foster greater understanding and improve communication. These alternatives to the traditional justice system have been embraced by attorneys, judges, and an increasing number of community associations not only because they are far less costly, but because they promote harmony rather than discord among neighbors..

Item #5869.

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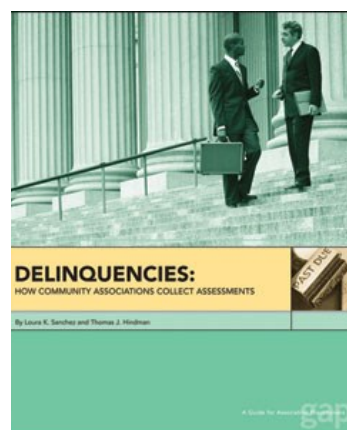


## **Delinquencies**

What authority does a community association have for collecting assessments? What should collections policies cover and what procedures should an association follow to collect delinquencies? What practical and legal remedies are available to associations to collect delinquencies? Find out how to document your case in court and how to meet the most common defenses delinquent owners use. This guide will help you minimize loss to the association when owners file bankruptcy and explain how the Fair Debt Collection Practices Act can effect the association when they file.

Item #0185

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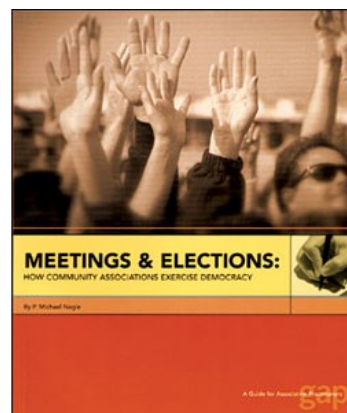


## **Meetings & Elections**

CAI's standard reference for meetings and elections addresses how technology has changed the way community associations conduct business. How far can an association go in giving notice electronically? When and how are electronic ballots used, and are they always legal? Can a proxy be emailed to the association? Also includes information on quorums, parliamentary procedures, organizing and implementing elections, and a great checklist of election procedures. .

Item #0796.

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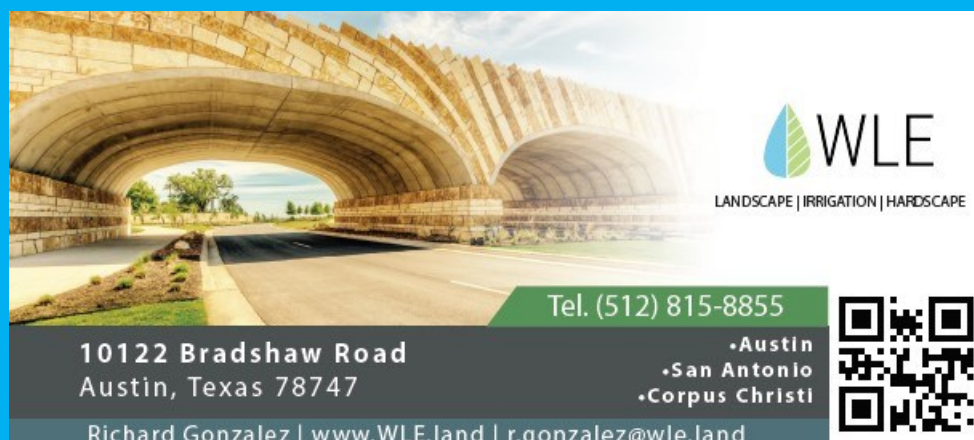




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# Texas Community Associations

## facts & figures

» Approximately **4,010,000** Texans live in **1,530,000** homes in **19,900** community associations.

» These residents pay **\$5.4 billion** a year to maintain their communities. These costs would otherwise fall to the local government.



» **137,000** Texans are elected to their community association boards each year, providing **\$112 million** in service.

» Homes in community associations are generally valued at least **5-6%\*** more than other homes.

» By **2040** the community association housing model is expected to become the most common form of housing.





**88** percent say their association's rules protect and enhance property values (66%) or have a neutral effect (22%); only 8% say the rules harm property values.

