

# Common Terra

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

Second Quarter 2022

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## THE HOW-TOS OF ACC

By Cliff Davis and Teddy Holtz, ROBERTS MARKEL WEINBERG BUTLER HAILEY PC

Spring is here and, after hours of inspiration from watching Fixer Upper, homeowners are ready to begin adding on or remodeling the exterior of their homes. On top of that, the recent severe storms have led to many having unexpected repairs and owners might take the opportunity to do the full-scale remodel they have been dreaming of for years. But how can a property owners association (POA) ensure that owners do not move forward with a remodel or addition that is a detriment to the community? For answers, POAs, their board and community managers should turn to their restrictive covenants and architectural control guidelines.

### What are Architectural Control Guidelines?

An association's deed restrictions often lay the framework for the look and requirements of the homes in the neighborhood, but as time goes on, many specific issues may not have been contemplated during the initial phase of development or in the POA's restrictions. These issues can be addressed through architectural control guidelines. If the developer did not institute guidelines during its period of

(Cont. on page 6)

## THE MISSING LINK

By Lisa Tonnar, CMCA, AMS

If you've been a community manager for any amount of time, chances are good that you understand the basics: customer service, board reporting and preparation, property inspections and communication. However, there is an often overlooked basic that will either set you up for success or continue to stress you out into failure. What is this missing link? Accounting.

### Be prepared... It isn't just for scouts!

When a board or homeowner asks you why a certain expense is higher or lower than budget and you reply with "I'll look into that" you've lost some credibility. Before you walk into a meeting with your board, make sure you have a copy of your manager's report. This should include your latest Variance Report, Balance Sheet, Income

(Cont. on page 10)



## 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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**Cassie Thompson**

Community Manager  
Hill Country Retreat  
President, CAI San Antonio

*"I want to sincerely thank everyone that attended the Gala to support our Chapter. There is an incredible amount of work involved in producing the Awards Gala and we simply could not have done it without our Awards Gala Committee."*



## The President's Message —

We have done it folks! A team of CAI San Antonio Chapter Board Members, including myself, held our first "official" Luncheon in Corpus Christi, TX. Thank you to the CAI Business Partners and Community Managers that also came down to support us for this event!



We had a great turnout of local industry professionals while learning about "The Importance of a Structural Assessment" presented by Mr. David V. Day. Due to the overwhelming response to this luncheon, we plan to return to Corpus Christi in the near future and host a social event — keep an eye out for more information.

I was sad to have missed the 2022 Awards Gala, from the photos it appeared everyone had an amazing time. Shoutout and a BIG congratulations to Ms. **Brenda Tate**, CCMC, for winning the Dee McGee Award, what a huge accomplishment! And Kudos to all the other awardees:

**Arthur Downey**

Homeowner Volunteer of the Year  
**Stone Mountain Owners Association**

Medium Community Association

**Fossil Springs Ranch**

Large Community Association

**Hidden Trails Community Association**

Extra Large Community Association

**Stone Oak POA**

Mega Community Association

**Jenee Lewis**, CMCA, CCMC

On-Site Community Manager

**Brandi Brack**, CMCA, C.I.A. Services, Inc.

Portfolio Community Manager

Committee Certificates

**Lucy Filipowicz**, Cavalry Construction, Co-Chair CA Day

**Jenee Lewis**, CMCA, CCMC, Chair Golf Committee and Gala Committee

And finally, the President's Award this year went to **Jesus Azanza**, Chapter Executive Director.

I want to sincerely thank everyone that attended the Gala to support our Chapter. There is an incredible amount of work involved in producing the Awards Gala and we simply could not have done it without our Awards Gala Committee — THANK YOU!

I look forward to more in-person events so I can see everyone's happy faces. Please keep an eye out for announcements on future events. Have a wonderful Spring!

**Cassie Thompson**

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# AWARDS GALA



# The How-Tos of ACC

Cont. from page 1)

control, then the POA should consider adopting a set of guidelines. These guidelines provide owners with information such as the approved colors of exterior paint, fence requirements, landscaping requirements, the overall topography of the properties in the neighborhood and more. The guidelines should not create, amend or remove existing restrictive covenants. But they may help clarify and/or explain certain restrictions for the homeowners. If your association does not have a set of guidelines in place or needs its current set of guidelines amended, you should consult with your POA's legal counsel to create or amend the set of guidelines to best correspond to the restrictions in the community.

## Should You Have an Architectural Control Committee?

The deed restrictions in the majority of POAs require approval of the architectural control committee (ACC) before owners may construct new improvements or make modifications to existing improvements. To ensure a smooth process, POAs should create an application that requires the owner to provide details on the proposed improvements including materials to be used, paint colors, if paint is being used, and a detailed drawing of the proposed modification and its location on the property. To affect a more efficient process, the application should be readily available to owners via the POA's website and/or included in the ACC guidelines, which would offer additional details on the process and procedures. Following the 87<sup>th</sup> Texas Legislative Session, the state has new requirements for the ACC. Now, for single-family POAs with more than 40 lots and not during the development period, the POA is required to have an ACC committee separate from the Board. Also, a person serving on the ACC cannot be a current Board member's spouse or a person residing in a current Board member's residence.

## The Approval Process and Violations

Once the application reaches the ACC committee, the committee should move to respond to the ap-

plication quickly. Many deed restrictions contain an automatic approval provision for any application not approved or denied within thirty (30) days of the committee receiving the application and thus the applications are deemed approved. These types of provisions are in place to protect owners from unreasonable delays in the construction process, but the provision can make it difficult for the POA to take action if the process is not handled properly. Once the application is deemed approved it becomes extremely difficult, if not impossible, to require the owner to comply with the restrictions of the POA. This could create a snowball effect where other owners attempt to construct modifications and improvements of a similar aesthetic and issues regarding waiver and abandonment of the restrictions may arise.

