



Common Terra

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

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Fourth Quarter 2021

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Foreclosing on a Condo/HOA Member's Property

By: Harmon Hamann, INSURICA

Recovering delinquent fees and assessments from members of a condominium or homeowners association (HOA) can be a headache for the HOA's board. Each homeowner shares a piece of the association's operating costs; when they fail to pay their fees, it prevents the HOA from paying its bills for property maintenance, renovations and utilities in a timely manner, if at all.

If a certain percentage of members are behind in their payments, the significant revenue shortfall drives HOAs to take drastic measures to stay afloat. In some cases, HOAs may force other homeowners to pick up the slack and cover the disparity. In other cases, the HOA may pursue legal action—such as a civil lawsuit or a foreclosure—against delinquent homeowners to recoup the debt.

If your HOA chooses to pursue a foreclosure against a homeowner, consider the risks you might face, and take appropriate risk mitigation steps to limit your HOA's liability throughout the process.

Is Foreclosure the Best Option?

When an HOA forecloses on a homeowner's property, it will take—and usually sell or rent out—the property in repayment for the unpaid fees and assessments. Before pulling the trigger on a foreclosure, it's important to do preliminary research to ensure a foreclosure is the best and least risky option to recoup the debt.

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Electronic Voting for Property Owners Associations in Texas

By Marc Markel, ROBERTS MARKEL WEINBERG BUTLER HAILEY PC

In Texas, a community association's right to utilize electronic voting depends upon which sections of the Texas Property Code are applicable to that association. While the dedicatory instruments may address the method of voting, the Texas legislature has muddied the waters in some cases by adopting laws that can override these documents.

For condominium associations, the applicable provisions of the Texas Property Code are silent on the issue of electronic voting. Instead, condominium associations must rely on the provisions of their dedicatory instruments for this authority. While methods of voting are most often addressed in an association's bylaws, the issue will occasionally be discussed in the declaration or certificate of formation (sometimes called "articles of incorporation"). If a condominium association's dedicatory instruments do not allow for

(Continued 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 afford-

able 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.



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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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Leah K. Burton

Attorney, RMWBH PC
President, CAI San Antonio

“As we move into the fall and I look back at what our Chapter has accomplished in 2021, I am reminded of how immensely lucky we are to have members, sponsors, and volunteers who continue to support our organization.”



The President's Message —

It's an exciting time to be a CAI San Antonio Chapter member!

Since January, we have grown our membership and are close to eclipsing the 400-member mark. Reaching this milestone is a testament to the hard work from dedicated volunteers who work behind the scenes to create a Chapter worth belonging to.

To make the most of your membership, I strongly encourage you to get involved and participate in the activities of the Chapter. In August, many of you participated in CA Day and took advantage of the exceptional networking and educational opportunities. Despite COVID-19 concerns, CA Day safely brought together over 200 community association volunteers and professionals who navigated 38 exhibit booths while taking home prizes, information, and new connections. The success of this event relies heavily on the support of a cohesive group of committee members. I cannot express enough gratitude to Lucy Filipowicz, Cavalry Construction, and Roxanne Jones, Urban Dirt, for leading the CA Day committee and creating a memorable event. Plans for 2022 are already underway as we look for ways to make this event bigger and better than ever before — stay tuned!

As we move into the fall and I look back at what our Chapter has accomplished in 2021, I am reminded of how immensely lucky we are to have members, sponsors, and volunteers who continue to support our organization. As Chapter President, I have been fortunate to be a part of your leadership team — strategizing with Board Members who are on a constant quest to identify how we can best serve our members. Being a part of this group has been an experience I will never forget, and I encourage each of you to get engaged and consider how you can give back to the Chapter.

In November, we will hold our annual membership meeting and Board election. The Nominating Committee is hard at work identifying future leaders and soon you will receive a slate of candidates who we believe are best suited to help guide the Chapter for years to come. New this year, we are implementing an online Board election voting option for those who cannot make the annual membership meeting in person or who do not feel safe participating in live events. It is important that the Board maintains its diversity and has proper representation of the community associations industry to carry out all the Board of Directors responsibilities. Our Chapter's culture, policies, and procedures are what make us unique and have led to continued growth. If you have ever considered joining the CAI San Antonio leadership team or are curious as to what it takes to get involved, contact the Chapter office, or reach out to anyone on the Board. We would be glad to discuss any opportunity to increase membership engagement.

Looking ahead, I want you all to know that as I finish out my term as Chapter President and pass the torch to Cassie Thompson, Patriot HOA, you will be led by a dedicated member who has years of industry expertise and a deep understanding of CAI's core principles. I am confident in her ability and am excited to see her blossom in this new role.

Lastly, we serve an incredible industry with dedicated, professional people — on behalf of the Board of Directors, we thank you for allowing us to work beside and with you. To say we value your membership, is an understatement. Cheers....

Leah K. Burton
lbarton@RMWBH.com

UPCOMING CHAPTER EVENTS



2021 GOLF TOURNAMENT



October 8, 2021
11:00 am - 6:00 pm
Canyon Springs Golf Course
 24405 Wilderness Oaks
 San Antonio TX 78260

SAVE THE DATE

JANUARY 29, 2022
@ THE ESPEE



CAI SA PRESENTS:

NEON

rights

 JOIN US AS WE CELEBRATE THESE LAST TWO CRAZY YEARS 80'S & 90'S STYLE! SO DIG DEEP IN YOUR CLOSET AND DRESS TO IMPRESS! STAY TUNED, MORE DETAILS TO COME.

