

COMMUNITY RESOURCE

INSIGHT & EDUCATION FOR COMMUNITY ASSOCIATIONS

NOVEMBER
2020

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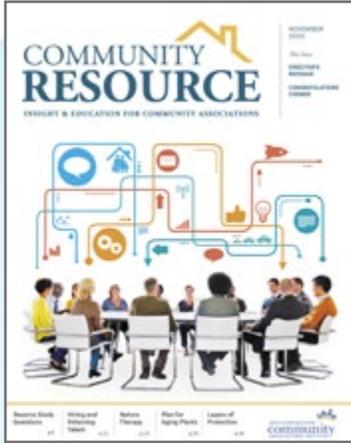
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CENTRAL & SOUTHERN AZ

November 2020



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2020 Year End Issue

Kayte Comes, MBA, MNML
Executive Director | CAI Arizona Chapter

The Central and Southern Arizona Chapters have exciting news for all its members, we have been approved by CAI Board of Trustees to be one chapter and will officially be CAI Arizona January 1, 2021. For those of you who did not see the Notice to Members email blast I am writing the notification in my address to you.

Members of CAI Central and Southern AZ, we are excited to announce that the CAI Board of Trustee has approved the request for the two chapters to unite and form CAI Arizona. Our official transformation will begin January 1, 2021.

For several years, members of CAI Central and Southern AZ have discussed combining resources to create one Arizona chapter. This year, as we watched our world change due to the COVID-19 pandemic, we have witnessed a surge in member participation and engagement with our state-wide virtual events. We believe that this trend will continue, and technology will make it possible to broaden our reach and deliver the best education and training programs for Arizona community association homeowner leaders, managers, and business partners serving these communities.

What does this mean for all of us now that we are one? The board of directors for the new CAI Arizona will be comprised of the current Central and Southern AZ board members. Following a member survey, we have determined that programming will remain the same for both regions. Beginning in January, CAI Arizona will be one brand, one organization— including marketing and advertising, website, social media, accounting, and finances. We are grateful for the enormous support and together we will make CAI Arizona a stronger and thriving chapter.

Both the Central and Southern Chapters' Board of Directors would like to thank its members for believing in the idea of CAI Arizona and helping to make it possible. Contact information for the Southern region will remain the same office number 520.870.7759, new website www.cai-az.org. Kayte Comes, Executive Director kayte@cai-az.org, Stephanie Stokes, Associate Executive Director stephanie@cai-az.org. If you are in the Central region the office number will remain the same 602.388.1159 and the fax number for both regions is 602.388.1153.

As I write this year end summary, we have seen an increase in COVID-19 related cases and the change in live events verses virtual programs. CAI Arizona is here for you and as we move forward, we will be in constant communication with membership regarding value, advocacy and programming needs of our membership and the needs of the state. It is our top priority that we provide the best education in the safest environment and at the same time try to have as much fun as possible in these unprecedented times.

From the CAI Office and the Board of Directors have a safe holiday season and we will see all of you in 2021.

All the Best!

Kayte Comes, MBA, MNML
Executive Director
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Reserve Studies: Commonly Asked Questions

By Stephanie Mueller, RS, PE

How much should we set aside in reserves?

There is no “one-size-fits-all” amount that should go into reserves. Each association is unique with different property components. Some associations have very limited common elements such as entry signage and sidewalks only, while others maintain streets, swimming pools, a clubhouse, playgrounds, tennis courts, and other amenities. The latter will certainly have much higher reserve assessments to pay for the wear and tear on all of those common elements.

Even with two identical properties built by the same developer, the homeowner boards might have very different philosophies about how to maintain them. One board might have an aggressive maintenance policy for regular seal coating, stucco paint applications, etc., while the identical property has no maintenance programs whatsoever. While the latter property might save money in the short term, they’ll end up spending a lot more money over the long term because many of their common elements will require replacement much sooner than if they had maintenance programs in place all along. Reserve funding is dependent upon the size and complexity of the common elements of the association and how well they are maintained by the board or management.



What items should be included in our reserve schedule?

Every reserve study begins with a review of the governing documents. These documents will identify the property components the association is responsible for maintaining. We see many schedules that omit major common elements with replacement costs greater than a threshold amount (anywhere from \$1,000 to \$10,000 depending on the specific community) such as plumbing, electrical systems, fire alarm/life safety systems, irrigation systems and storm water drainage and collection systems, to name a few. A qualified professional engineer can help an Association identify these specific items to help the Board avoid surprises.