Once an application is received, it is important for the Board or the committee to not wait for the full 30 days to respond, especially for applications that lack information on the proposed construction. By waiting the full 30 days, the committee may open itself to allegations of unreasonable delays. The committee should quickly deny the application and respond to the owner to provide more information. On rare occasions, an application that would normally be denied may require a variance from the POA. A variance should only be granted if the restrictions give the POA specific authority to grant the variance, and these types of requests should be limited to situations where there is a hardship due to the particular nature of the property. A POA that allows too many variances may also open itself up to allegations of waiver and abandonment of its restrictions. If you have questions as to whether your POA can allow variances and if the situation warrants a variance, please consult your POA's legal counsel. In the event the POA does grant a variance, if required, the POA's legal counsel can ensure the variance is filed properly in the real property records.

(Cont. on page 7)



# The How-Tos of ACC

(Cont. from page 6)

After approving or denying an application, the POA should monitor the property for which the application was submitted to prevent unapproved or modified construction. In several instances, we have seen POAs wait to take action against unapproved construction. In those circumstances, judges and juries are less likely to require an owner to undo or remove the construction in the interest of preventing waste. Compliance actions should be taken as soon as possible before the time, labor, money and materials expended by the owner become an issue. During the process of construction, a modification to the submitted design may become necessary. In these circumstances, the owner should follow the ACC guidelines, which may include resubmitting an application for approval, and the Board or committee should work with the owner to ensure the request for modification is processed timely and compliant with the guidelines and restrictions of the POA.

In the event of a denial, an owner is allowed by statute to appeal a decision by the architectural review committee to the Board. If the owner wishes to have a hearing about the denial before the Board, the Board must hold the hearing within thirty (30) days after the date the board receives the owner's request. Be advised, the Property Code allows extensions (in certain circumstances) regarding the date the hearing is held.

In extreme circumstances, it may be necessary for the POA's legal counsel to become involved. The attorney may need to send a cease-and-desist letter to the owner, and in more egregious situations, file a temporary restraining order against the owner to halt construction.

## Responding to Homeowners with Delinquent Fines or Assessments

For some applications, the Board or ACC

committee may run into a situation where the applying owner is delinquent in the payment of fines and/or assessments. Currently, there is no precedent in case law or statute in which to guide a POA in its response. In the event of an application from an owner with delinquent fines or assessments, the POA should look to its governing documents for clarity. If there is a provision in the POA's governing documents that allows the Board or ACC committee to deny the application based on delinquent fines or assessments, then the Association may do so. If there is no such provision in the governing documents, then the Board or ACC committee should consider the application based only on the POA's restrictions and ACC guidelines.

The architectural review process is an important function of any POA. It ensures owners are able to make modifications and improvements to their property while abiding by the restrictions of the POA. By maintaining a smooth architectural review process, the POA can ensure compliance is maintained and property values continue to increase for years to come.

## About the Authors



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*Owners Association Law by the Texas Board of Legal Specialization.*



*Teddy Holtz is a Shareholder in RMWBH's Community Association Law Section. He works collectively with RMWBH Associates in the Property Owner's Association Section to oversee all stages of compliance and collection actions from the pre-litigation stages to post-judgment decisions. Teddy advises associations of all sizes from 8-unit town-*

*homes to master-planned communities with over 10,000 lots on corporate matters and will attend board meetings and annual member meetings on behalf of clients.*



## WHAT COMPONENTS ARE INCLUDED IN A RESERVE STUDY? By Reserve Advisors



When it comes to a building or home, the entire structure is only as strong as its foundation. Similarly, when it comes to planning for your community's future, the scope of work, or component inventory, serves as the foundation for a reserve study provider to conduct a thorough review of your property. Only then can recommendations that meet the needs of your association be delivered.

Prior to beginning the reserve study, associations should provide their reserve study consultant with a copy of their community's governing documents, which lay out the components that the association is responsible for. These documents serve as a starting point for developing the component inventory or scope of work. The reserve study provider, through conversations with community management and the board, will also take into account historical practices to determine which components should fall within the scope of work and, thus, be funded through reserves.

Community Associations Institute's (CAI) National Reserve Study Standards establishes which components are included in a reserve study. Each component must meet all parts of a four-part test in order to be classified as a reserve component, and therefore be funded by reserves.

The first test is perhaps the most simple – the expense of maintaining a component must be the **financial responsibility of the association**. Though there are components that universally exist from one association to the next, no two associa-

tions necessarily maintain the same components. Thus, governing documents serve as a starting point for evaluating which components are the responsibility of your association.

The second test ensures that only those components with a **limited useful life expectancy** are considered a reserve expense. Components that have extended useful lives may not have a predictable useful life or their replacement occurs outside the 30-year scope of the reserve study. The operating budget should fund infrequent repairs to such items. [Learn more about long-lived components here.](#)

Test number three requires that a reserve component must have a **predictable remaining useful life expectancy**. This test rules out any capital expenditure that would be unpredictable. Future expenditures need to be anticipated within reason and planned for in order to be included in the reserve study.

The fourth and final test rules out any capital expenditures that fall below a **minimum threshold cost**. Expenses that fall below a minimum threshold are readily addressed through the annual operating budget. Furthermore, prioritizing capital projects and managing a reserve fund budget is more efficient when it is void of small projects better suited for the operating budget. Here lies much variation from association to association as a Board might treat the maintenance and replacement of certain components through the operating budget in lieu of the reserve account. For example, a small 6-unit condominium might fund the replacement of mailbox stations through reserve funds as it is, relatively, a large expense. Whereas a 100-unit condominium might fund the replacement through the operating budget, as it is a relatively small expense to them (as it relates to their overall budget).

