

# Common Terra

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

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Fourth Quarter 2022

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## RFP vs. MSA

By Eric B. Tonsul, ROBERTS MARKEL WEINBERG BUTLER HAILEY PC

**T**he process for securing a vendor for your property owners association (POA) is not always as simple as it seems. There may be several vendors for the service you require, or there could be very few. But how can you, as a community manager or board member(s), ensure you are making the right decision or recommendation when choosing a vendor? In this article, we answer this question by looking at the request for proposal (RFP) process for POAs and highlight the differences between an RFP and the master service agreement (MSA).

### Who is a Vendor?

Before we examine the RFP and MSA, it is helpful to understand who exactly is considered a vendor. A vendor is anyone from outside of the POA that provides a service for the POA. Vendors include any service provider, such as a landscaper, plumber, painter, or pool maintenance company. Vendors also include the POA's professional team, such as the POA's attorney, CPA, banker, etc.. At any given time, the POA may require a new vendor for one of these services or want to learn more about the different providers that are in the market. To learn more

(Cont. on page 6)

## Inflation Reduction Act Gives Homeowners New Energy Savings

by Ben Price

**O**n August 7, the Senate passed H.R. 5376, the Inflation Reduction Act of 2022 on a party-line vote. The House passed H.R. 5376, the Inflation Reduction Act on 8/12/22, and President Biden signed it into law on 8/16/22.

While not as ambitious as the president's Build Back Better Act, this bill nonetheless will have an impact on homeowners in the form of the New Energy Efficient Home Credit and the Home Owner Managed Energy Savings (HOMES) Rebate Program.

**The New Energy Efficient Home Credit is reactivated and extended under this bill:**

(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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*"Thank you to the  
business partners  
and fellow  
managers that  
showed up to the  
CAISA Chapter  
2022 Annual  
Membership  
Meeting.."*



## **The President's Message —**

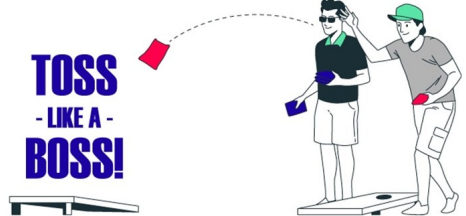
Thank you to the business partners and fellow managers that showed up to the CAISA Chapter 2022 Annual Membership Meeting. Though it was a very unconventional location for our Annual Meeting, the drinks were awesome and the food truck was delicious! I am pleased to report that Harmon Hamann and I were both re-elected for our last consecutive 2 year term, while Brady Ortego was elected to fill a new 2 year term (Welcome back Brady!). We hope to see everyone at the few upcoming events we have left for the 2022 year! Please don't forget that we have a bunch of committees that need help, so if you would like to show even more support for our Chapter, please volunteer a few hours of your time a month. Every little bit helps! I encourage each of you reading this message to

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**Cassie Thompson**  
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# RFP vs. MSA

(Cont from page 1)

about the options available, the POA can use the RFP process.

## What is an RFP?

An RFP is exactly as the name suggests it is – a request for a proposal of services from a vendor. While its name is straightforward, what is included in an RFP may not be as readily apparent. POAs can often get lost in the basics and only request a bid on the cost and completion time of the service that has been requested and not ask for further details from a potential vendor that can be necessary, or helpful information in deciding on the right vendor for the POA.

With the recent passage of SB 1588, it is imperative every POA (that is governed by Chapter 209 of the Texas Property Code) should have an RFP process. Vendor services valued at over \$50,000 are now required, by state law, to go through a bid process set forth by the POA. The POA should consult with its legal counsel to determine the types of services and contracts this will include. The RFP process should be consistent no matter the type of service the POA is requesting. An RFP should set forth what is expected of the vendor in specific detail so that the vendor can provide a proposal that will be reasonable in light of the price being paid for the desired service. When preparing the RFP, the POA will need to consider the various elements for which the POA needs more information. Those elements should include: the scope of the project, the specifications, the expectations of the POA, the standards, the quantifiable results, payment terms, default, termination provisions, references for the vendor and the types and policy limits of insurance the vendor carries. When issuing a call for an RFP, the POA should use the same type of form for each vendor to submit their information.

