

OC VIEW

CAI - ORANGE COUNTY
REGIONAL CHAPTER
MEMBER MAGAZINE

JULY / AUGUST 2025

**Preserving Value:
How AI-Enhanced Tools Empower
Community Managers to Protect
Physical Assets**

**Are You Staying Ahead of the Surge?
Checking In on Your Preparations
for a Greener Future**

**Deferred Maintenance:
The Hidden Costs of Aging
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President's Message



Dave Potter, CMCA, AMS
Golden Rain Foundation – Seal Beach
Chapter President



I am writing this after returning from CAI Nationals in Orlando. The annual convention was exciting and informative, as well as bittersweet; it was the final conference for CAI's long-tenured CEO Tom Skiba. After leading the chapter through an incredible cycle of growth, he is retiring and we all wish him the best. After the conference, it was announced that Dawn Bauman, whom I've had the pleasure of working with through CLAC and speaking with at chapter luncheons, would assume the CEO role. I couldn't be more excited and pleased with this choice, and I know CAI is in the best possible hands for the future.

Our first few months under our new CEO are shaping up to be as eventful as ever. On August 5, our Emerging Leaders present a Goal Setting Workshop to help attendees learn about the effective way to set goals. This workshop aims to provide participants with a practical roadmap for effective goal setting and the tools needed to achieve their desired outcomes. And if you're just looking for CEUs, you get 2 for attending this workshop. Then on August 14, the chapter is hosting a Flamingo Bingo, which will be a night of dinner, networking and fun at the Tustin Ranch Golf Club.

On August 24, our Outreach Committee's Annual Beach Clean Up is happening where you can do your part to help keep our beaches clean and beautiful for all to enjoy. Two days later, on August 26 is our Annual Symposium and Expo, which will have scores of learning opportunities and a vendor expo. September brings more courses from HOA U and the chapter's CMCA study group. It will also feature the return of our bowling tournament, just in time for budget season.

Budget season is traditionally the most stressful time of year for managers and Board members, because a community's budget is the single most important, and often contentious, decision every year. The decision is only made by reaching a consensus among the varying points of view.

Martin Luther King Jr observed that "A genuine leader is not in search of consensus, but a molder of consensus." There are so many aspects of life where this is applicable. King isn't advocating authoritarianism. He's saying that real leaders don't rely on preexisting agreement; they help create it. That often means starting with a minority viewpoint and gradually moving people toward shared understanding.

Seeking consensus can sometimes be an excuse for inaction or playing it safe. Molding consensus often involves taking unpopular stands and facing resistance — but it's this very perseverance that can ultimately unify people around a just cause.

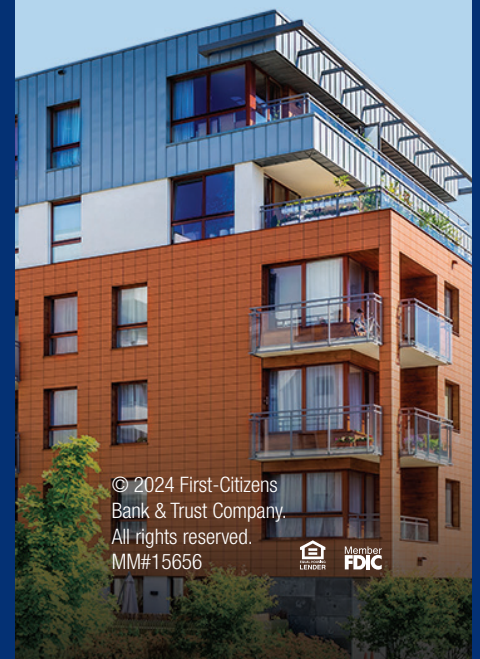
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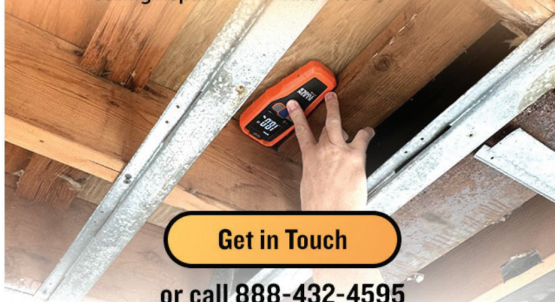
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Preserving Value: How AI-Enhanced Tools Empower Community Managers to Protect Physical Assets

Hooman Boland, CEO/Founder, MindMe Technology, Inc.

Introduction

Picture this: a storm rolls through, and your team discovers a leaking roof—too late to avoid costly repairs and homeowner complaints. What if you could spot these issues before they spiral? For community managers, protecting roofing, walls, pavements, parking structures, retaining walls, boundary barriers, hardscapes, and landscapes is a constant challenge. Add inflationary pressures on services and goods, staff retention struggles, and rising homeowner expectations for better service levels and tech-enabled efficiencies, and the stakes climb higher. This article isn't about chasing the latest trend—it's about understanding tools like 360-degree Digital Scanning, LiDAR, Infrared Detection, and AI-driven analytics, and what to learn about them to be more effective stewards. How can these fit your processes to proactively manage assets? Let's explore the problem, the tools, and the practical steps to make them work for you—and your homeowners.

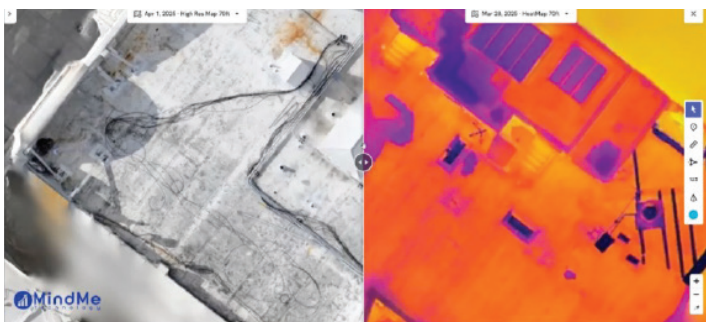
The Challenge of Protecting Physical Assets

Community managers face a tough reality: aging infrastructure—like cracked pavements or leaking walls—meets unexpected climate change impacts, like your roofing battered by wildfire ash. Inflation drives up repair costs, deferred maintenance snowballs into emergencies, and outdated wiring standards lead to excessive electric panel heat, risking safety and budgets.