**70** percent of residents oppose additional regulation of community associations.

**85** percent of residents rate their community association experience as positive (56%) or neutral (29%).

4.6.18

 Community associations are private entities, not governments. Residents vote for fellow homeowners to provide leadership—making decisions about operation, administration and governance of the community.

 Assessments paid by association members cover the costs of conducting association business—such as common area maintenance, repair and replacement, essential services, routine operations, insurance, landscaping, facilities maintenance as well as savings for future needs.

CAI supports public policy that recognizes the rights of homeowners and promotes the self-governance of community associations—affording associations the ability to operate efficiently and protect the investment owners make in their homes and communities.



www.caionline.org  
(888) 224-4321

@CAIAdvocacy

#### SOURCES

Community Associations Fact Book 2016.

HOA Sweet HOA: 2016 Homeowner Satisfaction Survey.

Community Next: 2020 And Beyond, 2017.

foundation.caionline.org

\*Agan, A. & Tabarrok, A. (2005). What are private governments worth. *Regulation*, 28 (3), 14-17.





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## 2021 SPONSORSHIP OVERVIEW

CAI San Antonio is proud to present its 2021 Sponsorship Package. The goal is to provide an a la carte system of sponsorships which will provide the chapter with a strong foundation of support for general chapter functions and provide higher level CAI San Antonio sponsors the opportunity to select specific chapter activities to support. CAI San Antonio survived 2020 and will thrive in 2021 with your help. Thank you for your ongoing support of the chapter.

\*\*\* If you remain at the same Diamond, Platinum or Gold Sponsorship Levels or move up a level you can take 10% off your 2021 Sponsorship Level's cost.

Example: \$4000 - \$400 (10%) = \$3600

\*\*\* If you pledged money towards CA Day, Education or Membership in 2020, you may use 50% of those pledges on 2021 programs in the same category.

2020 CA Day = Golf Tournament, Education = Education and Membership = Membership. TCAA money was used.

All donations collected from the Friendship, Bronze, and Silver donation levels will provide general funding to the CAI San Antonio chapter. This includes basic financial support of:

1. individual committees,
2. educational opportunities such as the monthly luncheons programs,
3. advocating on behalf of our members before the Texas Legislature and the United States Congress, and
4. other needs of the chapter addressed in the annual budget.

Donations collected to achieve Gold, Platinum, and Diamond donation levels will provide additional funding support for 2021 CA Day, Membership, Education, TCAA and the Golf Tournament. Cost for booths, tables, and/or tickets to events will be provided separately by the respective committee.

### COMMITTEE OVERVIEWS

Donations received for specific committees will be utilized for that committee's needs, unless otherwise deemed appropriate by the Board of Directors to reallocate funds per the CAI San Antonio Bylaws. The chapter will honor all donation levels at all events and functions. Specific donations may or may not be recognized separately.

#### CA DAY

CAI San Antonio's CA Day strives to provide a perfect balance of education and networking opportunities for community volunteer leaders, community managers, business partners, and other professional organizations related to the community association industry. This event is free to community volunteer leaders and community managers. (Cost of exhibitor tables will be provided by the CA Day Committee later.)

#### GOLF TOURNAMENT

The Golf Tournament is a new event for the CAI San Antonio chapter, held to celebrate getting together again as managers, volunteers, and business partners to have fun and network. The Golf Tournament will be one of the most highly anticipated NEW CAI San Antonio events of the year.

#### MEMBERSHIP

Membership growth and retention is vital to maintaining a healthy CAI chapter. This committee strengthens the CAI San Antonio chapter through promotion of membership benefits and by furthering CAI San Antonio chapter's mission statement. (Cost for specific membership events will be provided by the committee later.)