## What is an MSA?

The MSA, also known as the master service agreement, is the POA's contract for use with its vendors. The MSA sets forth the requirements that often stall or terminate the process. These require-

ments include, but are not limited to:

- Terms
- Scope
- Insurance
- Indemnity
- Default
- Right of Termination

The vendors' bids using these requirements are based on a set contract document, which helps avoid confusion for the POA when comparing the bids.

## Understanding the Differences Between and RFP and an MSA

The RFP and MSA are two separate tools working together to find the vendor that is right for the POA. An RFP should never be viewed as a final contract between the POA and the vendor. The RFP should only outline the type of service the POA is seeking and the specific elements from the vendor to perform that service. The MSA is the final contract that is executed by the POA and the vendor once a vendor is selected. Each provision within the MSA is important to understanding the agreement between the POA and its vendor. Both parties need to perform as they have agreed to ensure a great relationship between the vendor and the POA is maintained. ©RMWBH Law 2022

## About the Author



*Eric B. Tonsul is a Shareholder in RMWBH's Property Owner's Association Section based out of the firm's Houston Office. Eric's career has focused on representing property owner's associations in corporate matters and as general counsel to the association. He routinely interacts with Board members and community management companies by providing legal opinions relating to corporate governance, interpretation of dedicatory instruments and issues relating to collections and deed restriction enforcement and contract drafting and review. Eric also provides guidance as to the interpretation of an association's governing documents and the applicability of the law in relation to the governing documents.*

# HOA Halloween Safety Tips

By Laura Otto

Increased crowds, noise, and parking are top safety concerns for homeowners associations across the U.S. this Halloween. According to a [CAI](#) survey, close to 50% of respondents plan to host a Halloween party or parade in their community.

What challenges will homeowners associations face on Oct. 31? Roughly 22% of communities report they hire extra security to deal with large crowds and some even enlist the help of neighborhood watch volunteers to keep trick-or-treaters and noise under control.



If your community doesn't have a policy for neighborhood trick-or-treating, it's important to follow these tips to ensure everyone has a safe Halloween.

- Make sure your HOA's walking areas and stairs are well lit and free of obstacles that could cause falls.
- Remind homeowners to keep candlelit jack o' lanterns and other open flames away from doorsteps, walkways, and landings. Instead, place them on sturdy tables and keep them out of reach of pets and small children.
- Remind residents to drive slower while kids are out and about trick-or-treating.

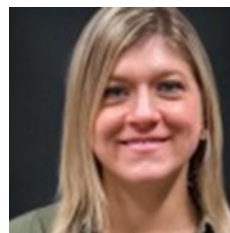
Is your HOA the place to be for trick-or-treaters?

If so, more people means more cars. Refer to your CC&R's to know the rules on parking in your association including where visitors can park and what kind of passes may be needed.



As communities search for ways to keep children safe and handle an increase in traffic this Halloween, trunk-or-treating is becoming a widely-popular alternative to walking from house to house. A tradition most commonly found in southern states where neighbors use a church or community parking lot and decorate car trunks to welcome trick-or-treaters.

## About the Author



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



## Voting Resources to Support your Community Association

By Dawn Bauman

The Foundation for Community Association Research's 2022 Homeowner Satisfaction Survey reports that 70.67% of Americans living in community associations always or almost always vote in elections. Getting to the polls is incredibly important to ensure association values are upheld in legislation. CAI encourages all of its advocates to get out and vote for candidates that support the community association housing model. Historically, midterm elections follow a few trends:

1. **Low Voter Turnout** Statistically, according to the US Census, nearly two-thirds of registered voters vote in presidential elections but less than half vote in midterms. However, over 70% of association residents plan to vote in the November general election making our advocates one of the top groups for voter efficacy in the U.S.
2. **The Economic Effect** Historically, the top issue for voters in midterm elections is the economy. For the first time since 2016, a new Gallup poll reports that more than half of all Americans say the economy is the top issue on their minds. For advocates of the community association housing model, the top issues are more widespread: economic issues and taxation top the list, along with community association values, building safety and regulating association boards. Check out our list of advocacy priorities here.
3. **Winners Keep on Winning** Incumbents are more likely to keep their seats. An average of 90% of incumbents wins re-election. Due to the phenomenon of incumbency advantage, many voters, especially those who vote without doing research, favor sitting legislators. While community associations housing model advocates say they feel prepared to vote, CAI makes it easy to ensure you're prepared for the polls and ready to #VoteforHome with our Voter Resources Center!