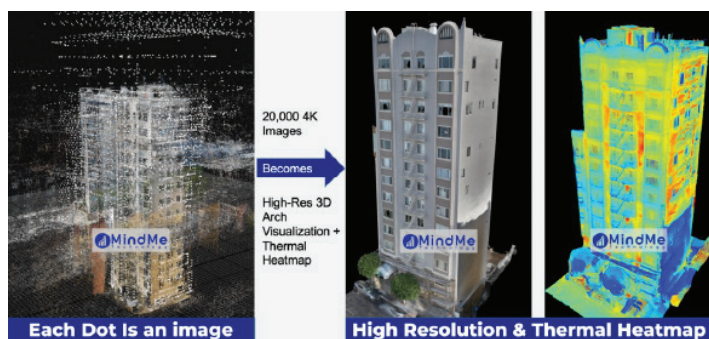
Homeowners expect more—faster fixes, modern solutions—while staff turnover disrupts continuity. Traditional approaches fall short: visual inspections miss hidden wear, like moisture behind siding, and reactive repairs drain reserves. These pressures hit operating costs, complicate maintenance planning, and strain team morale, all while homeowners demand satisfaction. The question isn't just *"How do you keep up?"* but *"How do you stay ahead of wear and tear you can't always see?"* Technology offers a way to shift from scrambling to strategizing, giving managers tools to predict and prioritize. It's not about replacing your know-how—it's about amplifying it with data to tackle these pain points head-on.

A Closer Look at AI-Empowered Tools

AI-enhanced technologies can transform how you manage physical assets. Here's what they do, simply put: 360-degree high-resolution Digital Scanning captures every external angle of your property in vivid detail. LiDAR Measurement uses lasers to map structures with pinpoint accuracy. Infrared Heat and Moisture Detection reveals hidden heat or water threats—like electric panel hotspots or wall leaks. AI, fueled by date/time/geo-tagged data, ties it all together, integrating inputs and predicting what's next.



Imagine scanning a roof surface to spot early wear, then letting AI analyze patterns to flag priorities.



Or picture stitching 20,000 images into a 3D architectural visualization, providing safe access and early visibility to remote, elevated, or hard-to-reach components—like rust-deteriorated supports on overhanging balconies of a 13-story building.

These tools don't just collect data—they offer visibility into the unseen and foresight to act before issues escalate. The value lies in understanding how they complement your workflow, reducing operating costs and maintenance headaches. So, where could you make them work for you?

Practical Applications for Community Managers

Let's see these tools in action with everyday scenarios:

- **Roofing & Siding:** Digital Scanning tracks roof wear after storms; Infrared pinpoints moisture behind siding; AI can predict and prioritize repair timelines to more effectively manage reserve budgets.
- **Pavements & Parking Structures:** LiDAR maps pavement shifts; AI forecasts resurfacing needs, keeping operating costs in check.
- **Retaining Walls & Hardscapes:** LiDAR detects subtle tilts; Infrared spots moisture risks; AI suggests fixes to avoid collapse complications.

- **Landscapes & Boundary Barriers:** Scanning monitors root impacts on barriers; AI predicts upkeep to maintain appeal.

These applications cut to the core of your challenges: reducing operating costs by catching issues early, avoiding deferred maintenance messes, and improving staff quality of life with fewer emergencies—less turnover, happier teams. Data shows deferred maintenance can cost up to 30 times more if problems go undetected, but these technologies spot issues at their earliest stages *without destructive testing*. That all boosts homeowner satisfaction through stable, well-kept properties. This isn't about replacing your expertise; it's about enhancing it with data to make smarter calls.

Questions to Consider Before Adopting

Thinking about these tools? Ask yourself: Can your team weave new data into current processes? How will you balance tech insights with your seasoned judgment? Are you ready to interpret predictive reports? This isn't a magic fix—it's a toolset requiring preparation. Start small rather than not starting at all—test one property before scaling up. Homeowners will notice the payoff: transparency in maintenance plans, longer-lasting assets, and controlled costs. It's an investment that, done smartly, paves a great road ahead—think long-term stability, not short-term ROI hype. These questions aren't roadblocks—they're stepping stones to figuring out what fits your operation and how to make it work for your team and homeowners.

Conclusion

Shifting from reactive to proactive asset management is within reach with AI-enhanced property health management tools. They help you see beyond the surface, predict what's coming, and act with precision—easing operating costs, maintenance burdens, and staff stress while delighting homeowners. Next time you walk your properties, consider what's hidden beneath the wear. Technology keeps evolving, but its real value lies in how you use it to protect what matters. This isn't about jumping on a bandwagon—it's about learning what works for you, step by step, to steward your assets smarter.

—Hooman Bolandi is CEO/Founder of MindMe Technology, a technology solution provider for industrial and residential property managers seeking streamlined operations, enhanced property health and improved quality of life. He can be contacted at hbolandi@mindmetechology.com or at MindMeTechology.com.



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Economic Forecast Meets Real-World Planning at CAI-OC's April Educational Luncheon

April 10, 2025

Racheal Solomon, DeNichilo Law, APC

CAI-OC's April Educational Luncheon drew a full house for an engaging and timely program: an economic update for 2025 and how it may impact our industry. With expert insights from Dr. Raymond Sfeir, Director at the A. Gary Anderson Center for Economic Research and the Argyros School of Business and Economics at Chapman University, and Ms. Genae Affrunti, Senior Vice President/Investments and Senior Financial Consultant at Capital Reserve Group, Comerica Financial Advisors, the presenters explained complex economic trends and forecasts for the United States, California, and Orange County economies.

The presenters discussed historic and real-time shifts related to interest rates, inflation, and the potential economic impacts of higher tariffs and immigration policies by the Trump administration. Following this broad economic overview, the discussion was skillfully narrowed to focus on the practical implications for California's real estate market and, more specifically, association investments. While the presenters emphasized that there is no crystal ball when it comes to predicting the economy, they expressed hope that short-term fluctuations and disruptions could ultimately pave the way for long-term stability and growth.

Overall, the luncheon successfully connected high-level financial forecasting with real-world decision-making and investment considerations related to our industry. Attendees left with insights not only into national and regional economic shifts, but also how to potentially apply that knowledge to their associations, businesses, and personal financial planning and portfolios.

Want to hear what your industry peers thought and how they are planning ahead in light of the economic forecast? Keep an eye out for the full article featuring expert highlights and candid feedback from CAI attendees. It's a must-read for anyone looking to understand how others are strategically preparing for what is ahead.



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Luncheon Speakers and Coordinators

(l to r): Robert Canchola (Kings III Emergency Communications), Racheal Solomon, Esq. (DeNichilo Law, APC), Genae Affrunti (Capital Reserve Group - Comerica Financial Advisors), Raymond Sfeir, Ph.D. (A. Gary Anderson Center for Economic Research & Argyros School of Business and Economics Chapman University) and Valerie Hernandez (Villa Park Landscape)



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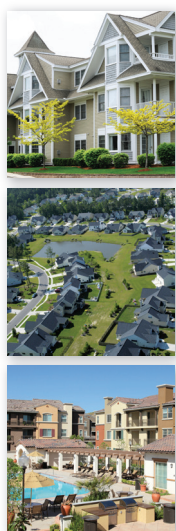
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Cooking Up Comfort:

Volunteering at the Ronald McDonald House Orange County

March 7, 2025

Nesreen Ibrahim, Antis Roofing & Waterproofing

The CAI Outreach Committee had the privilege of volunteering at the Ronald McDonald House, where Committee members prepared and served breakfast for the families staying there. This experience was more than just wrapping burritos and scrambling eggs; it was about creating moments of comfort for people facing some of the toughest life challenges.