#### TEXAS COMMUNITY ASSOCIATION ADVOCATES (TCAA)





CAI of San Antonio

## Sponsorship Program

Advocacy is one vital pillar of the San Antonio Chapter of CAI's Mission Statement. Without the efforts of TCAA's paid advocacy team that functions on-site in Austin, full-time during legislative sessions, we may not have been able to preserve the right of our Texas associations to self-govern on issues like fining, chickens, display of religious items, collections, foreclosure, and state oversight. TCAA's on-site advocacy team is its single largest investment in the future of our Texas community associations. There is never an off year when it comes to fundraising for TCAA. Without appropriate funding to TCAA, legislation designed to create a solution for an individual constituent complaint will be the future. Owners, volunteer board members, management companies, and the business partners that serve Texas community associations will experience the financial and unbalanced effects of individualized legislation. TCAA encourages you to invest in the preservation of your right to self-govern your community.

## EDUCATION

Our Education Committee provides our members with education, tools, and resources by developing, promoting, and presenting education programs for community association volunteers, community managers and business partners both virtually and in-person. The goal of this Committee is to provide enhanced knowledge and professionalism in the industry.

## 2021 SPONSORSHIP LEVELS

Your 2021 sponsorship level will be determined by your overall donation amount. The following donation levels provide general budgetary support for the CAI San Antonio Chapter:

**CAI San Antonio Friendship** Donation - You may enter any amount that you choose between \$100.00 and \$599.00 to support your CAI San Antonio chapter.

**Bronze** - Minimum donation of \$600.00 to support your CAI San Antonio Chapter

**Silver** - Minimum donation of \$1,200.00 to support your CAI San Antonio Chapter

\*\*\*These higher donation levels MUST include "Add-On Donations" as indicated on the Sponsor Application to reach the required minimum donation for that level:

**Gold** - Donations must total at least \$2,000.00 (\$1,200.00 Silver Level + \$800.00 in optional add-on donations)

**Platinum** - Donations must total at least \$3,000.00 (\$1,200.00 Silver Level + \$1,800.00 in optional add-on donations)

**Diamond** - Donations must total at least \$4,000.00 (\$1,200.00 Silver Level + \$2,800.00 in optional add-on donations)

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CAI of San Antonio

Sponsorship Program

### **DIAMOND LEVEL SPONSOR - MINIMUM \$4,000.00 DONATION**

(\$1,200.00 Silver Level (required) + \$2,800.00 in optional add-on donations)

#### **Benefits:**

- One (1) free regularly sized booth or table at all CAI San Antonio functions, booth, and table upgrade options available, except the Golf Tournament
- Ability to pre-register for all events two (2) weeks in advance of normal registration
- Two (2) free luncheon tickets to all regularly scheduled luncheons (when in-person events resume)
- Opportunity to provide marketing material on the Business Partner Venue Table at all regularly scheduled luncheons (when in-person events resume)
- CAI San Antonio Annual Meeting sponsor
- Luncheon sponsor of two (2) regularly scheduled luncheons (virtual and/or in-person)-includes:
- \$100.00 in gift cards given in business partner's honor by CAI San Antonio
- Opportunity to present business information to attendees for maximum of two (2) minutes at the beginning of each event.
- Recognition on the CAI SA slideshow under Diamond level, viewed at all luncheons and events
- Company logo included in slideshow at CAI San Antonio luncheons and CA Day,
- Free submission of one (1) featured article in Common Terra - article to be written by business partner
- Free full-page advertisement in four (4) issues of Common Terra
- Link on the CAI San Antonio website homepage to your company website (Logos N Links)
- Special Diamond Level name badges for up to two (2) representatives

### **PLATINUM LEVEL SPONSOR - MINIMUM \$3,000.00 DONATION**

(\$1,200.00 Silver Level (required) + \$1,800.00 in optional add-on donations)