Is 2022 the same as years past? Not only is this election unique due to current events and issues impacting our daily lives but also because of changes to the election process. A few of the highlights:

1. **Alaska's First Ranked-Choice Vote** There are 68,000 Alaskans living in nearly 1,000 community associations in the state and 64% say they always vote in national elections. The August 16 primary is the first ranked-choice election in the state's history. Ranked-choice elections are different than what most Americans are used to. Instead of choosing one candidate per office, voters rank their choices in order of favorability. Adding to the unique election, Alaska has a nonpartisan ballot, meaning all candidates, regardless of party affiliation are listed on the same ballot. This means voters have 19 options for senator and 22 options for representative. The complicated ballot means it'll likely take longer to declare a winner than usual, and some predict more ballots might be invalidated due to the confusion. We recommend looking at your sample ballot before heading to the polls to make sure you're prepared. You can see a sample ballot by checking out our Voter Resources Center.
  2. **Redistricting** After the 2020 census, this is the first round of elections with new voting districts. Fourteen states are in litigation over the proposed maps, but as it stands each state has some new districts to vote in. If you aren't sure if your district has changed or if you have any other concerns about your upcoming vote, you can get answers to all of your questions at our Voter Resources Center.
  3. **New Voting Methods** In response to the COVID-19 pandemic, many states changed rules for voting absentee, voting by mail, and
- (Cont. on page 11)

# 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).

# Inflation Reduction Act.....

(Cont. from page 1)

- While it originally expired on December 31, 2021, it now sunsets on December 31, 2031. All homes acquired after this date are to be made retroactively eligible for this program.

The previous credit amounts are also modified, with qualifying single-family units eligible for two different tiers of credits.

The first tier, covering single-family homes acquired before January 1, 2025, and meet the Energy Star New Homes National Program Requirements 3.1, is eligible for a credit of \$2,500. Single-family homes which were acquired after December 31, 2024, and meet the Energy Star New Homes National Program Requirements 3.2 are eligible for a credit of \$5,000.

Multifamily buildings are eligible for rebate tiers of \$500 and \$1,000 per unit, with the first tier needing to meet the Energy Star Multifamily New Construction National Program Requirements, and the second needing to meet Energy Star Multifamily New Construction Regional Program Requirements.

Both tiers require adhering to the requirements as published either on January 1, 2023, or three years prior to the date the dwelling was acquired, whichever is later.

This program also sets a requirement that the taxpayer must ensure that the workers involved in the construction of the home are paid a prevailing wage as determined by the secretary of labor.

The U.S. Department of Energy lists [online](#) the criteria for a new home to meet the Energy Star New Homes National Program Requirements 3.1, including:

- High-performance fenestration and insulation
- Fully-aligned air barriers
- Air sealing
- Duct quality installation

Energy Star New Homes National Program Requirements 3.2 have not yet been finalized.

## **The Home Owner Managing Energy Savings (HOMES) Rebate Program is created:**

- The bill allocates \$4.3 billion to the department of treasury to establish a new fund for state (defined to include the District of Columbia and United States Insular Areas)-led Home Owner Managing Energy Savings

(HOMES) Rebate Programs. Funds will be made available until September 30, 2031.

- While the implementation of a HOMES Rebate Program is explicitly left up to state energy offices, the bill does lay out criteria for what the program would look like including specifications that home retrofits be calibrated to historical home energy use consistent with building performance institute standards. Instructions for calculating overall savings are to be determined by the secretary of treasury at a later date.

- Single-family homes which achieve energy savings of 20%-35% can receive funds equivalent to 50% of the project cost, capped at \$2,000. The cap for homes that achieve 35% or more of energy savings is set at \$4,000.

- Homes that achieve 15% or less in savings are eligible to receive either 50% of the project cost or a payment rate per kilowatt hour saved, equal to \$2,000 for a 20% reduction in energy use (when compared to an average home in that state).

- Contractors are eligible for a \$200 rebate for every home in a disadvantaged community they retrofit.