The Ronald McDonald House provides a “home away from home” for families whose children receive medical care at nearby hospitals. It’s a place filled with resilience, hope, and an undeniable sense of community. As volunteers, we were honored to contribute in a small but meaningful way by preparing a warm breakfast to help start their day in a positive way.

Our menu included classic breakfast favorites: veggie and protein burritos and plenty of orange juice. From setting up the kitchen to cleaning up afterward, the experience brought our group closer together and reminded us of the impact that simple acts of kindness can have.

More importantly, it gave us a deeper understanding of the daily strength these families show. Many took a moment to stop by the kitchen to say thank you, but we were the ones who felt truly grateful for the opportunity to serve, connect, and share a little light in the lives of others.

We left the Ronald McDonald House with full hearts and a renewed appreciation for the power of community support. Volunteering here isn’t just about cooking meals; it’s about showing up with compassion, sharing smiles, and reminding families that they’re not alone.

We encourage anyone looking to make a difference to get involved with their local Ronald McDonald House. A few hours of your time can bring warmth and hope to families who need it the most.

If you would like to join the CAI-OC Outreach Committee, please contact Executive Director Denise Kennedy at executivedirector@caioc.org.



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Continued on page 14

Continued from page 13



Day at the OC Food Bank:

Canned Corn & Yams & Condensed Milk, Oh My!

April 26, 2025

Sabrina Willison, RS, Association Reserves Orange County

Members of CAI-Orange County and their guests gathered Saturday, April 26th, for another successful 'Day at the OC Food Bank' in Garden Grove. The OC Food Bank, a program of Community Action Partnership of Orange County, helps communities end hunger and malnutrition by partnering with more than 300 local charities, soup kitchens, and community organizations.

This annual event attracted over 40 CAI-affiliated volunteers who worked in assembly lines to pack boxes of food for low-income senior citizens throughout Orange County. These boxes contained non-perishable items such as canned goods, pasta, rice, and other staples that provide much-needed nutrition to those in need. Our amazing group of volunteers worked extremely hard and were able to pack 1640 boxes of food!

The Community Outreach Committee extends its sincerest THANK YOU to everyone who sacrificed their Saturday morning to give back to the community. We are truly "Building Better Communities" together!





The CAI-OC Outreach Committee Volunteers for the 3rd Consecutive Year at the HomeAid Orange County Diaper Drive

May 30, 2025

Jed Moyer, City Service Paving

HomeAid's Annual Diaper Drive aims to collect more than 1 million diapers, wipes, and baby food to support babies and toddlers of parents experiencing or at risk of homelessness. HomeAid, in partnership with OC Diaper Bank, hosted the event at The District at Tustin Legacy. The Outreach Committee members delivered over 10,000 diapers and wipes graciously donated by Chapter members.

Committee member volunteers also helped to direct traffic and offload, sort, and collect donations from other donors. The music, food, and decorated booths made the event feel like a festival. The Committee looks forward to volunteering again next year and are thankful to have such charitable partners in our community.

Thanks to all those who donated diapers this year to help HomeAid reach their annual goal.



Are You Staying Ahead of the Surge?

Checking In on Your Preparations for a Greener Future

Scott Clements, RS, PRA, CMI of Reserve Studies Inc., Daniel C. Heaton, Esq. of DeNichillo Law, APC and Cyrus Koochek, Esq. CCAL of SwedelsonGottlieb



EDITOR'S NOTE: During the Chapter's April 2024 educational luncheon, "Getting Ahead of the Surge," speakers discussed new regulatory requirements designed to reduce pollution as well as possible courses of action for associations to meet their legal obligations and use limited resources more effectively. This article is intended to help community leaders continue those preparations and be ready to meet a future that likely was not envisioned when their community was built.

California's governor established aggressive statewide targets in September 2020 to accelerate the shift toward zero-emission vehicles and equipment by 2035 **where feasible**. This and other regulations have created a comprehensive approach to meeting certain outlined milestones. With multiple boards, agencies, and building authorities implementing standards to further the goal of zero emissions, there will be a significant impact on property ownership and management. The following are some of the most impactful changes affecting community associations.

AB 2075, chaptered in 2022, required the establishment of mandatory building standards for the installation of future electric vehicle charging infrastructure for parking spaces in multifamily dwellings and non-residential developments. The new law requires installation of Level 2 **Electric Vehicle Charging Stations (EVCS)** in **new construction**. Additional standards require that at least 25% of parking spaces in new multifamily developments be EV Ready, with another 5% equipped with installed Level 2 charging stations. The California Green Building Standards Code (CALGreen) (Cal. Code Regs. tit. 24, pt. 11) requires installation of Level 2 electric vehicle charging stations in new construction. These requirements will be updated, potentially increased, and codified in building and electrical code supplements. Communities should realize that these regulations may be applied to existing facilities when a permit application is submitted for certain retrofits, additions, or alterations.

The CA Department of Housing & Community Development implemented requirements for installation of EVCS in **existing facilities** pursuant to AB 1738 (2022). Community associations should ensure that their contractor review the revised standards for retrofits, additions, or alterations to existing parking facilities.

It is crucial for community managers and homeowner leaders to survey their membership to gauge the future desirability of EVCS in their communities and consult with experts, such as licensed electrical and mechanical engineers and general contractors, to determine what alterations to the existing systems will be necessary to meet both current and looming statutory requirements, along with any potential additions the membership may seek.

Between the EVCS requirements and the California Air Resources Board (CARB) 2022 State Implementation Plan, significant new electrical capacity may be required in many community associations, including townhouse, midrise and tower-style condominiums. Once a community has a clear understanding of their needs and desires relating to EVCS, they can then begin the budgeting and planning process to install the required new electrical capacity.

AB 1346, chaptered in 2021, amended the Health & Safety Code to require the CARB to adopt regulations requiring zero emissions from new **small off-road engines ("SORE")**, which are primarily used in lawn and garden care. The sale of new gas-powered SORE in California was banned at the start of 2024, although the statute allows continuing use and repair of existing gas-powered equipment. The regulation includes gas-powered mowers, edgers, hedge trimmers, leaf blowers, pressure washers, some riding mowers, and chainsaws with less than 45cc engines. In 2028, the ban will expand to also include portable gas-powered generators under 25HP. Professional landscapers will, over time, need to replace their equipment with electronically powered devices, procure additional batteries for continued use, charge, and transport these batteries, and will likely pass the added costs along to their community association clients. (See OC View, "California Will Go from Gas to Electric Powered Lawn Equipment," Jan.-Feb. 2023.)

CARB has implemented regulations targeting a 100% zero-emission transition for SORE by 2035, where feasible. This encompasses equipment such as lawnmowers, leaf blowers, and portable generators. Associations should prepare for phased implementation and consider budgeting for the transition to compliant equipment.