Foreclosing on a Condo/HOA Member's Property

(Cont. from page 1)

Refer to your HOA's governing documents: Your HOA's bylaws should dictate your right to foreclose. They may also provide information on how to place a lien on the property. A lien allows the HOA to sell the homeowner's property in order to repay overdue fees and assessments owed to the association; its purpose is to compel the homeowner to pay their debt. It's important to adhere to your association's governing documents.

Review your HOA's accounting and bookkeeping records: Were all the overdue fees and assessments properly levied in accordance with your HOA's bylaws? Keep in mind that the HOA could be sued by the homeowner if assessments were improperly imposed or fees were actually paid by the homeowner but not properly recorded.

Understand applicable state and federal laws: Debt collection and foreclosures are subject to state and federal laws based on the jurisdiction your HOA operates in. The laws regulate the following:

- The total amount of debt that the homeowner must accumulate before the HOA can start the foreclosure process
- The minimum length of time the homeowner must be delinquent in payments before the foreclosure process can be started
- The number of days' notice the HOA must give the delinquent homeowner to repay the debt before proceeding with the foreclosure process

To ensure you're in compliance with state and federal laws regarding debt collection, liens and foreclosure, consult a legal professional.

Obtain a report from the homeowner's title company: The homeowner also has rights, and the HOA board will want to understand his or her stake in the process. If the homeowner still resides on the property and has a considerable amount of equity in it, pressure from the HOA usually compels payment. However, there is also the risk that the homeowner will sue all involved after the foreclosure, even if your HOA executed it flawlessly.

How much equity does the homeowner have in the property? One way to figure this out is to obtain a comprehensive report from the title company. Knowing

how much equity the homeowner has in the property is a good indicator of how much he or she will fight to keep the home during the foreclosure process. A comprehensive report will include valuable information the HOA should consider before initiating the foreclosure process:

- The status of ad valorem taxes, tax suits or sales
- Mechanics liens
- Federal tax liens
- Foreclosure postings of prior liens
- Notices of bankruptcy, probate and divorce proceedings

The Foreclosure Process

Once you decide that a foreclosure is the best option to recover the unpaid fees and assessments, your HOA can start the foreclosure process. The steps listed below are a basic overview of the process, and may differ from state to state.

Apply for a lien: First, the HOA must apply for a Claim of Lien against the homeowner's property. What's important to know is that there may already be existing liens from other sources—such as tax liens and mortgage liens—that may affect how much you can collect when the property is foreclosed.

Notify the homeowner: After placing a lien on the property, the next step is to notify the homeowner about your plans to seek foreclosure. The homeowner is given a certain amount of time—depending on that particular state's requirements—to respond to the notice and repay the debt before the HOA can proceed with the foreclosure.

Judicial vs. nonjudicial foreclosure: After placing a lien on the property and giving the homeowner the proper notification, typically the HOA must then follow "judicial" foreclosure proceedings. A judicial proceeding means the HOA is required to obtain a court order to sell the homeowner's property. There are also "nonjudicial" proceedings, which allow an HOA to take the homeowner's property and sell it at an auction without a court order. Nonjudicial foreclosures are only allowed in certain states.

When to accept a repayment plan: At any time before the home is sold, the homeowner can stop the foreclosure process by paying all overdue, interest and legal fees owed to the HOA. In some cases, a homeowner

(Cont. on page 7)

Foreclosing.....

(Cont. from page 6)

er may want to work out a repayment plan with the HOA. You can choose to accommodate the homeowner, as long as you have the best interest of the rest of the association in mind. Before agreeing to a repayment plan, you may want to consult a legal professional.

Maintain Professionalism

Unpaid dues and abandoned or foreclosed homes can cause tension in an HOA community. While emotions may run high, it's important for the HOA board to maintain professionalism throughout the debt collection process. While it's important to treat all HOA members fairly, there isn't a one-size-fits-all approach for dealing with delinquent members. Your board may have to review and approach each case on an individual basis to determine what's best for the HOA's financial situation.

Be patient during the foreclosure process and double-check everything you do to make sure you're in compliance with state and federal laws and your HOA's bylaws. Expediency during the process could expose you to undue risks. For additional information about foreclosures and resources for other condo or HOA risks, contact INSURICA today.

About the Author

Harmon Hamann CIC, MPA



Harmon joined INSURICA in 2014, bringing extensive insurance and claims management experience with him. As a Commercial Insurance Producer, he works with risk management focused clients in the construction, energy, and manufacturing industries. Harmon's background makes him uniquely qualified to understand the risks that middle market businesses face.

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What Gives the Association the Right to Tell Me What to Do?

In a nutshell: the association declaration and state law.

Community associations have a governmental component. Like a city or county government, a community association has a *charter*—called the declaration. The declaration encompasses bylaws, covenants and other documents that give community associations their legal foundation.