While reserve components are the focus of reserve studies, other elements may be included in the study if the association so chooses. It is critical to work with your reserve study provider to ensure the scope of work takes into account historical practices and the discretion of the board when developing the component inventory

# Rights and Responsibilities for Better Communities

## *Principles for Homeowners*

### **Homeowners have the right to:**

- ◇ A responsive and competent community association.
- ◇ Honest, fair and respectful treatment by community leaders and managers.
- ◇ Participate in governing the community association by attending meetings, serving on committees and standing for election.
- ◇ Access appropriate association books and records.
- ◇ Prudent expenditure of fees and other assessments.
- ◇ Live in a community where the property is maintained according to established standards.
- ◇ Fair treatment regarding financial and other association obligations, including the opportunity to discuss payment plans and options with the association before foreclosure is initiated.
- ◇ Receive all documents that address rules and regulations governing the community association—if not prior to purchase and settlement by a real estate agent or attorney, then upon joining the community.
- ◇ Appeal to appropriate community leaders those decisions affecting non-routine financial responsibilities or property rights.

### **Homeowners have the responsibility to:**

- ◇ Read and comply with the governing documents of the community.
- ◇ Maintain their property according to established standards.
- ◇ Treat association leaders honestly and with respect.
- ◇ Vote in community elections and on other issues.
- ◇ Pay association assessments and charges on time.
- ◇ Contact association leaders or managers, if necessary, to discuss financial obligations and alternative payment arrangements.
- ◇ Request reconsideration of material decisions that personally affect them.
- ◇ Provide current contact information to association leaders or managers to help ensure they receive information from the community.
- ◇ Ensure that those who reside on their property (e.g., tenants, relatives and friends) adhere to all rules and regulations.



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).

## THE MISSING LINK

(Cont. from page 1)

Statement and General Ledger. Woah! Just lost a few of you. Buckle up, this is really pretty easy! Let's take this one step at a time. It'll help you to read this with a copy of your statements printed out to reference. Remember to breathe! You can always read this again and build your knowledge from here.

### **Oh Accounting, why do we hate you so?**

Say the word "accounting" and watch CAMs get hives and their eyeballs roll to the back of their heads. Why? Because someone didn't explain it properly! As a CAM, you don't have to know which accounts require credits or debits, what you need to know are the basics. For this article, I will stick to common accounting knowledge. More advanced accounting lingo and knowledge will come with time and practice.

### **There's a list!!! (General Ledger)**

The first report you should print when reviewing financials is your General Ledger (GL). This is a complete list of everything that was done in each account for the period. The second report which you should have on-hand is your budget. For any questions regarding what is showing on your balance sheet or Income Statement (or Profit & Loss (P&L) you will need to reference one, or both, of these reports.

### **Strike a Pose, got the picture? (Balance Sheet)**

The Balance sheet is the first report you should review. The balance sheet is a picture of the financial position of the association at a given period (usually the last day of the month). When reading a Balance Sheet, you will see your Assets, then Liabilities and finally Equity as you move down. The first column will be your current period, second column is the prior period and the third column is your Change between the two. The first thing to look at (every single time!) is to make sure that your Assets are equal to your Liabilities plus your Equity. If the total is off, you'll need to alert your accountant since something has been recorded out of balance. Next, look at your bank accounts. Does anything look odd about how much money was paid from the accounts or deposited into the accounts? For instance, in that detail, do you see any payments to companies you don't recognize? if you have a monthly transfer from your operating account to fund your reserves, was that transfer made? Then glance through your bank account General Ledger bank account and asset accounts detail. (1000-1999 accounts). Do you

see anything that looks odd? If so, you'll need to question it. What is a common example of a problem? Is there a transfer made from an account that you weren't aware of? Ask what it was and note it on your variance report. Is there a large deposit in an account where you wouldn't expect one? Accountants make mistakes (gasp!) They do. If you have a large deposit into your reserve account (or another unusual account for a deposit), ask what it was. It could have been money that should have been deposited into your operating account. Also, look at how much your operating balance decreased in a month (the change between last month and this month) If you used that amount of money again, how many months of money to pay bills would you have left? Will you have enough to get through the year? If you look like you may run low, reduce expenses that are not absolutely necessary. Are you unsure how to calculate this? Ask your accounting contact or another CAM to show you. No one wants to get to the end of the year and have their CAM surprise them with the fact that they don't have enough money to pay bills. The sooner you notice a potential issue, the easier it is to adjust expenses or know if you'll have to take another course of action (funds transfer, developer funding request, etc.)

### **We can bring home the bacon, fry it up in the pan... and never let you forget we are CAMs! (Income Statement)**

Income Statements or Profit and Loss (P&L) only shows the associations Revenue/Income and Expenses. If you had more Revenue than Expenses, you will have a Net Profit. (This is the GOAL) If you have less Revenue than Expenses, you have a Net Loss. You want to look for variances to budget of over/under \$1000 or 10% for smaller communities and expenses.

**To credit or debit, that is the question.** Why you gotta make it so complicated? When you see adjustments that need to be made to an account, don't get wrapped around the wheel about asking to debit or credit an account. Keep it simple. Increase or decrease. If you need to add an expense, just ask your accounting contact to add it. Don't worry about crediting or debiting, your accountant will know what to do.