In September 2022, CARB implemented Resolution 22-14, which will prohibit the purchase of new space/water heaters unless it is a zero emissions unit, starting in 2030. This restriction will apply to new equipment in both residential and commercial applications. In practical terms, as gas-powered water heaters and heating systems age out and require replacement, they must be **replaced by zero-emissions equipment**, meaning tens of thousands of

devices and the energy systems they rely upon will need to convert from natural gas or petroleum-based products to electricity. In some applications, these changes will be limited; in others, they may create significant one-time conversion costs or greater ongoing service and maintenance costs. Those responsible for the long-term maintenance and financial stability of their communities would be well served by seeking expert advice on the impact that these regulatory changes will have on their community finances. (See OC View, “Are California’s Condominium Associations in Hot Water?” Nov.–Dec. 2023.)

Refrigerants and Light Bulbs

Your community probably has begun to feel the impact of limitations on the production and sale of certain refrigerants and multiple types of lighting equipment. For example, SB 1206 was chaptered in September 2022, and curtails the manufacture of common refrigerant gas types, such as hydrofluorocarbons (“HFCs”) based on their assigned Global Warming Potential (“GWP”). Most pre-2010 installed A/C systems utilize R-22 Freon refrigerant, which has been illegal to produce since 2020. Common replacement systems utilize R-410A, which has a 2,090 GWP and will not be permitted to be manufactured either starting in 2030. This means that depending on the availability of recycled older refrigerant gas and parts, the above phase out dates could significantly impact the planned life of A/C units in a community’s reserve studies. (See OC View, “Your Association and Member-Owned HVACs are almost Obsolete,” September/October 2023 issue.)

Starting in 2024, AB 2208 prohibited the sale of mercury-containing lighting, specifically certain types of fluorescent and compact fluorescent lamps. Screw-in or bayonet-based lamps and pin-based and linear fluorescent lamps are prohibited. Associations should already be in the process of trying to convert plug-in and screw-in CFLs to LEDs and engage electricians to replace other fluorescent lamps with new LED fixtures. The simplest plug-and-play-type LED lamps become more cost-effective when buying in bulk. (See OC View, “What Do You Mean, ‘I Can’t Buy a Replacement CFL?’” November/December 2023 issue.)

As of the spring of 2025, the phase-out of high Global Warming Potential (GWP) refrigerants is underway, affecting the maintenance and replacement of HVAC systems. Additionally, the ban on specified mercury-containing lamps is in effect.

Associations that have not assessed their current equipment and developed and implemented plans for necessary upgrades to comply with these regulations will be competing with other homeowners, businesses, and communities that also failed to get ahead of the curve. The impact on an association’s budget could be substantial, as these regulations may **require the replacement of heating and air-conditioning equipment, light fixtures, service lines, utility electrical panels, and possibly an upgrade to the community’s electrical service capacity from the power company.** All of which would require significant financial investment from association members.

Solar Power

continues to be a popular alternative for some communities despite California Public Utility Commission changes in Net Metering having affected the cost to owners of solar power photovoltaic systems.

In circumstances where homeowners have exclusive use common area available for application of panels, the usage rate is high. In apartment or townhouse style properties, where installation of solar panels may be limited, the demand may be limited by the available common area. Homeowner leaders and community management should consult with legal counsel, insurance brokers, and qualified, licensed service providers to determine the best course of action for your specific community.

Financial Implications

CAI updated its Reserve Study Standards of Practice (SOP) in 2023. The updated standards included emphasis on 30+ Useful Life expectancy components, such as potable plumbing systems or elevator modernizations that may have an extended life expectancy, but not an indefinite life expectancy. The inclusion of these long-life components helps to ensure the community is funding all its assets over the life span of the equipment and not just requiring expenses to be shouldered by the ownership group at the time of replacement.

Additionally, the updated standards recognize the need for non-physical items to be included in the component inventory. These might include structural inspections, such as the Exterior Elevated Elements Inspections required by Civil Code § 5551, also known as SB 326, the Balcony Bill, which are now required to be conducted at least once every nine years. Other non-physical items that may now meet the definition of a component in the updated SOP include reoccurring structural or geotechnical reviews, the creation and regular updating of a community maintenance manuals and activity logs, and (potentially) necessary amendments or restating of the CC&Rs. However, boards should consult their legal counsel about whether they are able to use reserve funds for these types of services. Including such updated information in an association’s reserve studies and component inventories will help create more awareness by the board and members of various component responsibilities and the services necessary to properly maintain the community and funding required across the component lifecycle.

Given the complexity and evolving nature of the above regulations, associations should engage their professional experts (legal counsel, licensed engineers, and qualified reserve analysts) to ensure that they are navigating compliance effectively. Boards should also keep their membership regularly informed about ongoing (and additional upcoming) changes so that there can be collective preparedness for the inevitable impact that these issues will continue to have on communities.

While personal opinions may vary as to the value of these environmentally-based changes, it is undisputed that these changes will have a significant impact on how your community maintains its assets and amenities. Homeowner leaders and community managers should continue to educate themselves and their members about how the above regulations will impact their community, so that they can be better prepared for the inevitable changes that have occurred and are still coming.



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CAI-OC 2nd Annual Pickleball Tournament:

Dink Shots and Aces Abound

May 1, 2025

Almost 150 pickleball enthusiasts and wannabe picklers came together on a beautiful day to take part in CAI-OC 2nd Pickleball Tournament. Players enjoyed an afternoon filled with friendly competition, camaraderie, and plenty of “dinking” and “volleying.” The tournament took place on Thursday, May 1st, at the Tustin Hills Racquet Club and included a clinic for the newbies, a delicious BBQ lunch, refreshing ice cream, and several hours of competitive tournament play.

Thanks to the sponsors and players and a big congratulations to our winners!

Intermediate:

1st Place: Shayna Johnson and Steven Berkus of P.W. Stephens Environmental Inc.

2nd Place: Cierra Boez, Stay Green, Inc. and Louie Barrientos, FirstService Residential, AAMC

3rd Place: Jeanne Costello and Tom Nee of Laguna Woods United Mutual

Beginner:

1st Place: Kayle Thompson and Griffin O’Conor of Labarre/Oksnee Insurance

2nd Place: Diane Weissberg and Andrew Scoble of Fiore Racobs & Powers, A PLC

3rd Place: Steve Seely, Stay Green, Inc. and Steven Perez, Revolve Property Management

It’s safe to say that the CAI-OC’s Pickleball Tournament is a favorite and will be returning for years to come, so stay tuned and be ready for next year!



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Deferred Maintenance: The Hidden Costs of Aging HOA Properties in Orange County

Tina Neubauer, CMCA, CIRMS, NEXTIER Insurance Services, Inc.



“HOAs that wait too long to address known maintenance issues are likely to pay more in repairs, in liability claims, and in insurance premiums.”