These governing documents obligate the association to preserve and protect the assets of the community. To enable the board to meet this obligation, association governing documents also empower the board to make rules and define the process for adopting and enforcing them—within limits. Governing documents also establish parameters for the nature and type of rules the board can make.

State law gives associations the authority to make rules. These are called common interest community statutes, and they apply to condominiums, cooperatives, and property owners associations.

Remember, however, that the board can't make or enforce any rule that is contrary to the governing documents, local ordinances, state law or federal regulations. Remember also that the board make rules on your behalf—to protect your investment, your home.

Sign Me Up!

While serving on the board is probably the most visible example of volunteerism in our association, there are many other ways that you can contribute your time and talents to improving our community.

Your participation in the community is beneficial to you, your neighbors and the association. For example, common benefits gained by volunteering include:

- making a positive difference in other peoples' lives
- sharing or learning new skills
- boosting your resume—volunteer jobs are fair game
- meeting new people
- having fun

Don't let our community suffers from lack of enthusiasm. Even a few hours of your time can make a big difference in the culture of the community. Help us generate goodwill, encourage "paying it forward" and strengthen our community.

Annual Irrigation Checkups Save Water, Save Money!

In an effort to maximize year-round water conservation efforts, the San Antonio City Council passed a water conservation ordinance in 2006 with updates in 2009 and 2013 addressing a variety of water conservation opportunities.

One of the provisions included in the ordinance requires that Large or Large Use properties with in-ground irrigation systems submit an annual irrigation checkup to the San Antonio Water System Conservation Department by May 1 each year. Properties equal to or greater than 5 acres are defined by the ordinance as **Large Property**. Any property that uses 1 million gallons of water or more for irrigation purposes in a single calendar year is defined by the ordinance as **Large Use**.

This mandatory inspection ensures your irrigation system is operating without water waste and may identify opportunities to increase the efficiency of your system, saving you water and money!

To meet compliance, a licensed irrigator must perform an on-site inspection of the irrigation system, documenting that the system does not have ongoing leaks, any leaks found in the course of the inspection have been repaired, and that the system operation does not result in water waste.

Upon passing inspection, the licensed irrigator will complete the compliance process by submitting the SAWS Online Irrigation Checkup Form. The online submission ensures that SAWS Conservation has collected all required information, that the licensed irrigator has signed off that the irrigation system meets all regulations of the city ordinance, and that a compliance report is sent by email to the licensed irrigator, which then is provided to the property owner.

The checkup may also identify permanent irrigation design changes, including zone removal, converting beds from spray to drip irrigation, and pressure regulation. These system improvements not only reduce water consumption and the water

bill, they are also eligible for a SAWS Conservation irrigation design rebate.

Or maybe your system is no longer in use or you're just ready to kick the irrigation habit completely? Permanently disable the entire system to be cleared from the irrigation checkup requirement and receive a rebate between \$450 and \$5,000. Contact SAWS Conservation to schedule a required pre-inspection to qualify for the rebate by calling (210)704-7283(SAVE) or email us at Consult@saws.org.

If your property is required to comply, please keep in mind that failure to comply by May 1st now results in the assessment of an annual enforcement fee in the amount of \$153.00 and an additional volumetric rate of \$0.0969 per 100 gallons on all irrigation consumption on a monthly basis beginning after the May 1st deadline.

SAWS Conservation mailed courtesy notification letters in February to the billing address for each irrigation account required to comply with the city ordinance. For all inquiries regarding the SAWS Annual Irrigation Checkup program, and the submittal process for the Online Irrigation Checkup Form, please contact SAWS Conservation at 210-233-3443 or send an email to: irrigationcheckup@saws.org



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.

Electronic Voting for Property Owners Associations in Texas

(Cont. from page 1)

electronic voting it may be possible to amend the relevant document to permit it going forward. An association wishing to amend its dedicatory instruments should consult with an attorney to ensure that any such amendment is properly adopted.

Unlike condominium associations, single-family associations subject to Chapter 209 of the Texas Property Code have statutory authority to utilize electronic voting. Section 209.00592(a)(3) explicitly states that owners may cast their votes by electronic ballot. This provision controls over any contrary provision in the single-family association's dedicatory instruments. Section 209.00592 goes on to state that a single-family association is not required to provide an owner with more than one method of voting, provided owners are given the opportunity to vote either by proxy or by absentee ballot. As such, single-family associations are not *required* to utilize electronic voting but, if they choose to do so, owners must also be given the choice to vote either by absentee ballot or by proxy.

Section 209.00592 defines an electronic ballot as one that is given by e-mail, facsimile, or posted on an internet website. A single-family association utilizing electronic ballots must be able to confirm the identity of the property owner submitting the ballot, and property owners must receive a receipt of the electronic transmission and receipt of their ballot. When an electronic ballot is posted on a website, notice of the posting must be sent to each owner so that they know how to access the ballot and cast their vote. "Text to vote" applications that utilize a website-based format are becoming more popular. When using this option, the website should also be accessible to owners who wish to cast their vote using a computer instead of a phone.

Section 209.00592 specifies that electronic ballots may be counted towards quorum only for items appearing on the electronic ballot. Further, if an owner casts an electronic ballot and also shows up to vote in person, the in-person ballot controls over the electronic ballot. An electronic ballot cannot be counted if the motion presented for a vote is amended at the meeting such that the final language being voted on differs from the exact language contained in the electronic ballot. The only exception to this last rule is for a board of directors election where new candidates are nominated from the floor.