## **INFLATION REDUCTION ACT GIVES HOMEOWNERS NEW ENERGY SAVINGS**

HOME rebates may not be combined with any other federal rebate program.

While there are provisions in place for multi-family properties to fall under the coverage of the HOMES Rebate Program, it is unclear at this time if condominium and cooperative housing are considered

(Cont. on page 11)



## Inflation Reduction Act.....

(Cont. from page 10)

multi-family properties as used in the legislation. CAI will continue to monitor for clarification on the definition of multi-family as used for the HOMES Rebate Program.

The HOMES Rebate Program originated in a separate bill, H.R. 3456/S. 1768, the HOPE for HOMES Act of 2021, which was introduced in the runup to President Biden's Build Back Better Act. The HOPE for HOMES Act was folded into Build Back Better. Per a press release from one of the bill's original sponsors, Rep. Peter Welch (D-VT), projects falling under the scope of the HOMES program include:

- Home insulation
  - HVAC replacement and insulation
- Air source or ground heat source pump installation and insulation

CAI will continue to monitor this new program for further guidance on the scope of eligible projects.

### About the Author



*Benjamin Price is CAI's Manager for Government & Public Affairs. Ben joined CAI in 2022 and serves as the team's lead for tracking local-level issues. He also assists with CAI's many advocacy efforts at the state level, and is responsible for conducting research projects and assisting with the development of CAI Public Policies*

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## Voting Resources ....

(Cont. from page 8)

early-voting options. Because a large percentage of Americans plan to vote in a non-traditional manner, states now take longer to tally votes. Community associations in 27 states have incorporated modern voting practices, which makes association residents more prepared to vote in a non-traditional manner.

Voting can be confusing, but CAI has a unique resource: the CAI Voter Resources Center. To see all things related to your voter registration, precinct, register to vote absentee or any other question, the CAI Voter Resources Center has your answer. Enter your primary address to see your candidates, primary date, and state-specific election information. Not registered to vote or need to check? Use the Voter Registration Tool to see more information and double check your registration status.

Go to: [Action Center \(votervoices.net\)](https://votervoices.net)

### About the Author



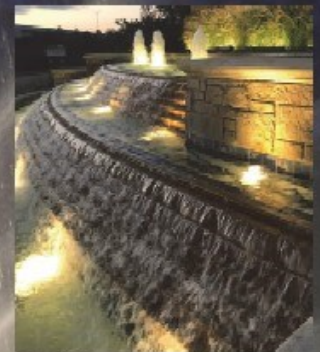
*Dawn M. Bauman, Senior Vice President, Government & Public Affairs; Executive Director, Foundation for Community Association Research.*

*She has worked for CAI for nearly 20 years at both the international and chapter level. Bauman and her team have produced nearly fifty public policy initiatives impacting the community associations housing model—including policies on Fair Housing, pets and assistance animals, and the removal of racially restrictive covenants. In 2021, as the executive director of the Foundation for Community Association Research, Bauman led the research committee's mission to better understand diversity and inclusion in today's community associations.*



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## CED Corner



**Jesus Azanza**  
Chapter Executive Director

I want to start by thanking you for your support of the Chapter over the past 10 months. We value your contribution and attendance at every event and hope that you have found our programming this year to be a worthwhile investment. Your involvement is not only appreciated, but also necessary as we continue our mission to serve as the place where community association volunteer leaders, managers, and business partners connect!

In August, we welcomed nearly 300 members at The Westin San Antonio North for our annual CA Day event. Over 50 vendors were on display and hundreds walked through the exhibit hall to view the latest products and services that help protect and advance community associations. A very BIG thank you to the entire CA Day Committee for making this year's event a memorable experience – without their support, the event would not have been possible.

This month, the Chapter hosted a record-breaking golf tournament with 84 registered players and our first-ever Cornhole Tournament benefiting the Texas Legislative Action Committee (TLAC). Both events were well-received and resulted in members taking home some of the best raffle prizes

and trophies I have ever seen.