When should we consider a special assessment or loan to fund capital projects?

Many Associations end up short on reserves due to a lack of long-term planning, unforeseen replacement projects, or a greater than anticipated scope and/or cost of a particular project. Without sufficient reserves, Boards are faced with two decisions; 1. Increase cash-flow to cover the cost of a particular project or, 2. Defer a replacement, which may result in higher costs or additional repairs.

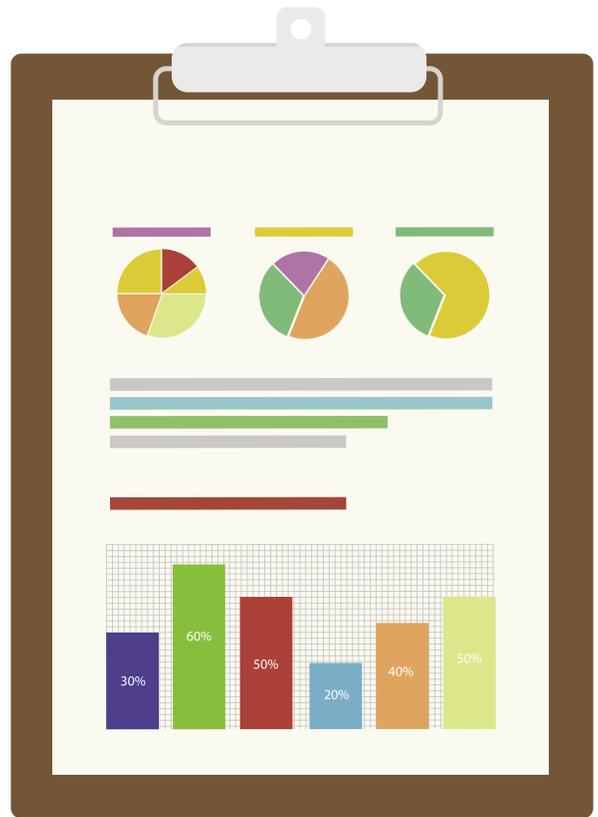
- **Special Assessment** – This option is the most burdensome to homeowners, boards and managers. This option usually puts significant financial pressure on residents.
- **Bank Loans** – This option provides an Association with immediate cash-flow to cover an expense. Homeowners are not asked for immediate contributions. However, this option has the added expense of loan interest associated with it.

When facing a structural or life-safety related expense, Associations with a shortfall in reserves may have to special assess and/or take out a bank loan.

How long does a reserve study generally take?

They can take anywhere from one to six months, depending on the provider, level of service and time of year. Best practices suggest starting the process early in the year to allow the Board plenty of time to review the study, ask questions of the provider and prepare for any upcoming projects later in the year. Many times, the reserve specialist may identify items that may be discretionary like clubhouse interior renovations or replacement of pool furniture. Many Boards like to explore alternate replacement or funding scenarios after reviewing a draft study. They can even break items into smaller or phased replacements less than the threshold amount which would allow them to be excluded from the study. We encourage getting a head start to review and explore these scenarios in an effort to tailor the study prior to budget season, usually in late summer for most Associations.

Stephanie Mueller, RS, PE is a Senior Engineer with Reserve Advisors, LLC and has completed more than 800 reserve studies since 2010. Stephanie also presents reserve study related education throughout the industry.



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Hiring and Retaining Talent for HOAs of Today's Arizona

By Darwin Albrecht, CMCA, AMS

Unique skills

The HOA industry requires a unique set of knowledge, skills, and abilities. It includes the practical working knowledge of the law, accounting, finance, and engineering. More importantly, carefully honed soft skills and emotional intelligence that many occupations do not require.

We work in a conflict intense job environment that offers challenges that most jobs do not encounter.

We must navigate the wide variety of personalities and expectations of several supervisors (board members) and the wants and needs of several thousand customers (homeowners). How many occupations require this level of hard and soft skills?



Increase Pay

I feel that it is essential that one learns not just from our industry but from other industries that tackle similar issues and challenges. One industry that is similar to ours is the government. One of the best models of efficient government is the city-state of Singapore. One of President Lee Kwon Yue's government model fundamental precepts was paying the employees a wage that is competitive with private industry so that the government could attract the best talent.

In most situations, I would argue that the HOA industry fails to keep pace with other industries.