#### **Benefits:**

- 50% off one (1) regularly sized booth or table at all CAI San Antonio functions, booth, and table upgrade options available, except the Golf Tournament.
- Ability to pre-register for all events two (2) weeks in advance of normal registration
- Two (2) free luncheon tickets to six (6) regularly scheduled luncheons (when in-person events resume)
- 50% off an additional two (2) luncheon tickets at any two (2) regularly scheduled luncheons (when in-person events resume)
- Opportunity to provide marketing material on the Business Partner Venue Table at all regularly scheduled luncheons (when in-person events resume)
- CAI San Antonio Annual Meeting sponsor
- Luncheon sponsor of one (1) regularly scheduled luncheon - includes:
- \$100.00 in gift cards given in business partner's honor by CAI San Antonio
- Opportunity to present business information to attendees for maximum of two (2) minutes (when in-person events resume)
- Recognition on the CAI SA slideshow under Platinum level, viewed at all luncheons and events
- Company logo included in slideshow at CAI San Antonio luncheons and CA Day.
- Free submission of one (1) featured article in Common Terra - article to be written by business partner
- Free half (1/2) page advertisement in four (4) issues of Common Terra
- Link on the CAI San Antonio website homepage to your company website (Logos N Links)
- Special Platinum Level name badges for up to two (2) representatives



CAI of San Antonio

Sponsorship Program

### **GOLD LEVEL SPONSOR - MINIMUM \$2,000 DONATION**

(\$1,200.00 Silver Level (required) + \$800.00 in optional add-on donations)

#### **Benefits:**

- 25% off one (1) regularly sized booth or table at all CAI San Antonio functions, booth, and table upgrade options available except the Golf Tournament
- Two (2) free luncheon tickets to four (4) regularly scheduled luncheons (when in-person events resume)
- 50% off an additional two (2) luncheon tickets at any two (2) regularly scheduled luncheons (when in-person events resume)
- Opportunity to provide marketing material on the Business Partner Venue Table at all regularly scheduled luncheons (when in-person events resume)
- Recognition on the CAI SA slideshow under Gold level, viewed at all luncheons and events
- Company logo included in slideshow at CAI San Antonio luncheons and CA Day.
- Free submission of one (1) featured article in Common Terra - article to be written by business partner
- Free quarter (1/4) page advertisement in four (4) issues of Common Terra
- Link on the CAI San Antonio website homepage to your company website (Logos N Links)
- Special Gold Level name badge for one (1) representative

### **SILVER LEVEL SPONSOR - MINIMUM \$1,200 DONATION**

#### **Benefits:**

- Ability to upgrade to Gold, Platinum, and Diamond levels
- Two (2) free luncheon tickets to two (2) regularly scheduled luncheons (when in-person events resume)
- Opportunity to provide marketing material on the Business Partner Venue
- Table at all regularly scheduled luncheons (when in-person events resume)
- Recognition on the CAI SA slideshow under Silver level, viewed at all luncheons and events
- Company logo included in slideshow at CAI San Antonio luncheons and CA Day
- Free business card size advertisement in three (3) issues of Common Terra
- Link on the CAI San Antonio website homepage to your company website (Logos N Links)
- Special Silver Level name badge for one (1) representative

### **BRONZE LEVEL SPONSOR - MINIMUM \$600 DONATION**

#### **Benefits:**

- One (1) free luncheon ticket to one (1) regularly scheduled luncheon (when in-person events resume)
- Opportunity to provide marketing material on the Business Partner Venue
- Table at all regularly scheduled luncheons (when in-person events resume)
- Recognition on the CAI SA slideshow under Bronze level, viewed at all luncheons and events
- Company logo included in slideshow at CAI San Antonio luncheons and CA Day
- Free business card size advertisement in two (2) issues of Common Terra
- Link on the CAI San Antonio website homepage to your company website (Logos N Links)
- Special Bronze Level name badge for one (1) representative

### **FRIENDSHIP LEVEL SPONSOR - MINIMUM \$100/MAXIMUM \$599 DONATION**

#### **Benefits:**

- Free business card size advertisement in two (2) issues of Common Terra
- Link on the CAI San Antonio website homepage to your company website (Logos N Links)



# professionalism and community managers



Community managers are the professional backbone of the community associations they serve, providing expertise that is crucial to the successful operation of homeowners associations, condominiums, cooperatives and other planned communities.

Many communities contract with association management firms for specific services. Others hire full-time, on-site managers.

Successful managers must possess knowledge and skills relating to association governance, financial and facilities management, communications, insurance, maintenance and much more.