Every Chapter event is supported by members who devote their time to see the organization move forward. Each year, committees are tasked with not only conceptualizing ideas and developing educational topics, but they are also responsible for working with staff and the Board of Directors to carry out the intricate details required to produce a given event. I encourage each of you reading this message to GET INVOLVED! From membership to awards gala, and from golf to education, the opportunities for you to establish yourself as a leader within the Chapter and industry are endless. Have I convinced you yet? If so, send me an email at [ced@caisa.org](mailto:ced@caisa.org).

As we continue through fall and head into the Winter months, CAI will begin to increase our preparation and activity leading into next year's Legislative session. With the support of CAI members, our government relations team, TLAC, and the dozens of delegates/volunteers from across the state, I am confident that CAI members will be represented at every stage of the legislative process. If your company or community has not yet given to TLAC, please consider doing so or working an amount into your budget for 2023. For more information visit

[www.caionline.org/Advocacy/LAC/TX/](http://www.caionline.org/Advocacy/LAC/TX/).

Until next time!

**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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## How Community Managers and Property Managers Have Distinct Roles

By Laura Otto

A common mistake among the general public—is to lump community association managers and property managers into the same bucket. While both are very important roles, they are distinctly different professions with functions, skill sets, and responsibilities specific to each.

A community association manager can manage every type of community: condominium associations, homeowner associations, resort communities, and commercial tenant associations.

A community association manager works directly with property owners and homeowners.

Property managers oversee individual rental units or a group of rental units, such as an apartment complex. They're responsible for managing the entire property, while community association managers are responsible for common areas—not individually owned properties.

This misunderstanding of the two professions often bleeds into more general conversations occurring in this space. Compounding this is the reality that there's a slight overlap in a couple of the duties performed. For example, both property managers and community association managers supervise certain maintenance activities, such as swimming pool upkeep and trash removal. But it's important to understand that community association managers oversee and direct *all* aspects of running the business operation. This means that they authorize payment for association services; develop budgets and present association financial reports to board members; direct the enforcement of restrictive covenants; perform site inspections; solicit, evaluate, and assist in insurance purchases; and even supervise the design and delivery of association recreational programs.

Property managers are responsible for managing the actual property and therefore handle the physical assets of the unit at the owner's request. Property managers generally oversee rental units and leases. Their responsibilities might include finding or evicting tenants, collecting rent, and responding to tenant complaints or specific requests. If a property manager is responsible for a vacation or second home, he

or she may arrange for services such as house-sitting or local sub-contracting necessary to maintain that property. Alternatively, an owner may opt to delegate specific tasks to a property manager and choose to handle other duties directly.

Stephanie Durner, CMCA, AMS, director of community management at River Landing, a gated golf course community in Wallace, N.C., views the distinction this way:

"While property managers are generally charged with overseeing physical structures that are used by people who are not the owners of the property, association managers represent the property owners themselves and are involved in just about every aspect of the overall community. For instance, if a garage door is broken at a rental house, the tenant would call a property manager or owner/landlord. But if there's a pothole that needs repair or if a neighbor's dog is running loose through the neighborhood, that's a task for the community association manager who both maintains the common areas and upholds the governing rules. To me, community association management is a more holistic approach that contributes to the overall quality of life for all the owners in a community."

### About the Author



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

# ROOFING 101

## WHAT IS ON YOUR ROOF?



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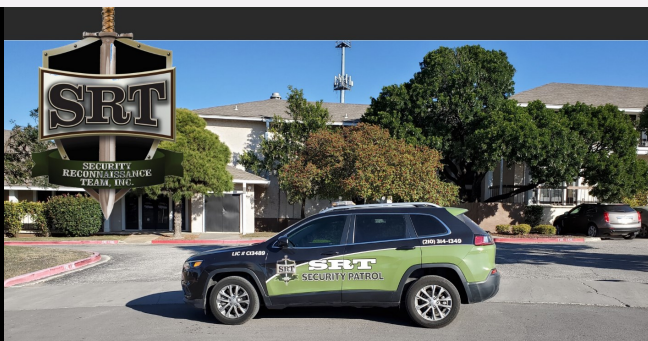
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## MODEL CODE OF ETHICS

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.