I feel that many people have failed to recognize the changing environment in the Valley. We are competing with other industries that are offering higher wages and a more supportive work environment. There are a wide variety of career opportunities in a very diverse workspace in the area. The 2020 Robert Half salary survey reported that the Phoenix wages were 17% above the national average. Phoenix now has a higher-priced labor market than several other major metropolitan areas in the western U.S. (Dallas+11 %, Portland +11%, Austin +9%, Houston +8%, Las Vegas+2 %, Denver +11%) Phoenix is no longer a city dominated by low skilled

Continued

service workers where talented people will accept modest wages. Phoenix is a thriving, mature metropolis of nearly 5 million people.

This message is not directed just at managers, but also our valued maintenance and office support staff. This applies to our valued industry partners. Our business partners play a critical role in the success of our communities. They need to be fairly compensated so that we can attract the best people to our industry.

The clear message is that the HOA industry must recognize the need to offer competitive wages to attract people with the knowledge, skills, and abilities to thrive in a challenging environment.

Create a Supportive Environment to Retain and Recruit Talent

Companies can no longer take the passive approach of posting an advertisement on a job site and then waiting for the qualified talent to apply for the opening. You do not want to be in a situation where a talented person declines your job offer. You want to be in control of the job recruitment process.

Employers must create a supportive environment. Employees must have the tools to perform tasks. As my mentor used to say, “never send a man out to work with a dull knife.”

Technology must be reliable and efficient. Offices need to be clean and organized.

People with the necessary ethics and relevant job skills are in short supply. Good people are hard to find. A supportive environment must be provided to all employees.



Sell the value of professional HOA management.

Why are wages low? Mostly because we have not done a good job of selling the value proposition of professional HOA management. How many of your communities have increased their dues to support competitive wages?

Often people view HOA dues as a necessary evil and expense rather than a value-added service.

I have owned three homes, one with no HOA, one with a weak HOA, and another with a strong HOA, I know the difference. The people of the HOA industry need to believe in the value proposition of professional HOA management.

Our actions significantly impact the value of the largest financial asset that most people own, their home. We also have a significant impact on the lifestyle and enjoyment of their community.

When we appreciate our employees’ unique knowledge, skills, and abilities, we will offer the compensation necessary to attract and retain talented people. At that point, the HOA industry will graduate to a true profession and earn the respect that it deserves.

Darwin Albrecht, CMCA, AMS is the General Manager of Sunland Village, a best value age-privileged community in Mesa, Arizona.

An advertisement for AL's Plumbing LLC. On the left, the company logo "AL's PLUMBING LLC" is displayed in large blue letters, with contact information: "(480) 452-2828 | (623) 329-5170" and "www.alsplumbingllc.com". Below the logo is the text "ROC # 246437". In the center, a list of services is provided: WATER HEATERS, TANKLESS WATER HEATERS, SLAB LEAKS, ROOTER SERVICE, WATER MAINS/MAIN VALVES, RE-PIPING, TOILET REPAIR & INSTALLATION, WATER SOFTENER REPAIR & INSTALLATION, FAUCETS & FIXTURES, DRAIN CLEANING, SPRINKLER & DRIP LINES REPAIR & INSTALLATION, SEWER CAMERA, BATHROOM REMODEL & MUCH MORE!. On the right, a cartoon plumber character is shown running while holding a wrench and a bucket. To his right is a large white gift box with a red ribbon. Above the gift box, the text reads "CAI MEMBERS: GIVE US A CALL RECEIVE A FREE GIFT!".

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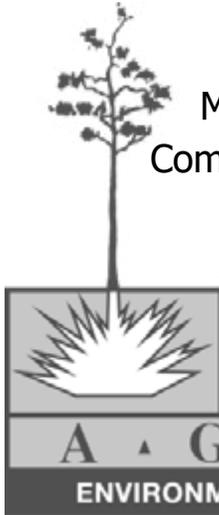
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Increase Resilience through Nature Therapy

By Bobbie Potts

For many people, COVID-19 pandemic can cause an entirely different level of stress. Now more than ever, people are turning to nature therapy to occupy themselves during difficult times. Here's how nature therapy can help increase resilience during these challenging times.