Single-family associations wishing to take advantage of the secret ballot process set forth in Section 209.0058 of the Texas Property Code should be aware that the statute allows a candidate in a board of directors election to name one person to observe the counting of the ballots. However,

that observer is not entitled to see the name of the person who cast any ballot. As such, the association could find itself in a position where it has to balance the requirement that the association be able to identify the person who cast an electronic ballot with the fact that the ballot may need to be tabulated in such a way that an observer cannot tell who cast the vote.

Finally, once a vote has been completed, all community associations should preserve copies of electronic ballots in a form that will allow the association to produce copies if necessary. Section 82.114 of the Texas Property Code specifically requires condominium associations to maintain copies of voting records. For single-family associations, there is a process by which property owners can request a recount, which would require the association to have access to the ballots that were cast. Additionally, associations are required to comply with court orders calling for the production of ballot records. Ideally, the records should be in a form that can be printed or reduced to a PDF in case it becomes necessary to redact any information contained therein.

Electronic voting can offer a way for more owners to participate in association votes, while also making it easier for associations to satisfy applicable quorum requirements. However, navigating the use of this technology in a manner that complies with the law can present challenges. Associations interested in utilizing electronic voting should consult with an attorney to ensure compliance with both the association's dedicatory instruments and applicable statutes.

About the Author



Marc Markel is one of Roberts Markel Weinberg Butler Hailey's founding shareholders. Marc has been practicing law for over forty years. He is experienced in handling all aspects of real estate transactions, litigation and community association representation. He is a charter fellow of the Community Association Institute's College of Community Association Lawyers (CCAL), and a fellow of the American College of Real Estate Lawyers (ACREL). Mr. Markel has authored master deed restrictions for numerous large residential, commercial, and mixed-use projects. He represents and defends community associations and their volunteers in litigation and frequently assists developers through their due diligence process and acquisition of title. His representation of developers, builders and associations involves litigation avoidance techniques in which he conducts a thorough risk analysis program. Mr. Markel is also a frequent speaker on real estate topics for various bar organizations and the Community Associations Institute.

Policies Bridge the Gap for POAs

By Sipra Boyd and Eric Tonsul, ROBERTS MARKEL WEINBERG BUTLER HAILEY PC

As a result of the 87th Texas Legislative Session, property owners associations (POA) should be considering consulting with their attorneys about ways to address the impact of the new laws on their governing documents and the potential need to modify existing, or adopt new, policies. This begs the question, what is a policy and how can it be used to assist in the governance of the POA with the other governing documents?

What is a POA Policy?

A policy is a dedicatory instrument that governs the establishment, maintenance, and operation of a POA. Policies are adopted by the POA's board of directors (board) and should be used to either clarify provisions or provide supplemental information, which may be absent in existing governing documents. Policies may take the form of rules and regulations, guidelines, and/or resolutions. A policy is generally a more topic-focused document, used to address specific areas of the POA, i.e., collections, parking, etc.

The Differences Between Policies, Bylaws and Restrictions

While reading this, some of you may be thinking isn't a policy redundant because the POA already has restrictions or other statutory authority? While policies may provide some redundancy, as mentioned above, policies are helpful in filling gaps and/or providing more clarity of provisions in existing documents. The authority to adopt a policy may stem from the governing documents or state law.

For example, the POA's restrictions may state that parking on the street is only allowed in certain sections of the association and for a "temporary period." Assuming the POA has the authority to adopt a policy (and/or rules and regulations), a policy could help outline the specific sections where parking on the street is allowed, define the term "temporary period," explain how violations are enforced, and other details to help clarify the provision in the restrictions. Additionally, if specifically authorized by statute, as required in Sec. 209.005 and Sec. 82.114 of the Texas Property Code, POAs may be required to adopt policies to comply with state law. For example, a POA's Open Records Policy provides details on the procedures for inspecting/copying the books and records, associated fees and other relevant information. Policies, such as these, assist residents with understanding their rights and obligations related to various aspects of community association living.

Policies may also differ from other controlling documents because of the feasibility of the board to address issues in the community that may not have previously existed or contemplated by aging restrictions. Policies typically require approval by a majority vote of a quorum of the directors on the board. Amending the restrictions to address new issues or clarify language in the restrictions requires at least a majority (or higher percentage) vote of the owners. Obtaining a majority (or higher percentage) vote of the owners can be very difficult and prevents a POA from addressing issues that may negatively impact property values without the ease and flexibility of adopting policies.

Why are policies important?

Policies are important to POAs because they assist in the enforcement of restrictions and protection of property values. If the POA has authority, Boards should consider adopting policies for the betterment of the community. Policies should be clear in their intent, not contradict the restrictions, and leave no room for guesswork on where the POA stands on the issue the policy addresses. With the 2021 Legislative Session bringing several changes that take effect on September 1st, POAs should consider adopting policies to maintain compliance with the law. POAs may need to amend existing policies or implement new policies that address the various issues modified by statute.

Boards should contact the POA's legal counsel with any questions regarding the POA's authority to address these legislative changes.