How Deferred Maintenance Impacts Insurance Costs, Increased Risk Equals Higher Premiums

When an HOA's infrastructure is visibly deteriorating, insurance carriers take notice. Electrical systems, in particular, pose serious risks. Communities with outdated components like aluminum wiring or legacy panels, such as Zinsco or Federal Pacific, are flagged as high fire risks. These issues can lead to dramatic insurance cost increases. One HOA in Southern California, for example, saw premiums jump by more than 600% after an inspection revealed unsafe electrical panels. Even with upgrades underway, their options for affordable coverage became extremely limited.

Underfunded Reserves Raise Red Flags

Carriers don't just assess physical risks; they also examine financial ones. Associations that can't demonstrate adequate reserve funding are viewed as less capable of handling emergencies. A lack of reserves can delay necessary repairs, which increases the risk of damage and claims. Insurers often request reserve studies or financial statements to ensure the HOA is equipped to manage its responsibilities. If those documents suggest poor planning or underfunding, the HOA may face unfavorable policy terms or even denial of coverage.

Liability Risks Escalate Exposure

Deferred maintenance isn't just about structural decay, it creates real safety hazards. Broken stair treads, cracked sidewalks, non-functioning lighting, or unstable balconies all increase the likelihood of injury. While insurance policies

don't cover maintenance itself, they do respond to third-party liability. If someone is injured due to an unaddressed hazard, the HOA may face a lawsuit, and insurers may be reluctant to cover future claims. Associations can also be found negligent for failing to act when hazards are identified.

Securing Coverage Becomes Challenging

Repeated maintenance-related claims or obvious signs of disrepair can drive insurers away. In today's hardening insurance market, many carriers are exiting the HOA space altogether. This leaves fewer choices, particularly for older communities. Without evidence of upkeep and improvements, the HOA may find itself placed with surplus lines carriers, often at significantly higher costs and more limited coverage. Associations that are proactive in addressing risks stand a much better chance of securing standard, competitively priced coverage.

Structural Failures Lead to Catastrophic Outcomes

The financial and human cost of structural failure can be devastating. Balcony collapses, roofing failures, and plumbing system breakdowns have led to injuries, lawsuits, and repair bills that dwarf the cost of routine upkeep. California's Senate Bill 326 (the 'Balcony Bill') was introduced in response to such risks. It mandates regular inspections of elevated exterior elements, like balconies, decks and walkways, to ensure resident safety. While some board members may not yet be fully familiar with the law's specifics, the message is clear: failure to maintain structural components can result in serious legal and insurance consequences.

Proactive Measures to Safeguard HOA Communities

To reduce risk, maintain property values, and ensure accessibility, boards must take proactive steps. The following strategies provide a roadmap for better long-term planning and operational success:

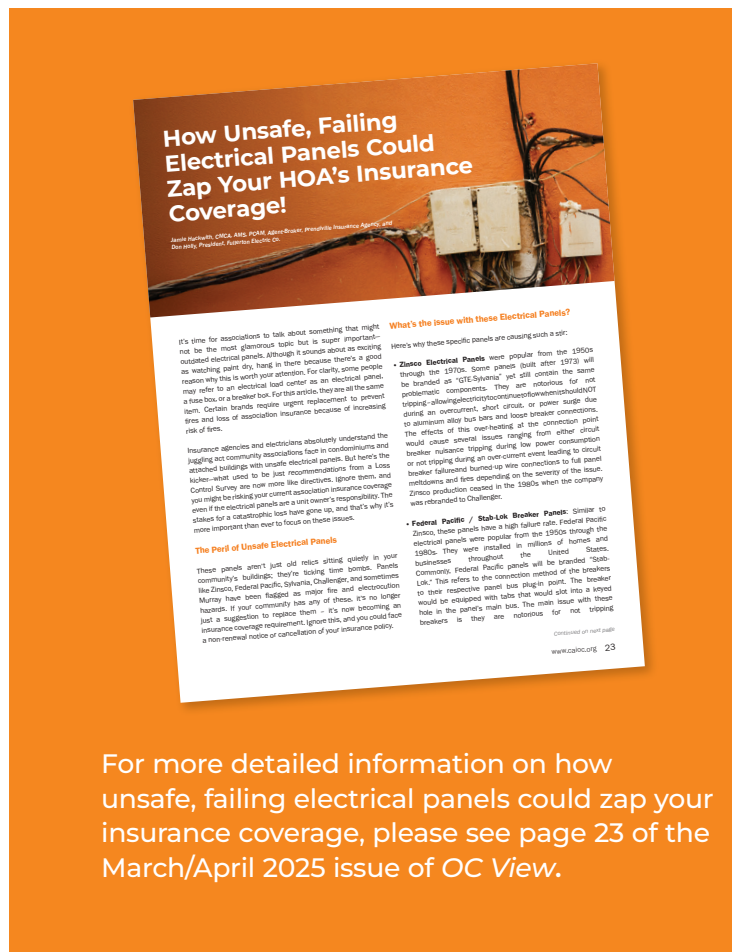
- **Regular Property Inspections**
Hire qualified inspectors to regularly assess building systems, exterior components, and common areas. Independent third-party assessments often catch issues early before they escalate.
- **Comprehensive Maintenance Planning**
Use inspection findings to build a multi-year maintenance plan. Prioritize high-risk issues and stagger less urgent projects to avoid overwhelming budget increases.
- **Bolstering Reserve Funds**
Associations should commission updated reserve studies every year, including an update with on-site inspection every three years, and adjust contributions accordingly. Following the reserve funding recommendation provided by the reserve analyst will help reduce the potential for future special assessments. Ensure that all reserve components are accurately listed and accounted for in the reserve study.
- **Collaborating with Experienced Insurance Brokers**
Partner with brokers who specialize in community associations. They understand the nuances of HOA risk and can advocate on your behalf during underwriting.
- **Prioritizing High-Risk Repairs**
Immediate attention should go to life safety issues like faulty wiring, dry rot, loose railings, and trip hazards. Prompt repair of these items reduces the risk of claims.
- **Educating Homeowners on Maintenance Needs**
Host annual meetings or send quarterly newsletters that explain key projects, reserve funding rationale, and the importance of preventative work.
- **Exploring Alternative Funding Options**
For major projects, investigate HOA-specific loan programs or grant opportunities. A well-structured loan can help avoid burdensome special assessments.
- **Implementing Preventative Maintenance Programs**
Establish monthly, quarterly, and annual maintenance tasks for key building systems. Preventative efforts reduce the frequency and severity of breakdowns.
- **Leveraging Technology for Maintenance Management**
Tools like maintenance tracking software or app-based work order systems help streamline repairs, reduce delays, and document the HOA's efforts.

Real-Life Consequences of Deferred Maintenance

Consider the case of an Orange County HOA that failed to upgrade aging electrical panels flagged by inspectors. After two small electrical fires and growing concern from residents, the community was dropped by its insurance provider. The board was forced into a last-minute scramble to find coverage, ultimately accepting a new policy at more than seven times the previous cost and with fewer protections. Once the new panels were installed, the HOA eventually secured better coverage, but only after months of stress and a major hit to the budget. This case illustrates how ignoring deferred maintenance not only puts lives and property at risk, but it can also severely limit insurability and destabilize financial planning.