My Backyard and Nature Therapy

Some of my best childhood memories are spent outside with my sisters and cousins. We would play outside all day until my Mom would call for us to come in for dinner. Everything we could imagine was on this property. We had fields, gardens, and an orchard to play in. We would pretend and play games to our heart's content. One of my favorite games was Indiana Jones' type of adventure. We would use the plant fauna as our survival food and gather the most unusual colored rocks as our treasures. Sometimes, we would climb the orchard's apple trees and leaped from one branch to another, trying desperately to avoid the hot lava flowing below us. My childhood in nature created many unforgettable memories for me, but I did not realize how important this time was in my backyard. As a child, we don't think about nature's effects and how it can be highly restorative and therapeutic.

Nature Therapy

When we talk about nature, we often understand that we are present in and a part of nature. Yet, we still suffer as humans because we are so disconnected from the natural world.

Nature therapy (also known as Ecotherapy) is a growing field in treatment and is recommended by doctors as an essential prescription for mental health and physical wellness. Many people who struggle with psychological disorders such as PTSD, depression, and anxiety are prescribed walks, outdoor yoga, gardening, farming, and other nature activities to treat these disorders effectively.

Children and adults with Attention Deficit Hyperactivity Disorder (ADHD), obesity, or Type 2 Diabetes have detrimental long-term effects. As our world becomes "more connected" by spending more time indoors on television, smartphones, and videogames, children are sinking into increased sedentary lifestyles. Children's daily physical activities have been severely reduced over the last decade because parents and teachers are worried about safety concerns. They are scheduling children in more programmed indoor activities. Is it any wonder our children are stressed, depressed, and suffering from being overweight? I believe many of them are suffering from the nature deficit described by Dr. Qing Li.

Nature Therapy or Ecotherapy seems to be a perfect prescription for the nature deficit and helps our children with childhood problems. Time in nature as a family allows children to grow and relieve everyday stress.

Nature Benefits

One of the primary benefits of nature is that people who spend more time outdoors tend to be more active and involved in their community. Evidence suggests that people who interact with ecosystems and the environment live longer with a better quality of life. Children and adults who interact with nature tend to have higher self-esteem, better mood, knowledge, and continue to engage with nature and be more resilient to stress. In contrast, people who stay indoors and do not receive treatment such as nature therapy are more inactive or sedentary, disconnected from society, eat energy-dense and unhealthy foods, and have low resilience to stress.

Landscaping regularly brings me peace and helps destress my mind. A child playing outdoors where they can create imaginary play is essential for their healthy development. Spending time outdoors increases physical activity, generates positive energy, and enhanced signals that go directly to our brains. I understand the negative impacts stress can have on our lives. Understanding and implementing nature therapy gives me a chance to improve my health, and it gives me the same peace and excitement I felt when I was a child. I genuinely believe that it can do the same for everyone else.



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Plan Ahead for Aging Plants



By Rebecca Herro

As the landscapes in your Communities mature, they will require different care than they did when they were first installed. As your Community changes, make sure your budget strategies grow and change with your landscape; that way you'll be left with plenty of green — not only in your landscape but also in your Community's pocketbook.

Budgeting for Plant Replacement

One of the best ways to help keep your plant assets looking great well into the future is proper maintenance. Sustainable landscaping practices — including seasonal rejuvenation and avoiding shearing for shrubs, regular structural pruning for trees and proper irrigation techniques — can help keep your landscape healthy and looking fresh for decades after it was planted.

But, plants and trees are still living things, and they're not all going to live forever — no matter how well they're looked after. After years of looking great, plants can simply reach the end of their life spans and die off. Things like insects, disease, storms, frost and car accidents can also cause premature plant death.

That's why it's smart to budget each year for plant loss. While there's no set formula, a good rule of thumb is to set aside money to replace about 5-10% of your plant and tree inventory each year. This money should be earmarked strictly for plant replacement and not lumped into a general landscaping fund. That way, other items such as granite replenishment or irrigation repair won't deplete your plant replacement budget.

To determine exactly how much money to set aside each year, you need to take into consideration the type of plants in your Community and what their average replacement costs would be. A tree and plant inventory can be an especially useful resource during this process. If your Community doesn't already have one, it may be a good idea to create an inventory of each species including specific quantities. Then, work with your landscape maintenance contractor to help determine the estimated replacement costs (including installation) for each of the species that make up your landscape.

Another thing to keep in mind is the age of your replacement plants. Purchasing younger trees will be less expensive than older, more mature trees. If your Community would like to save money, younger trees may be a good option. Or does your Community prefer that more mature plants be used? Make sure to consider the overall look your Community desires when budgeting for replacement costs.