About the Authors

Eric Tonsul practices Residential and Commercial Real Estate Litigation, Corporate Law, and Community Association Law. He specializes in the representation of property owners associations with respect to corporate matters, collections and deed restriction enforcement.

Sipra Boyd joined the firm's Real Estate Section in 2012 bringing eight years of experience in representing community associations. Ms. Boyd represents single-family residential, condominium, and commercial community associations throughout Texas and her practice focuses on all aspects of Community Association Law. Ms. Boyd is a past president of the Greater Houston Chapter of the Community Associations Institute and serves as a member of the Legal Committee and a chair of the Business Partner Council.

ALLEN, STEIN ★ DURBIN

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The image features the Kraftsman logo, which is a circular emblem with the text "THE FUN BUILDERS" at the top, "KRAFTSMAN" in the center, and "KRAFTSMANPLAY.COM" at the bottom. Surrounding the logo are six circular photographs showing various playground equipment and water park structures. The bottom of the image is a dark blue banner with white text.

Kraftsman Commercial Playgrounds & Water Parks
800.451.4869 | www.kraftsmanplay.com

CED Corner



Jesus Azanza
Chapter Executive Director

I'm confident I speak for all CAI San Antonio Chapter members when I say goodbye 100+ degree summer days and welcome cooler fall nights! As the leaves start to change and the sun begins to set sooner, I'm excited for how our communities will come together through the rest of the year and eager to see all the spirit that surrounds the holiday season.

Our Chapter is always looking for ways to share our story and showcase members. This fall, I encourage you to share with us your trick-or-treat photos, pumpkin patches, Thanksgiving events, holiday lights, and anything else that sheds light on the positive impact community associations have on their neighborhoods.

As we finish out the year and begin strategizing for 2022, we are already planning for ways to create must-attend events. If you have an idea for an event or an educational topic you would like to see covered, please contact me or any of

the board members listed on the website; we need your ideas to keep this Chapter interesting and engaging.

Our commitment to you includes reinventing the Chapter's networking opportunities, improved communication with the membership, and promoting a wider sharing of institutional knowledge. To do this, we cannot be afraid to break the mold, to set aside our old ways, and create new experiences. Your Chapter's leadership will continue to listen and learn from homeowners, board members, community managers, and business partners so that we can continue to grow our organization.

So, let's connect! What keeps you up at night? Are you a member of another organization that has delivered the WOW factor and you would like to see our chapter do something similar? Do you want to propose a new idea for how we deliver our content? Giving feedback to these questions are what give us the ability to create and provide value to the membership — as the saying goes, the more you give the more you receive.

Stay safe this fall and I can't wait to see you !



Our Mission Statement is....

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Managing Communities While the Developer is Still in Control

By Heidi E. Storz, Esq.

For some, “developer” is a bad word. For others, a “developer” provides new business opportunities. Before a homeowners association has transitioned from developer to homeowner control, community managers have to work with people in both camps and must walk the difficult tightrope between them. This article describes the one and only tried and true method that will assist community managers in keeping both the developer and homeowners happy (or at least keep people from blaming the community manager for their problems) while the developer is still in control of a community association. That method is through fostering communication.

In a newly constructed community, homeowners are instructed to report outstanding warranty items to the developer by the end of the warranty period. When homeowners make warranty claims and do not receive a timely response from the developer’s warranty manager or if the warranty manager sets up meetings that their subcontractors then “blow-off”, homeowners rightly become frustrated and angry. Moreover, developers often experience high turnover in the warranty manager positions. The high turnover adds to the frustration, as homeowners are then forced to report items multiple times and often get different responses from different warranty managers. For example, one warranty manager may promise to take care of something, while the subsequent warranty manager tells the homeowner the issue they are reporting is not covered by the warranty.

On the developer side, warranty managers can understandably become frustrated with homeowners (and there is always at least one) who incorrectly believe that the warranty manager is their own personal “handyman” or that insist that the removal of the toy their two-year old stuffed down the toilet should be covered by the warranty. Some homeowners are ultimately unable to be satisfied, and no amount of remedial work will make them feel as though their issues were resolved.

When these frustrations boil over to include the community manager, what is a manager to do? Simply and without fanfare - community managers should do their best to help these people communicate with each other. Any time communication breaks down between people in a dispute, those people start talking to other people instead of one another. With homeowners, that often

means talking to their neighbors, then talking to people who read online reviews or watch Tom Martino, and eventually talking to lawyers.

So how can a community manager help people in this scenario who are frustrated with each other communicate better? Easier said than done for sure, but here are a few suggestions:

Keep the contact information (including phone number and e-mail address) for the developer’s *current* warranty manager at the ready so that you can provide it to homeowners when they call. This way, homeowners are not wasting time trying to contact people who will no longer return calls and cannot help them.

Make sure the developer’s warranty managers are informed of and invited to all homeowner meetings. That way, the warranty manager can field homeowner questions about their homes and the community manager won’t have to.

Obtain a copy of the developer’s warranty standards so that you can refer homeowners to those if they have questions regarding warranty coverage.

Advise the developer-appointed board members of inquiries that you are receiving from homeowners regarding warranty issues so that they can follow-up with the warranty managers.