## 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

**GET INVOLVED AND SUBMIT YOUR CONTRIBUTION! CONTACT YOUR LOCAL COMMUNITY ASSOCIATIONS INSTITUTE CHAPTER EXECUTIVE DIRECTOR:**

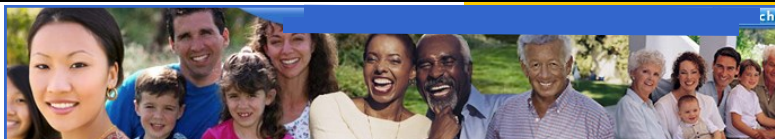
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# EVENTS CALENDAR

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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!*

### November

November 2 @ 11:30 am – Educational Luncheon – Active Shooter Training - The Well (5539 Utsa Blvd, San Antonio, TX 78249)

November 15 @ 10:00 am – Board Meeting – Virtual on Zoom

November 15 @ 5:00 pm – Networking Event – Stumpy's Hatchet House (758 Isom Rd, San Antonio, TX 78216)

### 88<sup>TH</sup> TEXAS LEGISLATIVE SESSION IMPORTANT DATES

**November 8, 2022** - General election for federal, state and county officers

**November 14, 2022** - Bill Filing opens for 88th Texas Legislative Session

**January 10, 2023** - 88th Texas Legislative Session convenes at noon

**March 10, 2023** - Final day to file bills for 88th Texas Legislative Session

**May 29, 2023** - Sine Die, 88th Legislative Session concludes

**June 18, 2023** - All passed bills that are not signed by Governor or vetoed become law

Luncheon Programs are more popular than ever!  
Always register early and check [www.caisa.org](http://www.caisa.org) for the most current information about programs and events.

**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 and Ryan Quiroz Pulman, Cappuccio & Pullen, LLP

### **HOA's Attorney Fees Are Not Recoverable from Homeowner if Fee Were Incurred Before Required Hearing Under Texas Property Code § 209.007**

**Lanny V. Dao, v. Mission Bend Homeowners Association, Inc., 2022 WL 3031619 (Tex. App.—Houston [1st Dist.] August 2, 2022)**

In March 2019, Mission Bend Homeowners Association, Inc. (the “**HOA**”) filed suit against property owner, Lanny V. Dao (“**Dao**”). The HOA sought a permanent injunctive against Dao to compel him to remove an unapproved water fountain that he installed in his front yard. The HOA alleged that the installation of the water fountain violated various restrictive covenant (the “**Restrictions**”). The 61<sup>st</sup> District Court, Harris County, conducted a bench trial and found that Dao violated the Restrictions by installing the water fountain without ACC approval. As a result, the trial court granted the HOA's request for a permanent injunction requiring Dao to remove the water fountain, and it awarded attorney's fees to the HOA. Dao subsequently appealed the trial court's decision.

On appeal, Dao raised a number of issues, including: (1) that the HOA's failure to conduct a pre-suit hearing as required by the Tex. Prop. Code § 209.007 deprived the trial court of subject matter jurisdiction (a matter of first impression); (2) the deed restrictions did not prohibit the water fountain; (3) the evidence was insufficient to support a finding that Dao violated the deed restrictions; (4) the Association exercised its discretionary authority in an arbitrary, capricious, or discriminatory manner; and (5) the Association's attorney's fees were not recoverable.

With respect to the jurisdictional issue of first impression, the Court of Appeals noted that the hearing requirement under § 209.007 is only

mandatory in some, but not all, cases. The Court of Appeals also considered other sections under Chapter 209, including §§ 209.006, 209.007, and 209.008, and ultimately determined that the Legislature did not intend to make a hearing under § 209.007 jurisdictional in nature.

Dao's other issues on appeal were also overruled, except for his challenge to the trial court's award of attorney fees to the HOA. With respect to this issue, Dao argued that the trial court erred because the Property Code provides that an owner is not liable for attorney's fees incurred before the conclusion of a § 209.007 hearing. The HOA did not dispute its receipt of Dao's timely request for a hearing, and there was no dispute that a hearing was never held. The record merely reflected that Dao was advised that he could attend any of the HOA's monthly board meetings. This was insufficient. Thus, Court of Appeals affirmed the permanent injunction requiring removal of the water fountain, but it modified the trial court's judgment to eliminate the award of attorney fees to the HOA.