Many of the most successful managers elevate their expertise and careers by taking advantage of CAI's Professional Management Development Program, which includes 17 expert-led courses that address the many facets of community management—including professional ethics.



Professionals who want to expand their knowledge and further accelerate their careers can earn the following credentials:

- Certified Manager of Community Associations (CMCA®)
- Association Management Specialist (AMS®)
- Professional Community Association Manager (PCAM®)
- Large-Scale Manager (LSM®)

Companies that meet specified professional requirements can earn CAI's Accredited Association Management Company (AAMC®) credential.

These individual and corporate credentials tell community association boards and homeowners that they are supported by managers with high standards of professional excellence.



Learn more:

- » **PMDP courses:** [www.caionline.org/pmdp](http://www.caionline.org/pmdp)
- » **Professional credentials:** [www.caionline.org/credentials](http://www.caionline.org/credentials)
- » **CAI benefits for managers:** [www.caionline.org/managerbenefits](http://www.caionline.org/managerbenefits)

# the homeowners we serve



Homeowners are CAI's largest member group, comprising more than 40 percent of our 32,000-plus members. For the most part, these are the homeowners who have chosen to be leaders in their communities—serving on association boards and committees or volunteering for special projects. Some simply rely on CAI to stay informed about how their communities should be governed and managed.

CAI strives to serve homeowners who have or probably will step up to the plate to serve their communities and fellow residents. The benefits we provide to them—from *Common Ground* magazine and our specialized newsletters to web content and educational opportunities—are developed for these leaders.



While we do provide information for all HOA residents—including our online course, *An Introduction to Community Association Living*—our focus is on community associations and those who lead them, especially the more than two million residents who serve on association boards and committees. By supporting community leaders, we are making communities preferred places to live for all residents.

Our primary mission is to help homeowner leaders and professional community managers protect property values, preserve the character of their communities and meet the established expectations of all residents.

Our education inspires effective governance and management. Our best practices help leaders build and sustain more harmonious communities. Our advocacy promotes practical legislative and regulatory policies. Our ethics guidelines inspire fairness, transparency and integrity.



That's how we serve all community association residents, even as we strive to preserve and enhance the concept, perception and value of common-interest communities.

- » **About CAI:** [www.caionline.org/about](http://www.caionline.org/about)
- » **Member Benefits:** [www.caionline.org/homeownerleaders](http://www.caionline.org/homeownerleaders)
- » **Find a chapter:** [www.caionline.org/chapters](http://www.caionline.org/chapters)
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# Community Associations

## Making Neighborhoods Stronger Across Texas

### What Is TCAA and who are its supporters?

Texas Community Association Advocates, (TCAA) is the public policy voice of community associations and the professionals who serve them.

#### Our supporters are united by a common mission:

To ensure that Texas community associations function properly for the benefit of all residents, that property values are protected and that community associations are well governed and properly managed to serve homeowners across Texas.

We are the voice for millions of Texas homeowners who choose to live in community associations and want to preserve the value of their home—the greatest asset most Texans will ever purchase in their lifetime.

We believe in responsibility and involvement in working together with public officials on public policy and working to find common ground to benefit homeowners and protect the quality of life of Texas neighborhoods.



## What is a community association?

HOAs, POAs, and Condominium Associations are non-profit associations which deliver services that were once the exclusive responsibility of local government. For many single-family communities these include street paving, lighting, pools, parks, trails, entry ways, recreational areas and many other services. HOAs also provide protection against neighborhood deterioration such as abandoned cars, dilapidated homes or yards that are not maintained.

In past generations, the city probably had a city park with a municipal swimming pool and community center where events were held. Often this is no longer the case. For the last several decades, municipalities have shed these responsibilities and costs by requiring developers of new communities to provide services once funded by cities. Most owners choose to live in these communities to give their families first-rate schools, swimming pools, tennis courts, playgrounds and other amenities many could not afford on their own.



# Community Associations

Making Neighborhoods Stronger Across Texas

Texas Community Association Advocates (TCAA) is the public policy voice of community associations and the professionals who serve them.