For most people, their home is their biggest investment, and people feel strongly about protecting that investment. As such, it is no surprise that homeowners become emotional if they believe developers aren’t treating them fairly. It is never easy to deal with frustrated people that feel powerless in their situations. Community managers, however, are uniquely positioned to help dissipate the frustration that can arise between homeowners and developers when you give people real tools to work with. As the old adage goes, “information is power” and information is the tool that can help people move beyond their dispute to solutions.

About the Author



Heidi Storz, a shareholder at Kerrane Storz P.C., has been representing property owners and community associations with construction defect claims against developers, builders, subcontractors, and their insurance companies for over 20 years. Heidi has assisted thousands of homeowners and building owners in resolving their construction defect and insurance disputes.





LEAH K. BURTON

Get to know your CAI Chapter President.

5 FACTS ABOUT LEAH K. BURTON

1. Leah represents POAs of all sizes from small condominium complexes to large multi-thousand lot master-planned communities.
2. Leah has practiced POA law in both Texas and Florida and understands the complexities that associations face around the U.S.
3. Leah was raised in Anchorage, Alaska and is no stranger to the cold winters that sometimes visit the Texas Hill Country, but she enjoys the Hill Country summers more.
4. Leah's experience practicing civil litigation in California prepared her to better advise her POA clients on the risks they may face from litigation.
5. Leah is active in the San Antonio region as a member of the San Antonio Bar Association and Bexar County Women's Bar Foundation.

Learn more about Leah at www.RMWBH.com



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How to Determine an Appropriate Budget for Your Project

The Playwell Group (www.playwellgroup.com, 800-726-1816)

Project Needs

Before determining what your budget for a new equipment installation is, factor in what your community's needs are for the intended project. What is the purpose or intention of the project and what are you trying to accomplish?

If the project is a new playground for your community, determine factors like whether or not the outside environment is exposed to constant and intense heat, or if the current landscape is uneven. Perhaps the project requires demolition of an existing structure. These are all great examples of things to keep in mind.

Once you have these figured out, moving forward onto harder decisions will become much easier.

Know What You Want

Next, consider what your community wants from the project. Does your community have any preferences or requests? Maybe you are wanting a slide for the playground or interactive equipment for a new park. Have in mind what styles you like and what would enhance the user's experience. For a playground, having asphalt underneath won't be the best choice when it comes to safety.

This is the time where brands, colors, materials and styles are typically determined for the project. Don't worry about getting too specific, your local playground provider will help walk you through various available options to suit your project. Follow some of the guidelines from the 'Common Ground' (January/February 2021 issue) for selecting the right provider for your project.

It's Time to Get Real. Down to the Nitty Gritty

Now for the most important part, how much can you comfortably afford for this project? Find a team of professionals who are experts at helping find solutions to fit your project. But for them to do this to its fullest, they need to know what they are working with. Whether your community is looking for state of the art pieces, or simplistic, yet

effective components – they can help bring your dreams to fruition.

Some Distributors even go as far as to help smaller entities raise funds for new projects. Others help connect communities to the funds and other resources they need to make their dream play and recreation space a reality. Resources like 'The Play-Core Grant Finder Tool' (<https://www.playcore.com/funding/results?country=united-states&state=national&project=>) help locate funding for your play and recreation projects. We invite you to search the database for grant opportunities that may be available in your area. The grants listed are funded by the organization specified in each grant summary. Please contact each funder directly for specific questions, deadlines, and eligibility requirements. Learn more about Fundraising support by contacting your service representative today!

Be Flexible

In order to accommodate your project's needs, be mindful that you may have to flex your budget or special requests. Creating an appropriate budget entails a clear understanding of what is needed and what is feasible. If needed modular equipment design provides you the perfect opportunity to phase out your playground project by breaking out your entire project into smaller affordable phases that you can schedule over the years to come.

Find Your Partner

Finally, find a partner that you are comfortable with and can work with. Do your research, vet your choices, and use your Professional Services Directory to help you in your search.



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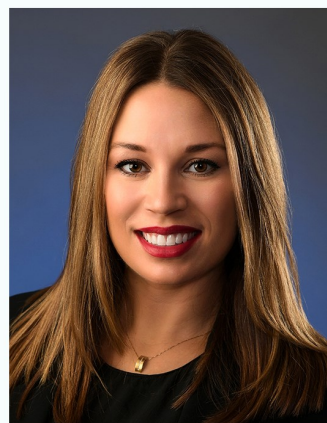
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MODEL CODE OF ETHICS

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.

COVID-19's Financial Impact on HOA Assessments

By Amy Repke

The majority (92%) of condominium and homeowners association residents are up to date paying their assessments, according to a new survey by [Community Associations Institute \(CAI\)](#), the leading authority in community association education, governance, and management.

To monitor and quantify the financial impact of [COVID-19](#), in April 2020, CAI began surveying members regarding payment of community associations assessments. A community's municipal-like services and amenities—trash collection, road and building maintenance, landscaping, snow removal, pools, fitness rooms, and playgrounds—are funded by homeowner assessments, also known as fees.

Thousands of CAI members, including community association management company executives and community association board members representing tens of thousands of community associations throughout the U.S., responded to the surveys. Nearly half (49%) of respondents represent homeowners associations; representatives from condominium communities (41%), housing cooperatives (1%), townhome communities (2%), and associations with a mix of housing (7%) also responded.