The Cost of Inaction is Too High

HOAs that wait too long to address known maintenance issues are likely to pay more, in repairs, liability claims, and insurance premiums. In worst-case scenarios, they may become uninsurable, threatening the very viability of the community. By investing in proactive inspections, planning, and repairs today, HOA boards can ensure their communities remain safe, marketable, and financially sound for decades to come. The time to act isn't when a problem becomes unmanageable, it's now.



Well Prepared Reserve Studies Can Help You Stand Strong in a Shifting Insurance Market

Erik Sundquist, RS, SMA Reserves, LLC

California's community associations are facing one of their most difficult financial challenges in decades: insurance coverage is becoming harder to secure and dramatically more expensive.

Premiums are rising, deductibles are ballooning, and in wildfire-prone regions, many carriers have stopped writing new policies altogether. For board members and managers, this shift is more than an insurance issue—it's a community stability issue. Two of the most overlooked tools in navigating this crisis are a component-complete reserve study and adequately funded reserves.

A Changing Insurance Landscape

HOAs that once received several insurance quotes are now lucky to get one or two. Where premiums used to feel manageable, increases of 30 percent or more year-over-year are becoming common. Some associations have seen their coverage dropped altogether, forcing them to scramble for policies that are often more limited and more expensive. This trend is particularly evident in areas designated as high wildfire risk, where the threat of catastrophic loss looms large.

In a recent episode of "The Maintenance Manager" podcast, Cory Neubauer of Next Tier Insurance emphasized how California's insurance challenges mirror the catastrophe-driven markets of states like Florida. He discussed how natural disasters such as wildfires, combined with inflation and regulatory pressures, have created a "perfect storm" for insurance providers. The result has been stricter underwriting, fewer options, and skyrocketing premiums for community associations.

Neubauer stressed the need for board members to understand their policies, particularly exclusions and coverage limits. He encouraged frequent engagement with brokers, proactive maintenance, and careful risk communication as strategies to help HOAs weather these shifts. His advice echoed a core truth: communities that are informed,

proactive, and well-documented stand a better chance of staying protected and insured.

That's where a reserve study comes in.

The Value of a Current Reserve Study

A reserve study does more than forecast roof replacements or paint cycles. It signals to insurers that your association understands its physical assets and has a plan to care for them. When insurers see an HOA with a current, professionally prepared reserve study—especially one showing adequate funding—they see an association that takes risk seriously.

Insurers often ask about the condition of common area components, recent major projects, and whether the association has funds to cover high deductibles. A solid reserve study answers those questions before they're even asked. It can demonstrate that the community has planned for the inevitable and isn't reliant on emergency measures or surprise assessments.

Reserve studies also provide the roadmap for timely maintenance, estimating when roofs will need to be replaced, when painting should occur, and how long elevator systems are expected to last. Associations that follow this roadmap are better equipped to maintain the integrity and safety of their properties, which directly reduces risk.

Reserves and Risk Management

The hard market has forced many associations to consider higher deductibles as a way to control premiums. However, boards should carefully consider the impact of higher deductibles on the board's ability to fund necessary common area repairs after a casualty loss using the reserve account. A high deductible only makes sense if the association has money set aside to cover it, or the homeowner has money set aside (or insurance proceeds on the homeowner's policy) to cover it when the deductible is the responsibility of the homeowner.

Without adequate reserves, a community might be forced to delay critical repairs or assess owners on short notice.

Properly funded reserves also help prevent small problems from becoming big ones. Deferred maintenance increases risk, and risk is what insurance companies want to minimize. An HOA that keeps up with its painting, roofing, and other common area needs is a safer bet. It demonstrates that the association is actively managing risk, not just reacting to it.

Neubauer's insights reinforce this: the condition of a community's property and its ability to address wear and tear before it leads to claims directly influence how insurers assess and price risk. Proactive maintenance isn't just good stewardship—it may lower premiums and keep coverage accessible.

Financial Stability = Insurability

Insurers aren't just looking at brush clearance and roof type. They're also looking at the financial health of the association itself. Underwriters often review reserve balances, special assessment history, and whether the board has a track record of following its reserve study.

An association with low reserves is more likely to delay projects, levy unpopular assessments, or face legal exposure. One with healthy reserves and a proactive funding plan is in a stronger position to weather both physical and financial storms. More importantly, it demonstrates leadership that anticipates challenges rather than simply responds to them.

In some cases, insurers may even consider reserve levels when determining policy terms. A well-funded HOA may be in a stronger negotiating position, able to justify higher deductibles or request coverage adjustments because it has the financial cushion to manage risk. It's a virtuous cycle: good reserves support good insurance, and good insurance protects the long-term viability of the community.

Clarity in a Complex Market

Reserve studies aren't just about long-term planning. In today's insurance market, they are risk management documents. They speak to insurers, lenders, and members. They help boards make smart decisions under pressure. And they give communities a clearer path forward when facing a rapidly shifting financial landscape.

Board members may feel overwhelmed by the current market. What used to be a relatively straightforward annual renewal process now requires strategic thinking and documentation. Managers may be tasked with explaining significant premium hikes to owners. In this environment, clarity and preparation are critical.

That's where reserve study preparers come in. By providing boards with accurate, timely, and easy-to-understand studies, they help communities navigate these financial headwinds.

The reports don't just serve as planning tools, they provide credibility. They show that an association is thoughtful, informed, and prepared.

The Path Forward

As this insurance crisis evolves, one thing remains clear: associations that prioritize planning and preparation will fare better than those that do not. While we can't control the actions of insurers or the impacts of climate change, we can control how we prepare. Ensuring that there is a complete and accurate reserve study is a powerful first step.

It ensures that the association knows what's coming, how much it will cost, and when action is needed. It gives boards the confidence to make informed decisions and the documentation to support those decisions with members, lenders, and insurers alike.

In a world where risk is rising, preparation is protection. For every board member wondering how to keep premiums manageable, and for every manager wondering what insurers want to see, the answer may begin with a simple question: "Is our reserve study complete and accurate?"

"In today's insurance market, a well-prepared reserve study is more than a planning tool—it's a statement of financial strength and risk awareness."

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May Luncheon Recap:

Expense Explosion

May 21, 2025

Robert Canchola, Kings III Emergency Communications

More than 300 attendees participated in the May 21, 2025, educational luncheon titled "Expense Explosion." The discussion focused on the never-ending rising HOA costs and how to manage them, and was led by Scott Clements, RS (Reserve Studies, Inc.), Cory Neubauer (NEXTIER Insurance Services, Inc.), and Kyle Wolack (Keystone, AAMC).

Scott, Cory, and Kyle dove into relevant topics that were high priorities for the audience, including, "What's Driving the Surge?," "Smart Cost Control," "Strategic Property Management," "Reserve Studies with Purpose," and "Financial Transparency that Builds Trust." If you missed the luncheon but are interested in learning more, the three speakers are collaborating on a more detailed summary of their presentation that will be published in a future issue of the OC View.