### **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”). He is assisted by Senior Counsel Paul Gaines and Associate Attorney Ryan Quiroz. 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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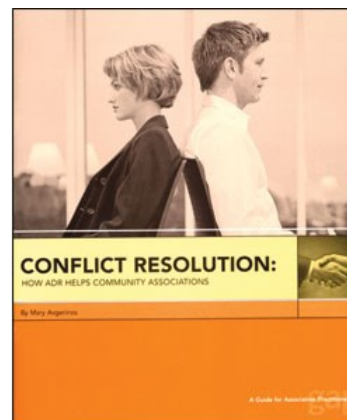


### ***Conflict Resolution***

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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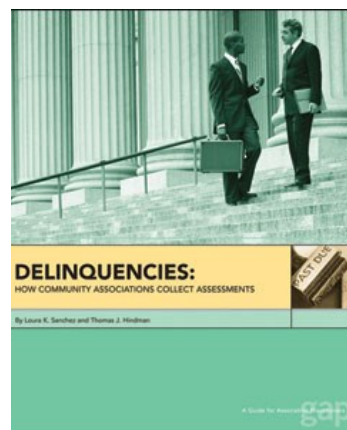


### ***Delinquencies***

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

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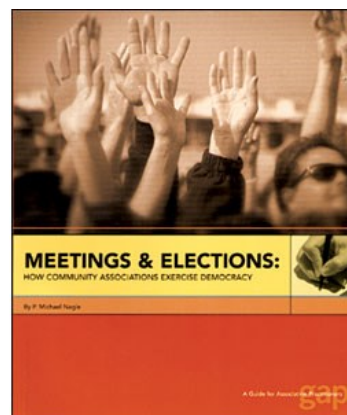


### ***Meetings & Elections***

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

Item #0796.

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# Active Shooter Emergency Planning

## Allied Universal Safety Tip

**The threat of an active shooter is a possibility anywhere. However, as with any crisis situation, preparation and planning can help minimize chaos and injury. Establishing an active shooter protocol and communicating that plan to your tenants and employees, is critical.**

### THE ACTIVE SHOOTER PLAN

- ✦ Stress the importance of remaining calm in any violent situation.
- ✦ Encourage anyone involved to call 911 in an emergency.
- ✦ Enforce the importance of remaining on the line with the 911 operator until police arrive because needs may change as an event unfolds.
- ✦ Detail how to warn employees an active shooter is present. Code words, intercom capabilities, and instant messaging can help
- ✦ ensure people are aware of the situation and stay out of harm's way.
- ✦ Include evacuation and lock-down procedures.
- ✦ Discuss how employees can observe details of the shooter in case the perpetrator leaves the premises.
- ✦ Train people to take accurate head counts and to check others for injuries.
- ✦ Account for mock shooter drills.

If an active shooter enters your workspace, call the police and give the location and description of the shooter if possible. **Do not** attempt to negotiate with the shooter and **do not** attempt to overpower them with force.

When possible, evacuate the building if it appears safe to do so. This may need to be through a window or back door. The safest exits in an emergency may not be the main hallways or doors—well-marked exits could be targets for potential shooters. It is crucial not to assume help will quickly come to evacuate the location as active shooter incidents are the most chaotic, confusing, and difficult scenes to manage. The first responders' priority will be to contain the shooter. If you are able to and decide to flee the building, have an escape route in mind, bring a cell phone, keep your hands visible and do not stop to assist wounded victims or move them. Instead, tell the police where they are located. If there are no safe escape routes, a lock down might be a better choice. Immediately notify the police of where you are, and conceal yourself in a room that can be locked or barricaded. Turn off the lights and stay away from doors and windows to create the impression that no one is there. When the police arrive, move slowly, keep your hands visible and follow all instructions.

**The response to an active shooter situation will be determined by the particular circumstances. It is important to assess the situation and make the best choices for the individual event.**



# Flags: What Can Fly in an HOA

By Samantha Rosenbloom



During election season, flags and signs can be a particular point of sensitivity for homeowners' associations. The rules promote uniformity within the community and avoid the potential of an excessive display of flags and signs. Increasingly, states are adopting policies that impact community associations'

ability to regulate certain signs and flags.