Data collected includes a benchmark against statistics from February 2020 (just prior to COVID-19 being declared a national emergency). Respondents indicated the percentage of homeowners who are current (up to date) paying their assessment obligations, 31–60 days late, 61–90 days late, or more than 90 days late.

According to the report, in January and February of this year, 5% of homeowners were more than 90 days delinquent in paying assessments—a two-point decrease from a 7% delinquency rate for December 2020. Communities averaged the lowest rate of more-than-90-day-delinquencies (3%) in September and October 2020.

“Since the federal government’s March 2020 moratorium on foreclosures, in response to the economic impact of the COVID-19 pandemic, condominiums and homeowners associations have not seen a sharp increase in the number of residents unable to pay their assessments,” says [Dawn M. Bauman](#), CAE, executive director for the [Foundation for Community Association Research](#) and CAI’s senior vice president for government and public affairs. “While assessment payments are holding steady, we expect to see an uptick in delinquency rates once mortgage companies are authorized to handle delinquent mortgage payments. Our benchmarking is an essential tool to inform community associations and help residents better prepare for short and long-term fiscal planning and forecasting.

About the Author

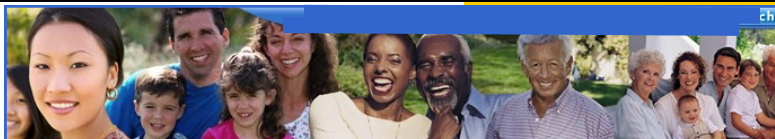


Amy Repke, Vice President, Communications & Marketing. Amy brings more than 20 years of experience to CAI. Her communications career began in television news where she worked as a producer, writer, and assignment manager for local and network news channels. Amy has been nominated for four Washington Regional Emmy awards for writing and producing. Amy is a graduate of Old Dominion University and received a master's degree in Strategic Public Communications from American University.



EVENTS CALENDAR

Mark yours today!



2021 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!

OCTOBER

10/8/21 – Golf Tournament - Canyon Springs Golf Club
 10/12/21 – Luncheon Meeting – (in person) - Maggiano's Little Italy
 10/19/21 – Board Meeting – Zoom On-line
 10/23/21 – Board Leader Development Workshop (Virtual)

NOVEMBER

11/9/21 – Board Meeting – Zoom On-line
 11/16/21 – Annual Meeting – Location TBD

DECEMBER

12/14/21 - Luncheon Meeting – TBD
 12/21/21 – Board Meeting – Zoom On-line

JANUARY

01/21/22 – Board Meeting – Zoom On-line
 01/29/22 – Awards Gala – The Espee

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NOTE: Location is San Antonio TX unless otherwise noted. Watch email for times and details. Always RSVP!

See you there!

Legal Assessments

Contributing Writers:

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

Assessments Damages Must be Proven

The Parks of Deer Creek Homeowners Association, Inc. v. Avanti N. Hunter, No02-20-00406-CV. (Tex. App.—Forth Worth July 29, 2021)

The Parks of Deer Creek Homeowners Association, Inc. (“Association”) sued Avanti N. Hunter (“Homeowner”) for unpaid assessments. The Association alleged that: (1) the Homeowner did not pay assessments levied by the Association; (2) the Association had demanded payment; and (3) the Homeowner failed to pay after the demand. The Association sought judgment for the assessments allegedly owed, costs of collection and related charges, and attorney’s fees.

A bench trial was conducted by the Hon. John P. Chupp in the 141st District Court, Tarrant County, Texas. At the conclusion, the court entered a take nothing judgment against the Association and in favor of the Owner. The Association appealed.

According to the Court of Appeals’ decision, the “full extent of the HOA’s proof [at trial] was from a witness who introduced herself as an association manager for the HOA’s ‘management company’ and whose testimony was limited to the sponsorship of five exhibits.” Those exhibits included: (1) the declaration governing the Association; (2) a warranty deed conveying property in the subdivision to the Homeowner; (3) a letter to the Homeowner from the Association demanding payment of past-due assessments, dated almost three years prior to the trial; (4) a “homeowner’s ledger;” and (5) invoices from the Association’s attorneys.

The Court of Appeals criticized the evidence offered by the Association’s counsel at trial, noting that “the witness gave no more explanation of the exhibits or of the basis for the

HOA’s claim” other than identifying the exhibits “in the most general terms.” The Court of Appeals also noted that no predicate was offered to support the Association’s ledger into evidence other than noting that it was a true and correct copy and a business record. Further, the Court of Appeals found that the “only guidance that the trial court had on what specific amount was due from [the Homeowner] for unpaid assessments came not from the witness’s testimony but from the HOA’s counsel’s opening statement.” In short, the Court of Appeals found that the Association offered no explanation of the ledger’s calculations or memo entries” and that its “superficial efforts to prove its damages left it to the trial court to weigh the evidence . . . thus, the HOA cannot prevail on its sufficiency argument that it proved its damages as a matter of law or that its proof was conclusive.”

As a result, the Court of Appeals affirmed the trial court’s take nothing judgment against 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 Associates Ryan Quiroz and Dominique Valenzuela. 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.