Luncheon Speakers and Coordinators

(l to r): Robert Canchola, Kings III Emergency Communications; Cory Neubauer, Nextier Insurance Services; Kyle Wolack, Keystone, AAMC; Scott Clements, RS, Reserve Studies Inc.



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Mastering the PCAM Case Study: Strategies for Success

Tiani Bobitch, CMCA, AMS, PCAM of Seabreeze Management Company, Inc., AAMC



“Be kind to yourself. This process is tough, but you’ve made it this far for a reason. ...While the journey may feel overwhelming at times, proper preparation, time management, and resilience will set you up for success.”

In the May-June edition of OC View, I shared my journey into the community management industry, my decision to pursue the Professional Community Association Manager (PCAM) designation, and the challenges I faced during the case study process. The case study is the final step for community managers to earn their PCAM designation. The participant spends time reviewing a community and then writes a final exam paper in response to a series of questions submitted to them. If you haven’t had a chance to read my previous article yet, I encourage you to do so, as it provides insight into what it takes to earn this prestigious credential and the emotional and professional hurdles along the way.

Now, in this second installment, I want to share the lessons I learned and the strategies that helped me succeed. The PCAM case study is designed to be challenging, and proper preparation can make all the difference. Below are the critical takeaways and tips that I wish I had known before beginning my case study. It is important to note my participation was in a virtual case study and completely online, so advice may vary for in-person opportunities.

Getting Ready – Steps Before the First Day

- Take the full 30 days off work, if possible. Giving your paper undivided attention can be a game-changer.
- Gather all prerequisite course materials. Review content from the Professional Management Development Program (PMDP) courses. Having it readily accessible will save valuable time.
- Utilize additional resources. The Generally Accepted Practice (GAP) reports from CAI’s online bookstore can be incredibly useful.
- Line up your experts. Connect with attorneys, CPAs, insurance agents, and contractors ahead of time so you can reach out with questions as needed.
- Review host community documents in advance. Print and organize them so you can reference them easily during interviews.
- Research state-specific laws. If your case study is in a different state, familiarize yourself with relevant regulations.
- Set up a distraction-free workspace. Whether at home, a library, or another quiet location, ensure you have everything you need to stay focused.
- Install helpful tools. A grammar assist program like Grammarly and a design tool like Canva can enhance the quality of your submission.
- Ask for support. Let a trusted friend, relative, or mentor know about your journey so they can encourage you along the way.

Getting Familiar – During the Case Study

- Make sure your environment is comfortable. Have a jacket, socks, and anything else you might need for long study sessions.

- Eat beforehand and have snacks on hand. Staying fueled will help you maintain focus.
- Take detailed notes. Write down key points and timestamp them to reference recordings more efficiently.
- Ask every question that comes to mind. There are no bad questions—clarification now can save time later.
- Thoroughly review exam questions. Digesting the prompts the same day they are revealed helps with planning your approach.

The Adventure – Writing the Paper

- Set daily goals. Aim to complete at least one or two parts of a question each day.
- Develop an outline first. Jot down key points before refining responses.
- Identify which questions require expert input. Reach out early to coordinate their availability.
- Answer in the order that works for you. You don’t have to follow the order provided.
- Don’t dwell on difficult questions for too long. Move on and return later with a fresh perspective.
- Review, edit, and review again.
- Don’t stress over page count. Some pass with fewer pages—the quality of your responses matters more.
- Submit your paper, even if it is incomplete. There’s still a chance of passing.
- Prepare for the waiting period. Results may take 30-60 days, so be patient and stay positive.
- Be kind to yourself. This process is tough, but you’ve made it this far for a reason.
- Celebrate your accomplishment. Submitting the paper alone is a significant achievement—reward yourself for the effort!

Final Thoughts

The PCAM case study is designed to challenge even the most experienced community managers. While the journey may feel overwhelming at times, proper preparation, time management, and resilience will set you up for success. Remember, you are not alone in this process—lean on your peers, mentors, and support system when needed.

To those currently preparing for their PCAM, I hope these insights help make the process smoother and less daunting. Stay focused, trust your experience, and give yourself the grace to learn and grow throughout the journey. Wishing you all the best as you take this next big step in your career!



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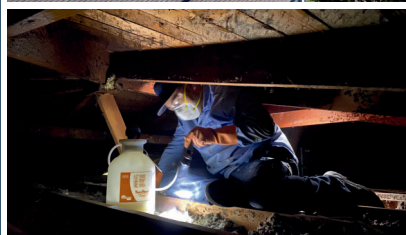
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Building an Annual Fiscal Year Budget:

A Treasurer's Perspective

Richard Williamson, Citrus Square Community Homeowners Corporation and
Sean Andersen, RS, Association Reserves Orange County

A well-planned calendar of events with tasks, actions, and milestones is required to ensure an association's annual budget is developed to comply with the law. An association's annual budget should be developed with research that provides a solid basis of estimates for planned operating costs. Associations are required by California's *Davis-Stirling Common Interest Development Act* to deliver a balanced budget, which can only be achieved when the projected expenses equal the assessments levied.

For an association's treasurer and community manager, the easiest component of an annual operating budget to complete may be the reserve funding element. A professionally-developed reserve study with all components meeting CAI's new Reserve Study Standards serves as the basis of an association's reserve funding budget plan. Synchronizing the reserve study process with the operating budget development is essential to creating the best estimate of the next fiscal year assessment requirement.

Milestones for a January to December Fiscal Year

The majority of community associations have a December 31st fiscal year end, therefore we will be using milestones in accordance with a December 31st fiscal year end.

Next January's budget development should begin in the first week of July (or earlier) under optimal circumstances to allow plenty of time for research and discussion by the board prior to approval. To accomplish this, preparations should be made to begin the reserve study in a timely manner. Bids for the reserve study should be presented to the board of directors in April or May. This will allow the reserve analyst to begin work and produce a draft to the board of directors in July. The community management team and board treasurer begin pulling together elements of the annual budget using six months of actual data from the June 30th end of month financials. The process of capturing and analyzing the cost data takes time.

If an association depends on a community management company to develop the budget, associations must allow more time for these products to be developed. Managers have “n” number of communities they conduct this process for annually. A proactive and knowledgeable treasurer’s involvement can make the process work more efficiently and effectively by partnering with the management team.

Data such as utility *actual* consumption versus *planned* consumption can be used to project the next fiscal year’s utility costs by capturing the utility rate increases approved by the Public Utility Commission. Requests to business partners regarding the following year’s service contract costs are transmitted with an end of August requested return date.

The community manager provides six month actual reserve expenditure data to the reserve study analyst along with planned reserve work projected costs for the next six months. Accurate reserve fund expenditure reporting impacts the quality of the reserve study development process through quality and accuracy of data provided by an association. This data will help to project an accurate starting reserve balance as well as create an accurate cost history in the component list.