(Cont. on page 11)



# THE MISSING LINK

Cont. from page 10)

## How to prepare a Variance Report

Everyone sweats the variance report. Don't! This is your opportunity to shine. Don't make the mistake of regurgitating the financials, the board can read them. Now that you know the steps above, completing the variance report correctly is easy with a little practice. Set up the format to mirror your balance sheet and financials. For the balance sheet, list your bank account chart of account numbers (1000-1650 or whatever range your bank accounts show as on your balance sheet). Then put in the total Operating Funds, Total Reserve Funds, Any due/to and due from. Explain any large uses or deposits. For your Assessments Receivable, note in your comments how much you collected during the period (ex. A/R decreased by XXX this period) There is no need to restate the entire balance sheet. Note anything else that is unusual and what was done.

Move onto your financial statements. List your income accounts (4000-4999) Put in your total income from the period, in the second column put in your total budget for income the period. Third column should be your variance (if you don't have this column add it or put your variance in the comments.) If your revenue variance is higher than the budget, highlight the variance in green (shows good to budget) or in red if your revenue was less than budget. This is a quick read for a not-so-accounting savvy board to know if revenue is better or less than budgeted at a glance. Then in comments, detail revenue over or less than the \$1000 or 10% rule of thumb and everything you know about the variance.

Once you've completed revenues, move to your expenses. Detail each type of expense category like: Administration 5000-5036, Utilities 6000-6055 etc. Input the monthly actual for each category of expense, monthly budget for each category of expense, and the variance for each category of expense. You will do this just like you did for revenues, except you will highlight expenses less than budget in green and more than budget in red. Remember it this way, you WANT more revenue, so more revenue than budget is good (green). You want LESS expenses, so expenses less than budget are green. By detailing out the detail of why you are over or under, this will show a

board member the answer to their question before they would ask the question. Remember, the answers are all in the general ledger! You can also go back and look at the invoices you see in the general ledger for more information. When reviewing your financials with the board or homeowners, keep a copy of your variance report and state those items when you get to the appropriate section. This shows the board you know your stuff and you will look great!

## Year to-date Notes

You may want to consider adding a YTD Notes as an extra page to your variance report. For large variances add something like: 6100 Landscaping Contract – March - \$2k under budget due to saving on mulching expense. You can then continue to add any other large expenses to the YTD Notes for any other months of the year. This is easy to do and will remind you throughout the year of the large variances so that you don't have to search through prior months of variance reports.

## That's IT?!?!

That's it! Keep practicing and keeping good notes. You will find that accounting isn't that hard after all.

## About the Author



*Lisa Tonnar is currently a Community Association Manager working for Asso- cia – Principal Management Group of Houston. Lisa is a retired U.S. Navy Reserve Commander with 14 years of experience managing mid-rise luxury condominiums and homeowners associations. Additionally, Lisa served in hotel management and accounting for 17 years.*

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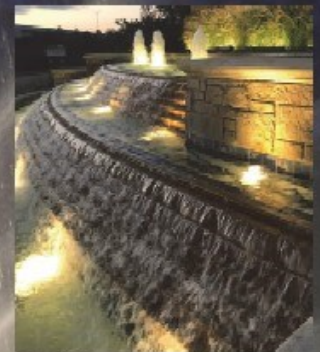
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## CED Corner



**Jesus Azanza**  
Chapter Executive Director

The CAI San Antonio Chapter has had a very active first quarter of 2022. We began on February 12th with an educational luncheon featuring Jeff Barnett of CIT bank, hosted an 80's themed Awards Gala, and ended with a trip to Corpus Christi. What makes our chapter unique is our ability to create meaningful connections for our membership and we are ecstatic to offer so many ways for our industry to lean on one another.

Combined, we were successful in engaging and recognizing hundreds of members and re-introducing events that have been on hold since the start of the COVID-19 pandemic. Many of you may not be aware that Corpus Christi falls under the umbrella of our Chapter. In fact, our coverage area stretches to the Rio Grande Valley — that means our potential membership base and needs are far greater than one might expect.

To meet the growing demand for education, networking, and representation in markets outside of San

Antonio, we are in the process of developing outreach programs and encourage you to consider joining us on a future road trip!

On June 24, 2022, we will make our first trip to McAllen, TX for an educational luncheon at the Chase Tower (200 S 10th St, McAllen, TX 78501). Presenters are being secured and we anticipate a great turnout — I hope to see you there!

It's safe to say there is no shortage of events or opportunities to experience fun while expanding your community association knowledge at either the CAI local or national level. In fact, next month CAI National will host their annual conference in Orlando, FL between May 4 - 7. This three-day event features hundreds of exhibitors and thousands of attendees from all over the country — what's more fun than that? Whether you are an industry veteran or just starting out, CAI offers countless opportunities to expand your network.

If you are interested in getting more involved, please reach out to me and I would be more than happy to tell you more!

Enjoy the warmer weather and have a very Happy Easter!

**Jesus**



### 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."*

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## LABOR AND SUPPLY CHAIN SHORTAGES, INSURANCE INCREASES CREATE CHALLENGES FOR HOAS

By Laura Otto

For more than two years, community associations have navigated challenges from the COVID-19 pandemic including decisions on wearing face masks, requiring vaccines, reopening amenities, and social distancing. Now, labor and supply chain shortages, inflation, higher insurance premiums, and rising gas prices are creating new challenges for community association leaders.

“Between government mandated restrictions, severe labor shortages, ongoing supply chain problems, gas hikes, and dramatic community-wide usage increases, associations are having to pay substantially more to maintain their community at a level similar to before the pandemic,” says Sara J. Ross, an attorney at Chadwick, Washington, Moriarty, Elmore & Bunn in Fairfax, Va., and chair-elect of CAL’s Business Partners Council.