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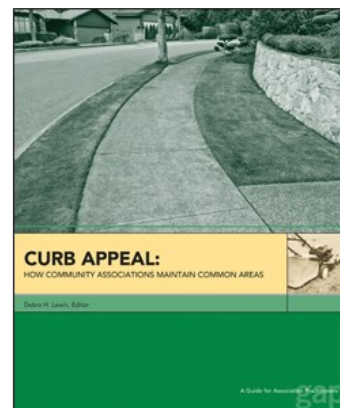


Curb Appeal

Common areas, as extensions of individual homes, influence the value and marketability of all homes in a community association. Even residents not interested in marketing their homes care about living in a healthy, well-groomed and attractive environment. Find out how to maintain and enhance common elements like recreation areas, landscaping, lighting, roads and parking lots, windows and other exterior elements; signs and entrances, and much more.

Item #0645.

Nonmembers: \$25 | **CAI members: \$15**



Landscape Contractors

This Guide for Association Practitioners covers it all—drafting specifications, performance criteria, warranties and guarantees, maintenance schedules, insurance requirements, and how to communicate with residents. Also includes advice on bidding the contract, selecting the best bid, legal review, environmental concerns, contractor performance evaluation, and provides useful sample specifications and warranties.

Item #0109

Nonmembers: \$25 | **CAI members: \$15**

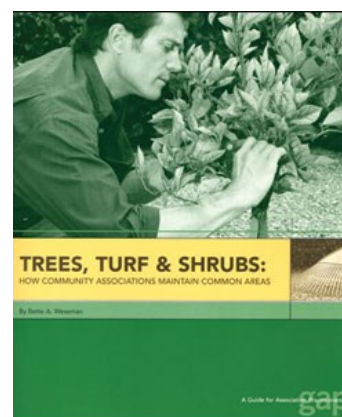


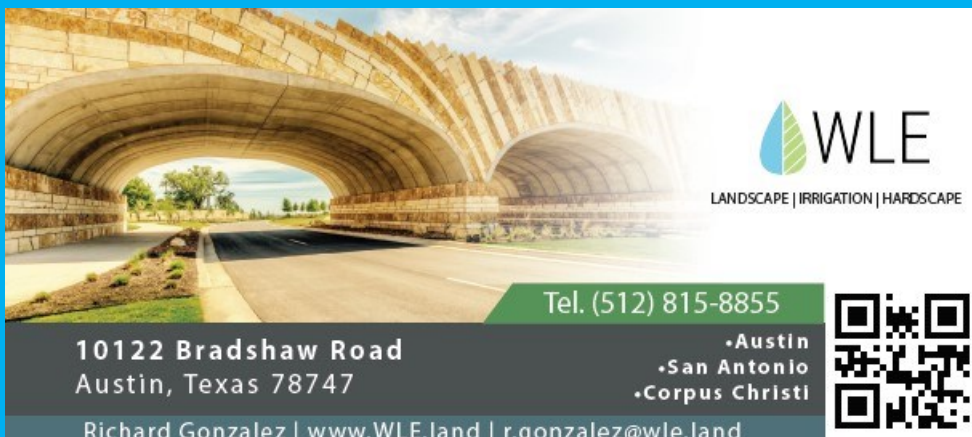
Trees, Turf & Shrubs

A good landscape maintenance program is essential to the health and longevity of a community's trees, turf, and shrubs—and its aesthetic value. This concise guide explains how to develop that maintenance program and lists specific practices to apply to trees, turf, and shrubs. Find out how to hire the right contractors and how to delegate to a landscape committee.

Item #0239.

Nonmembers: \$25 | **CAI members: \$15**






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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. 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.





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)

FOLLOW US ON SOCIAL MEDIA!

CAI San Antonio Chapter

Community Associations Institute
- San Antonio Chapter

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CAISChapter



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
- » **Professional credentials:** www.caionline.org/credentials
- » **CAI benefits for managers:** 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

» **Member Benefits:** www.caionline.org/homeownerleaders

» **Find a chapter:** www.caionline.org/chapters

» **Join CAI:** www.caionline.org/join



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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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Welcome New Members



New Members – 3rd Quarter 2021

Managers

Lindsay Annab	Bryana Espino
Valerie Cruz	Bob Adcock
Melissa Mojia	Briana Castillo
Desiree Romero	Lenny Scott
Alicia Tonnon	Marisa Yanez
Marquia Miles	Ginger Cabais
Lisa Michelle Parry	Breauna Delong
Crystal Monique Molar	Catherine Rogers

Membership Chair

VACANT

Business Partners

MeterNet – Felicia O'Brien
NFP Property & Casualty Services, Inc. – Francie Stocking

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

Volunteer/Homeowner

Chris Archer
James Sandoval
Diane Jackson

**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*

2nd Tuesday of Every Month

11:30 – 1:00 p.m.

RSVP Until Tuesday, One Week Before—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



2021 Board of Directors

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Awards Gala

Stephen Martinez & Jenee Lewis

CA Day

Roxanne Jones & Jessica Ramirez

Common Terra

Art Downey

Education

Tom Newton

Golf Tournament

Jenee Lewis

Membership

vacant

Nominating

Denise Jimenez

Sponsorship

Suzanne Hubbard

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 or call (888) 224-4321.