## TCAA Priorities For Neighborhoods

- Champion transparency and openness for community associations
- Provide educational resources to ensure volunteer board members, HOA professionals and others are trained about Texas laws
- Teach best practices in operating community associations
- Support protecting our environment through energy efficient practices



Our supporters are united by a common mission: To ensure that Texas community associations function properly for the benefit of all residents, that property values are protected and that community associations are well governed and properly managed to serve homeowners across Texas.

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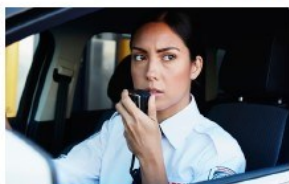


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# Welcome New Members

## New Members – 4<sup>th</sup> Quarter 2020

### Managers

Claire Basilio, CCMC  
Ann Saenz, Magnolia Property Management, Inc.

### Management Companies

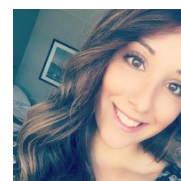
None

### Business Partner

None

### Volunteer/Homeowner

Mike Arnold, Alamo Ranch Property Owners Association  
Sheria Cole, San Antonio Oak Crest  
Tom Hirte, Alamo Ranch Property Owners Association  
Margaret Genzer, Cypress Cove Maintenance Association  
David Lowe, Cypress Cove Maintenance Association  
Pat Matheny, Cypress Cove Maintenance Association  
Penny McGrath, San Antonio Oak Crest



**Membership Chair**

**Amaris Lozano**  
[alozano@ccmcnet.com](mailto:alozano@ccmcnet.com)

*“CAI offers several  
membership  
opportunities with  
appropriate  
member benefits  
and resources for  
them all.”*

**Use the services  
of  
CAI Members.  
It Matters!!**



The Membership Committee extends a warm welcome to our new members. If you know someone who may be interested in joining the San Antonio Chapter of CAI, please have them contact Amaris so that he can provide the information they need to join.

**Join Now — [CAIONLINE.ORG](http://CAIONLINE.ORG)**

CAI offers several membership opportunities. Go to [CAIonline.org](http://CAIonline.org) to learn more about member benefits and resources. Your membership total includes membership dues, a mandatory advocacy support fee and an optional donation to the Foundation for Community Association Research.



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- 🌿 Best Landscapes proudly serves many home owners associations, as well as commercial & residential customers.
- 🌿 For HOAs, we offer forced mow services and welcome special projects.



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## CAI of San Antonio *Luncheon Program*

2<sup>nd</sup> Tuesday of Every Month

11:30 – 1:00 p.m.

RSVP Until Tuesday, One Week Before—[ced@caisa.org](mailto:ced@caisa.org)

Luncheons will be held via virtual webinar due to  
the coronavirus pandemic

CAI of San Antonio



### 2021 Board of Directors

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**Education**

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**Golf Tournament**

Jesse Trevino

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Amaris Lozano

**Nominating**

Lynn Harmon

**Sponsorship**

Lynn Harmon

**Social Media**

Bethany Vuyk

**TCAA & Legislative**

Leah K. Burton & Paul Gaines

# about Community Associations Institute

## Building Better Communities



Founded in 1973, CAI and its 59 U.S. and international chapters provide information, education and resources to the homeowner leaders and professionals who govern and manage homeowners associations, condominium communities and cooperatives. CAI's 32,000-plus members include community association board members, other homeowner leaders, community managers, association management firms and other professionals who support common-interest communities.

CAI serves associations by:

- Advancing excellence through seminars, workshops, conferences and education programs
- Publishing the largest collection of resources available on community association management and governance
- Advocating on behalf of community associations and their residents before legislatures, regulatory bodies and the courts
- Conducting research and serving as an international clearinghouse for information, innovations and best practices

CAI believes community associations should strive to exceed the expectations of their residents. Our mission is to inspire professionalism, effective leadership and responsible citizenship, ideals that are reflected in communities that are preferred places to call home.

Visit [www.caionline.org](http://www.caionline.org) or call (888) 224-4321.