Depending on a community association’s authority to increase assessments, some of Ross’ association clients are having to decrease the level of service in some areas to meet their budget or find creative ways to reduce costs and/or increase income. For example, an association may reduce the number of trash pickup days to keep the costs to a level that assessments can support, or a condominium may institute a preventative maintenance program to reduce water bills, she explains.

Landscapers also are feeling the pinch at the pump because much of their equipment is gasoline powered, according to Ross’s landscaping business partners. The increase in gas prices would cause a landscaping company’s transportation expenses, as well as the actual landscaping work expenses to go up, explains Ross. “In addition, the rising fuel prices will eat at their bottom line if their contracts were not drafted to allow them to pass those increases onto their clients. And if they can pass those costs on, it may result in the loss of clients who cannot afford the increase,” she notes.

“Some associations are dramatically raising their assessments to keep up with the higher expenses. However they choose to address the increases, they are facing significant political fallout with the membership,” Ross adds.

Community associations also are facing reduced access to preferred insurance carriers, particularly those in Western U.S. states contending with losses due to wildfires. Adjustments and increases to property replacement costs are causing premiums to increase 15% at a minimum, explains Michael Berg, CMCA, CIRMS, CEO and president of Berg Insurance Agency in California. “In addition, some communities are finding they cannot secure coverage to 100% of the replacement costs of the community,” he adds.

The issues insurance carriers in California are facing won’t change anytime soon, according to Berg. “Carriers will continue to reevaluate their exposure to property loss. I do hope, however, that carriers will implement underwriting practices that will allow them to consider more risk than they are currently,” he says.

This would create a new challenge for a community association, because “not only will it need to support the high premium, but it also will need to absorb costs of property improvements to meet carrier qualifications. For example, communities will need to address defensible space when possible and need to fireproof their buildings with improvements like eave enclosures and chimney cap replacements. These could be large expenses on their own,” he adds.

### About the Author



Laura Otto is editor of CAL’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.





## TEXAS LEGISLATIVE ACTION COMMITTEE Community Associations Institute



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# WE WANT YOU ON OUR TEAM!

There is a new advocacy committee in town and **WE WANT YOU ON OUR TEAM!** The mission of the Texas Legislative Action Committee (TLAC) is simple – to advance, defend, protect, and strengthen public policy for the community association-housing model.

In order to be successful, we need to hear from Community Board Members, Community Managers, and those who are directly affected by HOA and condominium association policy reform. We want to know what issues matter to you, what are changes you would like to see during the next legislative session, and how can TLAC help your association operate more effectively.

- ★ TLAC is CAI's brand new advocacy organization and is the only group in Texas supported and endorsed by both CAI National and all CAI Chapters in Texas.
- ★ TLAC is a separate organization from the Texas Community Association Advocates (TCAA).
- ★ TLAC represents over 20,000 community associations and 5.6 million homeowners in Texas.
- ★ TLAC is governed by a broad group of delegates from all over Texas with varying levels of experience and expertise.
- ★ TLAC is focused on making education, transparency, and information available to managers, management companies and homeowners PRIOR to and DURING the legislative session.
- ★ **TLAC is requesting all community associations contribute \$1 per door to help raise funds to support ongoing legislative efforts. Any contribution helps, but our success in Austin relies on everyone chipping in!**
- ★ If you're interested in getting involved, our industry needs your help! TLAC is recruiting volunteers to serve on its committees!

## HOW CAN YOU HELP?



Sign up for the TLAC email list



Read and share TLAC information with other HOA associates



Contribute \$1 per door in your community to help raise funds for TLAC

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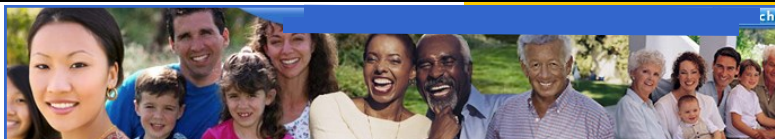
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# EVENTS CALENDAR

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## 2022 CALENDAR OF EVENTS

*In response to the COVID-19 virus, the Board of Directors has decided to evaluate the health and safety impact of in-person CAI San Antonio Chapter events on a case-by-case basis. Our top priority is the well-being of our members and as a result, meetings are subject to format changes, sometimes on very short notice. Every effort will be made to communicate schedule and location changes in advance. Thank you for your understanding!*

### **APRIL**

4/12/2022 – Educational Luncheon - Moving Membership Meetings from the Real World to the Virtual World (Canyon Springs Golf Club)

4/30/2022 - Board Leader Development Workshop (Virtual)

### **MAY**

5/7/2022 - CAI Annual Conference & Exposition - Orlando, FL

5/10/2022 - Networking Event (Location TBD) - San Antonio, TX

### **JUNE**

6/14/2022 - Educational Luncheon - Water Rights - Charles Porter, Ph.D (Location TBD)


6/24/2022 - Educational Luncheon (Rio Grande Valley) - Chase Tower, 200 S 10th St, McAllen, TX 78501


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# Legal Assessments

## Contributing Writers:

Elliott Cappuccio, Dominique Valenzuela  
and Ryan Quiroz Pulman, Cappuccio & Pullen, LLP

### Amending Association Governing Documents &

#### Volunteer Immunity

**Andrea Arnold v. Randy Addison, Randy Denton, Don Maulsby, Patricia Brown, Robert J. Bruns, Guy Dixon, and Cambridge Place at Preston Trail Homeowners Association, No. 05-20-00001-CV (Tex. App.—Dallas December 17, 2021)**

This case has a long and somewhat complicated history. This is just a brief summary of the primary issues. In 2013, the Cambridge Place at Preston Trail Homeowners' Association (the "**Association**") began considering amendments to its governing documents. In 2016, the board began distributing proposed CCR and bylaw amendments to the association members. The board notified members that a vote on the proposed amendments was scheduled for the annual meeting on February 22, 2017, and proxy forms were distributed to the members. The proxy form to vote on the CCR amendment identified the board secretary, Mary Chaffin, as the proxy to vote for that particular ballot item. Another proxy form was provided by which members could appoint a proxy to vote on the other ballot items.