During July the reserve analyst develops a draft study for the board to review. Optimally, the draft is provided to the board as soon as it is available for review and comment or questions back to the analyst. The final version of the study is normally revised and finalized once the September financials provide nine months of data for review and adjustments to operating and reserve study cost estimates. This provides the best understanding of actual expenditures and a shorter projected three months of cost data to yield the best estimate budget for board review, discussion, and approval in October.

September is an important month to capture annual cost inflation increase data. Understanding CPI, PPI, and CPE data is important to assess contract cost increases requested from business partners. The Bureau of Labor Statistics provides Consumer Price Index (CPI) and Producer Price Index (PPI) data in the middle of each month. The Bureau of Economic Analysis provides the Personal Consumption Expenditures Price Index (PCE) at the end of the month. Many people grab the first number published and use it to talk about inflation. However, for association budgeting, a deeper look into the numbers is important. One area of inflation – services – impacts service contracts fairly accurately based on actual experience. It also provides a baseline number to use to determine if a business partner’s contract cost increase may be too high and the contract should be negotiated.

Unfortunately, for the reserve analyst, projecting 30-year cost increases is not so simple. Most of the reserve study projected costs are informed by multiple construction cost inflation indices (CCII) which have a very wide range of cost increases annually. The best CCII tools estimate construction cost inflation by building trade for two years with any degree of confidence. To project out over a 30-year component lifecycle, historical data is used to develop the best approximate estimates across the building trades.

The board needs to hit its milestone of October 30th budget approval and adoption to enable the community management team to produce and transmit the next fiscal year’s budget, reserve study, and state-required disclosures to the association membership. Some associations may have governing documents requiring more than California’s minimum 30-day prior to end of current fiscal year notification requirement which need to be factored into the budget development timeline. For the community management company, November 15th to 29th is an “All Hands On Deck” event which takes priority over almost all other management actions. Boards that delay budget approvals past November 1st risk extra costs to the association to produce the budget and disclosure package on time, or risk losing the ability to use the new budget and assessment without a vote of the membership due to logistical challenges involved with distributing the budget to the membership on time.

“A well established plan of actions and milestones will make the annual budgeting process run smoother for your association.”

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The CAI-OC Education Committee wrapped up our 2025 HOA U Series and Bonus Courses. Thank you to our speakers and sponsors!

January 28th - Legislative Update

Dyanne L. Peters, Esq., Tinnelly Law Group
Constance Trinh, Esq., Whitney | Petchul

May 6th - Community Association Law

James C. Harkins, Esq., Cane & Harkins LLP
Daniel C. Heaton, Esq., DeNichilo Law, APC

May 13th - Finances & Reserve Studies

Mallory Paproth, SCT Reserve Consultants, Inc.
Janet Salmon, CMCA, AMS, Seabreeze Management Company, Inc., AAMC
Richard Williamson, Citrus Square Community Homeowners Corporation

May 20th - Community Association Insurance

Sabrina Davoodian, CMCA, AMS, PCAM, Powerstone Property Management
Michael Berg, CMCA, CIRMS, Berg Insurance Agency in Partnership
with LaBarre/Oksnee

May 27th - Maintenance, Construction Contracts & Bidding

Dyanne L. Peters, Esq., Tinnelly Law Group
Travis Pettit, Antis Roofing & Waterproofing
Karen Thompson, CMCA, AMS, PCAM, Keystone, AAMC

June 10th - Investing for the Future of Your Association

Genae Affrunti, Capital Reserve Group - Comerica Financial Advisors
Richard Williamson, Citrus Square Community Homeowners Corporation

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July

July 31

Concert for CLAC
5:30 p.m. - 8:30 p.m.
Cook's Corner

August

August 5

Goal Setting Workshop by Emerging Leaders Committee
10:00 a.m. - 12:00 p.m.
Lake Forest II Community Association

August 14

Flamingo Bingo
5:30 p.m. - 9:00 p.m.
Tustin Ranch Golf Club

August 24

Beach Clean Up
10:00 a.m. - 2:00 p.m.
Bolsa Chica State Beach

August 26

Symposium & Expo
9:00 a.m. - 4:30 p.m.
Irvine Marriott

September

September 10

HOA U Bonus Course - Architectural Review
6:00 p.m. - 7:30 p.m.
Virtual

September 12

CMCA Study Group
9:00 a.m. - 2:00 p.m.
CAI-OC Office

September 19

Manager's Breakfast
8:30 a.m. - 10:30 a.m.
Crown Valley Community Center

September 30

Bowling Tournament
5:30 p.m. - 8:30 p.m.
Bowlero, Tustin

October

October 9

Educational Luncheon
11:00 a.m. - 1:30 p.m.
Hilton Costa Mesa

October 15 & 16

Board Leader Certificate Program
9:00 a.m. - 11:30 a.m.
Virtual

October 16 & 17

PCAM Case Study - In-Person
Orange County

October 20

Pirates Classic Golf Tournament
10:00 a.m. Shotgun
Arroyo Trabuco Golf Club

October 29

PCAM Reception
5:30 p.m. - 7:30 p.m.
The Colab Space

November

November 5

Educational Luncheon
11:00 a.m. - 1:30 p.m.
Hilton Costa Mesa

November 12

HOA U Bonus Course - Records Retention
6:00 p.m. - 7:30 p.m.
Virtual

December

December 17

Holiday Social
5:30 p.m. - 8:00 p.m.
Arroyo Trabuco Golf Club

For a complete list of Chapter events, please visit www.caioc.org.



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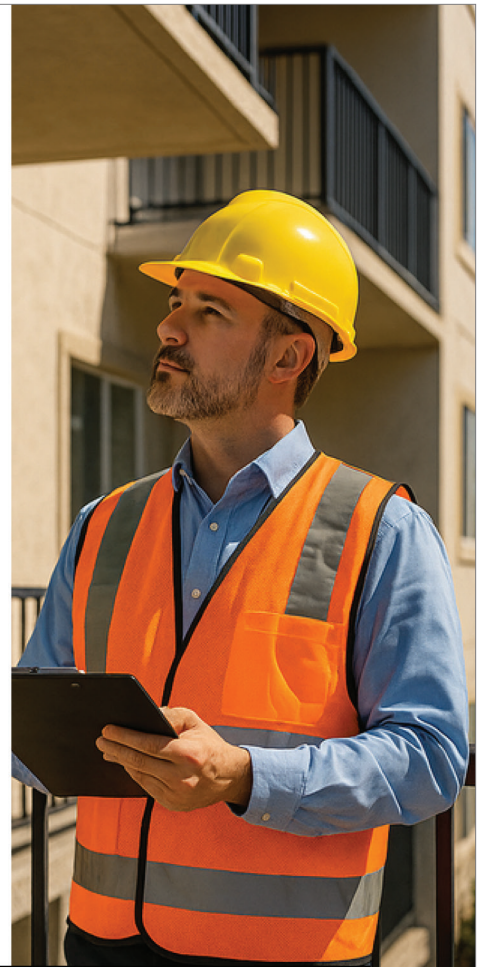
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