Currently the display, size, flagpole height, number allowed, as well as the time and place of display of flags are regulated. Right now, 12 states regulate flags, and 13 states regulate signs, but most states have pending legislation on the matter, according to Elina B. Gilbert, Esq., shareholder at Altitude Community Law PC in Lakewood, Colo. Homeowner associations have the power to regulate signage in governing documents, but states are overriding this authority because many see flags and signage as a constitutional freedom that must be protected.

It is important to consider the practical applications of regulating flags and banners. "Regulations are in place to protect property values and promote harmonious living," says Airielle Hansford, CMCA, AMS, PCAM, vice president at FirstService Residential in Fairfax, Va. "The question of whether this is an infringement on homeowners' rights depends on the association, but governing documents are deemed a contract, and they can provide the community association with the right to restrict signs, flags, and other items on the lots."

Signage and flags can escalate emotion and tensions within the community, so it is important to consider that expectations may change over time.

"Each community is unique, so there may be pe-

riodic reviews of governing documents and changes can be made," says Hansford, adding "Rules should be reasonable, uniformly applied, and enforceable."

Additionally, HOAs should ensure the regulations for flags and signs are not in conflict with each other. Hansford's final piece of advice: "Community associations communicate with owners ahead of the election cycles to advise what is permitted and prohibited and lay out any exceptions to the rules for each election cycle."

Involving community members in the process of drafting regulations is a considerate and sensitive way to include culture and climate and ensure uniformity, compliance and promote harmonious living in your community.

## About the Author



**Samantha Rosenbloom** is a current student at Denison University, double majoring in Communication and Environmental Studies. She is also the Director of Recruitment

Events for the Ohio ETA chapter of Pi Beta Phi at Denison, and the incoming Director of Events for Denison's Women in Business club.

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### 5 FACTS ABOUT MATT

- 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.





CAI of San Antonio

Sponsorship Program

2022

# ANNUAL SPONSORSHIP PACKAGES







CAI of San Antonio

## Sponsorship Program



## DIAMOND - \$4,000

### EVENTS

- » One (1) free premium booth at CA Day - **NEW!**
- » Ability to pre-register for all events, one (1) week in advance of normal registration
- » 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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## New Members – 3<sup>rd</sup> Quarter 2022

### Managers

James Arthur - Community Service Management  
 Krystle Botello - Trio Homeowners Association Management  
 Charles Cleveland, CMCA - Associa Hill Country  
 Marcy Leona Crane, CMCA - Crane-Quist Ventures LLC  
 Melanie Daves - Copper Canyon Residential Community, Inc.  
 Zachary S. Dulevitz - Alamo Management Group  
 Michelle Inscore -CCMC - TX  
 Lisa Ivy - RealManage San Antonio, LP  
 Michael Jefferies - Birdy Properties, LLC, CRMC  
 Megan M Lamb  
 Maggie Matos - Associa Hill Country  
 Salvatore Paradiso - CCMC - TX  
 Ronna Price - CCMC - TX  
 Rachael Robinson - Ventura Maintenance Association  
 Tera J Rond - CIA Services  
 Michelle Ross - RealManage  
 Jill Sallis  
 William Lee - Sexton-Mendoza, CMCA, AMS - C.I.A. Services, Inc.

### Business Partners

AvidXchange – Kelly Rodriguez  
 Google Fiber – Omar Carrizal  
 Gordian Staffing - Rob Murray  
 Jetstream Pros - Jon Johnston  
 National Pavement Partners - Alley Gibson  
 National Renovations, LLC - DBA Repipe Specialists, Inc – Daniel Buffington

### Volunteer/Homeowner

Kristine Ayala  
 George Brundage  
 Michael Erickson  
 Peter Gaitan  
 Leslie Horn  
 Robert Jauregui  
 Abel Jones  
 Jim Jones

Mike Magill  
 Mike Martin  
 Ron Megrew  
 Ron Orsi  
 Rodger Ramos  
 Neil Rasmussen  
 Marie Salimbini  
 Mike Sterns



### **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**

Sonia Lopez

**Director**

Harmon Hamann

**Director**

Leah K. Burton

**Director**

Brady Ortego

**Director**

Vacant

### COMMITTEE CHAIRS

**Awards Gala**

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

**Sponsorship**

Suzanne Hubbard

**TLAC & Legislative**

Sonia Lopez

**Community Outreach**

Austin Denson & Melissa Coe

# 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.