At the annual meeting, quorum was met but Mary Chaffin was not present. The board president proposed extending the vote to allow Mary Chaffin to cast the proxy votes at a later special meeting. A motion to adjourn the meeting was made and seconded, and the members in attendance voted to adjourn the meeting. A couple weeks later, the Association reconvened to count the proxy votes, and the amended CCRs were approved and adopted by 69% of eligible voting members.

One member, Andrea Arnold, objected to how the vote was taken. Arnold eventually filed suit against current and past Association officers, alleging that they breached the Association's governing documents, and violated the Texas Residential Property Owners Protection Act ("TROPA") and Chapter 22 of the Texas Business Organization Code. Arnold also sought a declaratory judgment from the court that the prior CCRs were still in effect because, as she claimed, the vote counted at the annual meeting was insufficient to adopt the amendments and the members had no authority to continue the vote. The individual defendants moved to dismiss Arnold's claims under Texas Rule of Civil Procedure 91a, arguing that: (1) they were immune under federal and state statutes protecting volunteers; (2) TROPA does not provide right of action against fellow association members; (3) Arnold failed to prove the existence of a contract between herself and the individual defendants; and (4) Arnold could only bring a declaratory judgment claim against the Association, which was not a party to the case.

The parties later limited the motion to the declaratory

judgment claim, and the trial court granted the motion and dismissed the declaratory judgment claim against the individual defendants. Arnold then amended her lawsuit to include the Association as a defendant. In response, the Association filed a counterclaim seeking a declaration that the CCR amendment was valid. Arnold and the Association then filed cross-motions for summary judgment on their respective DECLARATORY judgment claims. The trial court denied Arnold's motion and granted the Association's motion.

The defendants then moved for summary judgment on Arnold's remaining claims. The trial court granted the defendants' motion, and eventually awarded attorney fees to the defendants. Arnold then appealed the trial court's ruling.

On appeal, Arnold argued that the vote to amend the CCRs was improper because it did not follow the precise manner provided in the original CCRs. Arnold argued that, according to the Original CCRs, an amendment is only approved and adopted upon the express written consent of at least 70% of eligible voters. However, the Dallas Court of Appeals pointed out that the 70% requirement is limited by section 209.0041(h) of the Texas Property Code, which permits an association to amend its governing documents with an approval of 67% eligible voters, or less if the association's CCRs lessen the requirement. Therefore, Section 209.0041(h) overrides any CCRs requiring a higher percentage to amend CCRs, and the Association only needed 67% of eligible voters to adopt the amended CCRs. The Dallas Court of Appeals also held that governing documents for this Association did not prevent them from adjourning and reconvening the meeting.

Arnold also challenged the immunity defense asserted by the Association's officers. Specifically, the officer defendants claimed they were immune from liability under both the federal Volunteer Protection Act of 1997 and the Texas Charitable Immunity and Liability Act. The Dallas Court of Appeals concluded that the officer defendants presented sufficient summary judgment evidence on their immunity defense and that Arnold failed to present sufficient evidence to raise a fact issue.

### 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 Associates Ryan Quiroz and Dominique Valenzuela. PC&P is a full service "Preeminent" Rated law firm with offices in San Antonio, Fort Worth, 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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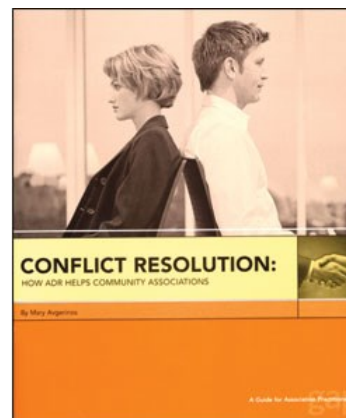


## Conflict Resolution

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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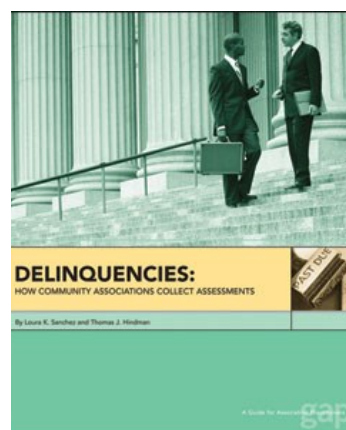


## Delinquencies

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

Nonmembers: \$30 | **CAI members: \$15**

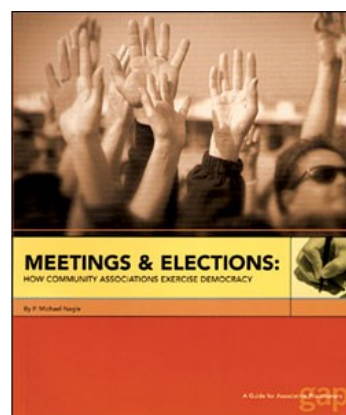


## Meetings & Elections

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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- 01** Matt has extensive Account Management knowledge in his 15+ years and he has have a passion for making things better than he found them so Reconstruction Experts is a great fit for him.
- 02** Matt lives in Live Oak and is looking to expand the footprint for Reconstruction Experts into the San Antonio market. Reconstruction Experts currently operates in four states including Dallas, Houston and Austin in Texas.
- 03** Matt is a huge dog lover, he owns two Rhodesian Ridgebacks, he rescues/ fosters through a non-profit called R.R.U.S. and has never met a dog he didn't want to meet.
- 04** Matt is a HUGE Iowa Hawkeye Football/Basketball/Wrestling fan as he's from Iowa, but please don't hold that against him y'all.
- 05** Matt just became co chair of the membership committee and he is looking forward to creating more opportunities with more members in the future for us all.