Managing a Mature Arbor Asset

As your tree asset grows, so will the amount of money it will require to properly maintain it. A tree that is 20-30 years old will have a considerably larger canopy than a 10-year-old tree, and may cost nearly double for routine maintenance — such as canopy thinning and structural pruning.

When planning for these costs, however, knowing your specific tree species characteristics is crucial. A Sissoo can grow to be 60 or 70 in just 15 years and will cost quite a bit to prune, while a Southern Live Oak may never grow more than 30 feet tall and will cost significantly less for routine pruning. Again, a tree inventory will be an invaluable source for your Community when it comes to determining a long-term tree pruning budget.

Another added expense that comes with older trees is moving their drip irrigation lines out as their root zones grow. This should be done every 5-10 years to help make sure that trees are getting proper irrigation.

Work with your arbor management company to assess your Community's trees and create a plan for what work they will need in the next 5, 10 or even 15 years. That way, your Community can begin budgeting or planning for these added expenses now.

Nothing lasts forever. This is especially true in our Community landscapes. When it comes to keeping your landscaping looking great and functioning well for years to come, simply looking ahead, anticipating changing needs and creating a plan can go a long way.

Layers of Protection: Developing Community Association Security



As homeowners volunteer to be a part of their community associations, their range of knowledge on a variety of topics must immediately grow. Those tasked with security for their association are well aware of one very important thing...they want a safe and secure community. But how to go about establishing that can be a challenge. If it is a new community, the association members will draw on past, and hopefully positive, experiences. With an existing community, new members may prefer to stick with whatever the standard was in the past.

Many residential communities will benefit from creating layers of protection – both in terms of the personnel and physical security elements. Layers of security can be developed regardless of the size of the community. Some of these layers may already exist (exterior fencing for example) but once they are officially regarded as part of the security program, their maintenance and importance will be given greater priority. For example, if a homeowner sees a damaged fence on remote part of the property, they may not see a need to report it. If it is clearly communicated, however, that the fence is an important layer of security, the homeowner would be much more likely to report the problem.

Exterior Layer

The outermost layer of security can encompass a number of items including exterior fencing, landscape items preventing entry such as large boulders, No Trespassing signs, lighting, gates, intrusion detection sensors and security officers who patrol the perimeter of the community. Crime prevention through environment design can be an important part of the exterior layer of security.

Middle Layer

The middle layer can include a manned gatehouse or reception area, locked main doors, elevator controls, access control systems, delivery/package reception and logs, CCTV, and visitor identification systems. The middle layer of security should also consider non-residential items such as storage closets and maintenance sheds. Not only could theft be a possibility here, but these areas could also create shelter for intruders and therefore should be locked and monitored. Utility or electrical closets, server rooms and stations for water, gas and sewage service should also be locked and access controlled. The middle layer of security offers protection closer to the interior of the community – the residences.

Interior Layer

This is the most critical layer. This is the final step between the residents and potential dangers. Residence doors and locks, access controls for primary parking areas, security officer patrols, motion activated lights and emergency procedures all play a role in interior security. This includes anything involving entrance or access to residences.

Through both patrols and specified posts, security officers can be an active part of each of these layers, often tying all of the pieces together.

In addition to the physical and personnel layers of security, intangible elements also play a role in the overall plan for safety and security. Communication and homeowner involvement is key. Homeowners and community association leaders should work together with their security

company to proactively prevent crime. Simple actions can play a large part in creating a safer community. High quality security officers are already aware of the importance of knowing their residents. Homeowners should also get to know the security officers. This helps further the security relationship and open lines of communication. Homeowners should not hesitate to report suspicious or unusual activity to the security staff. Involving homeowners who are not part on the association board through events or newsletters and calls for volunteers will also be fruitful. Security is the responsibility of the entire community.

Relationships with local authorities are yet another layer. The local police and fire departments, along with your security provider, can help you produce security and safety awareness programs for residents. Inviting the police into your community, communicating with them about any security and emergency plans developed, and becoming involved in their safety initiatives extend the layers of security already in place.

Also, don't hesitate to review and assess security plans periodically. What looked good on paper, or what worked for a nearby community, may not work as you expected. Security reviews will give you the opportunity to record any changes that were made once the program was put in place.

The security options for residential communities are many and the ideal security program is one that offers many layers of protection and ultimately, meets your community's unique needs.

This article was provided by the residential security experts at Allied Universal Security Services. Allied Universal secures over 1790 residential communities nationwide.



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