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# Texas Community Associations

## facts & figures

» Approximately **5,965,000** Texans live in **2,093,000** homes in more than **21,000** community associations.

» These residents pay **\$9.5 billion** a year to maintain their communities. These costs would otherwise fall to the local government.



» **201,000** Texans serve as volunteer leaders in their community associations each year, providing **\$182.7 million** in service.

» The median home value in Texas is **\$161,700**. Homes in community associations are generally valued at least **4%\*** 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%).


**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%).

**43** percent always or usually vote in national elections and 59% always or usually vote in local and state elections.

9.26.20

 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.



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#### SOURCES

Community Associations Fact Book 2019.  
Published by the Foundation for Community Association Research - [foundation.caionline.org](http://foundation.caionline.org). Note: Statistics published are estimates generated from seven public/private data sources; including the American Communities Survey.

Home Sweet HOA: 2020 Homeowner Satisfaction Survey.

Community Next: 2020 And Beyond, 2018.

\*Clark, W. & Freedman, M. (2019). The Rise and Effects of Homeowners Associations. *Journal of Urban Economics*, 112, 1-15.







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## Sponsorship Program



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- » Four (4) free tickets to the 2022 Annual Awards Gala - **NEW!**
- » Three (3) free tickets to all regularly scheduled luncheons - 50% off an additional three (3) luncheon tickets
- » Dedicated end-of-year Annual Sponsor networking event - **NEW!**
- » Free access to all CAI San Antonio networking events
- » Opportunity to provide marketing material on the Business Partner Venue Table at all regularly scheduled luncheons (does not include Annual Awards Gala or CA Day)
- » CAI San Antonio Annual Meeting Sponsor
- » Sponsorship of two (2) regularly scheduled luncheons - includes:
  - » \$100.00 in gift cards given in business partner's honor by CAI San Antonio at one (1) luncheon
  - » Opportunity to present business information to attendees for a maximum of two (2) minutes at one (1) luncheon

### ADVERTISING & MARKETING

- » Free full-page advertisement in four (4) issues of CommonTerra
- » Free submission of one (1) featured article in Common Terra
  - » Article to be written by sponsor
- » Logo and link on the CAI San Antonio website
- » Logo and link in e-newsletter

### DISCOUNTS & RECOGNITION

- » 20% off any additional sponsorship opportunities for the Annual Awards Gala and CA Day (does not include table at Annual Awards Gala or booth at CA Day) - **NEW!**
- » Distinguished Legacy Diamond Award to be presented at Annual Meeting - **NEW!**
- » Company logo included in slide show at CAI San Antonio luncheons, CA Day, and Annual Awards Gala (when available)
- » Recognition on the CAI SA banner under Diamond Level, viewed at all luncheons and events
- » Special Diamond Level name badges for up to two (2) representatives



## PLATINUM - \$3,000

### EVENTS

- » 50% off one (1) regularly sized booth at CA Day - **NEW!**
- » Two (2) free tickets to the 2022 Annual Awards Gala
- » Two (2) free tickets to all regularly scheduled luncheons – 50% off an additional two (2) luncheon tickets
- » Dedicated end-of-year Annual Sponsor networking event - **NEW!**
- » Free access to all CAI San Antonio networking events
- » Opportunity to provide marketing material on the Business Partner Venue Table at all regularly scheduled luncheons (does not include Annual Awards Gala or CA Day)
- » CAI San Antonio Annual Meeting Sponsor
- » Sponsorship of one (1) regularly scheduled luncheon - includes:
  - ▶ \$100.00 in gift cards given in business partner's honor by CAI San Antonio at one (1) luncheon
  - ▶ Opportunity to present business information to attendees for a maximum of two (2) minutes at one (1) luncheon

### ADVERTISING & MARKETING

- » Free half (1/2) page advertisement in four (4) issues of CommonTerra
- » Free submission of one (1) featured article in Common Terra
  - ▶ Article to be written by business partner
- » Logo and link on the CAI San Antonio website
- » Logo and link in e-newsletter

### DISCOUNTS & RECOGNITION

- » 15% off any additional sponsorship opportunities for the Annual Awards Gala and CA Day (does not include table at Annual Awards Gala or booth at CA Day) - **NEW!**
- » Recognition on the CAI SA banner under Platinum Level, viewed at all luncheons and events
- » Company logo included in slide show at CAI San Antonio luncheons, CA Day, and Annual Awards Gala (when available)
- » Special Platinum Level name badges for up to two (2) representatives





CAI of San Antonio

Sponsorship Program



## GOLD - \$2,000

### EVENTS

- » 25% off one (1) regularly sized booth at CA Day
- » One (1) free ticket to the 2022 Annual Awards Gala
- » One (1) free luncheon ticket to regularly scheduled luncheons - 50% off an additional one (1) luncheon ticket
- » Dedicated end-of-year Annual Sponsor networking event - **NEW!**
- » Free access to all CAI San Antonio networking events
- » Opportunity to provide marketing material on the Business Partner Venue Table at all regularly scheduled luncheons (does not include Annual Awards Gala or CA Day)

### ADVERTISING & MARKETING

- » Free half (1/4) page advertisement in four (4) issues of Common Terra
- » Free submission of one (1) featured article in Common Terra
  - » Article to be written by business partner
- » Logo and link on the CAI San Antonio website
- » Logo and link in e-newsletter

### DISCOUNTS & RECOGNITION

- » 10% off any additional sponsorship opportunities for the Annual Awards Gala and CA Day (does not include table at Annual Awards Gala or booth at CA Day) - **NEW!**
- » Recognition on the CAI SA banner under Gold Level, viewed at all luncheons and events
- » Company logo included in slide show at CAI San Antonio luncheons, CA Day, and Annual Awards Gala (when available)
- » Special Gold Level name badges for up to one (1) representative



## SILVER - \$1,200

### EVENTS

- » One (1) free ticket to regularly scheduled luncheons
- » Opportunity to provide marketing material on the Business Partner Venue Table at all regularly schedule luncheons
- » Free access to all CAI San Antonio networking events

### ADVERTISING & MARKETING

- » Free business card size advertisement in four (4) issues of CommonTerra
- » Free submission of one (1) featured article in Common Terra
  - » Article to be written by business partner
- » Company name and link on the CAI San Antonio website
- » Company name and link in e-newsletter

### DISCOUNTS & RECOGNITION

- » Ability to upgrade to Gold, Platinum and Diamond levels
- » Recognition on the CAI San Antonio banner under Silver Level, viewed at all luncheons and events
- » Company logo included in slide show at CAI San Antonio luncheons, CA Day and Awards Gala (when available)
- » Special Silver level name badge for one (1) representative



CAI of San Antonio

Sponsorship Program



## MANAGEMENT COMPANY - \$3,000 NEW!

*\*\* Management Companies can purchase ANY sponsorship level but only Management Companies can purchase the Management Company sponsorship.*

### EVENTS

- » 50% off one (1) free regularly sized booth at CA Day
- » Two (2) free tickets to the 2022 Annual Awards Gala
- » Ten (10) free luncheon tickets to all regularly scheduled luncheons
- » Dedicated end-of-year Premium Partner networking event
- » Free access to all CAI San Antonio networking events
- » Opportunity to provide marketing material on the Business Partner Venue Table at all regularly scheduled luncheons (does not include Annual Awards Gala or CA Day)
- » 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 at one (1) luncheon
  - » Opportunity to present business information to attendees for a maximum of two (2) minutes at one (1) luncheon

### ADVERTISING & MARKETING

- » Free half (1/2) page advertisement in four (4) issues of CommonTerra
- » Free submission of one (1) featured article in Common Terra
  - » Article to be written by business partner
- » Logo and link on the CAI San Antonio website
- » Logo and link in e-newsletter

### DISCOUNTS & RECOGNITION

- » 15% off any additional sponsorship opportunities for the Annual Awards Gala and CA Day (does not include table at Annual Awards Gala or booth at CA Day)
- » Recognition on the CAI SA banner under Platinum Level, viewed at all luncheons and events
- » Company logo included in slide show at CAI San Antonio luncheons, CA Day, and Annual Awards Gala (when available)
- » Special Management Company Sponsorship level name badges for up to two (2) representatives



# 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)
- » **Join CAI:** [www.caionline.org/join](http://www.caionline.org/join)





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# Welcome New Members



## New Members – 1<sup>st</sup> Quarter 2022

### Managers

Venus Agueros - CCMC - TX  
 Lisa Chenoa Allen - Twin Dolphins Homeowners Association  
 Lexi Bachran - Great Northwest CIA  
 Marijah Coughran - CCMC - TX  
 Shadana La'Ray Chancellor-Hurd - Preferred Association Management Company  
 Gayle Connolly  
 Renee Ford  
 NormaT Garcia  
 Anthony Holland  
 Beth James - CCMC – TX  
 Heather Jurgenson – Associa Hill Country-Round Rock  
 Natalie Lewis - Associa Hill Country - San Antonio  
 Keila O. Lynch  
 Gail M. Smith

### Business Partners

LiftMaster - Chamberlain Group – Scott Higginbotham  
 New Era Towing – Barbara J. Perales  
 Reconstruction Experts – Matt Pullin  
 Resi Comm Roofing – John George  
 Security Reconnaissance Team – Bryan Bunch  
 Vantaca, LLC – Maegan Woytek

### Volunteer/Homeowner

Richard Butler	Ryan Mainard
Brenda J Egnor	John McKendrick
Ed Gerber	Nick Sanchez
Jim Hall	Tim Skvarenina
Diane Harms	James Watson
Dana Krone	

### Membership Co-Chairs

Jena Abernathy  
 Matt Pullin

*“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.





## 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 either in-person or  
virtually as determined by the CAI-SA  
Board of Directors and Education Committee

CAI of San Antonio



### 2022 Board of Directors

**President**

Cassie Thompson

**President Elect**

Russell Birdy

**Vice President**

Art Downey

**Secretary**

Sabine Holton

**Treasurer**

Vacant

**Director**

Harmon Hamann

**Director**

Sonia Lopez

**Director**

Leah K. Burton

**Director**

Vacant

### COMMITTEE CHAIRS

**Awards Gala**

Stephen Martinez & Jenee Lewis

**CA Day**

Roxanne Jones & Jessica Ramirez

**Common Terra**

Art Downey

**Education**

Brady Ortego & Greg Cagle

**Golf Tournament**

Jenee Lewis

**Membership**

Jena Abernathy & Matt Pullin

**Nominating**

Denise Jimenez

**Sponsorship**

Suzanne Hubbard

**TLAC & Legislative**

Sonia Lopez

# 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.

