

2022 Member Directory

**CREATING
Connections
Being Our Best...
TOGETHER**

SOUTHERN COLORADO
CHAPTER

community
ASSOCIATIONS INSTITUTE



2022 CHAPTER EVENTS CALENDAR

JAN	11 Education Luncheon: January Jumpstart	JUL	22 Annual Golf Tournament
FEB	08 Education Luncheon 09-12 National Law Seminar	AUG	09 Law Day
MAR	08 Education Luncheon 16 New Member Breakfast	SEP	12 CLACsic Golf Tournament 13 Annual Meeting/ Education Luncheon 23 Annual TopGolf Tournament
APR	07 Speed Networking 12 Education Luncheon 16 Board Leadership Development Workshop (Virtual) 22 Annual Bowling Tournament	OCT	06 Business Partner Sponsored Happy Hour 11 Education Luncheon 12-15 National CEO-MC Retreat 15 Board Leadership Development Workshop 19 New Member Breakfast
MAY	04-07 National Annual Conference 10 Education Luncheon 11 CLAC Trivia Event	NOV	08 Education Luncheon
JUN	10 Flying W Ranch Event 14 Education Luncheon (Onsite at community)	DEC	13 Year-End Celebration, Awards, Board Installation & Charity Donation Event

2022 MEMBERSHIP DIRECTORY

Southern Colorado Chapter

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Mission Statement

The mission of the Southern Colorado Chapter of CAI is to provide necessary resources to members of community associations, their management, and expert service providers to the advancement of the homeowners' association industry.

2022 Chapter Theme

Creating Connections, Being Our Best...Together

Vision Statement

To support and enable member success to the advancement of the homeowners' association industry - CAI Southern Colorado Chapter is recognized as the primary source of education pertaining to homeowner's association memberships, management, and expert service providers.

CAI Southern Colorado
P.O. Box 63831 | Colorado Springs, CO 80962
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USE OF THE MEMBERSHIP DIRECTORY

This Directory was developed to serve the membership of the Southern Colorado Chapter of CAI. **The directory is provided as a member service and is not intended for solicitation purposes.** Except for the purpose of facilitating or conducting CAI business, this directory may not be reproduced by any means, added to any database, or converted to any other format without the express written consent of the CAI Southern Colorado Chapter Executive Director or Board of Directors.

The Membership Directory is produced and distributed annually. One directory is provided to each primary Business Partner member, each Management Company member, each Individual Manager member, and each primary Homeowner Leader member. While there is no cost for the initial directory provided, additional directories may be requested and purchased from the Chapter at a cost of \$10.00 each. As long as your membership remains active with CAI Southern Colorado, you will receive a Membership Directory each year.

ADVERTISING: Advertising in the Membership Directory does not constitute an endorsement by the Chapter.

CORRECTIONS: Diligent attempts have been made to ensure that all current members are included in the directory and that all information is current and correct.

Please contact the Chapter office with any corrections or changes to your individual listing. If you are a member and you do not see your listing, please remember that the directory is current as of February 1, 2022. If your membership was not active until after that date, you will not be listed until the next year's directory. Managers, management companies, and business partners will be listed in our online member services directory at www.caisoco.org.

Names and addresses of our members may change. If the contact name, address or phone number changes for you, your Homeowner Leaders or your firm, please notify the National office via email at addresschanges@caionline.org.

The information contained in this directory is not warranted for accuracy or completeness. The statements and opinions expressed herein are entirely those of the contributing authors and in no way imply endorsement of any product, service, or opinion of the Southern Colorado Chapter.

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MESSAGE FROM THE PRESIDENT

These last couple of years sure have strengthened our ability to “roll with the punches”, haven’t they? Although we have each faced varying challenges in both our personal and professional lives over the course of the past two years, we have emerged stronger and more adaptive than ever!

Our focus this year, ***Creating Connections, Being Our Best...Together***, emphasizes that we are stronger and wiser as a team. Each bringing our own experience and perspective to the table as partners and friends in this amazing Chapter, we provide support and strength to each other at unprecedented levels.

A resource for repairs, a friend to brainstorm with, a voice of confirmation that you are on the right track, even a shoulder to cry on; our members have naturally supported each other through these trying times. As 2022 rolls on, we look forward...

- to hosting a full range of in-person events;
- to bringing our membership together to strengthen these bonds; and
- that, as a TEAM, we will continue making Southern Colorado a better place, one home at a time!

Thank you for continually supporting your fellow CAI-SOCO members. Please join me and the Board of Directors as we all look forward together!

Sincerely,
Heather Smith
President, CAI Southern Colorado



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The Southern Colorado Chapter values the many volunteers who serve on our committees. Your participation assists with the continued growth and successful operation of our Chapter and in furthering and meeting the needs of our membership.

We sincerely thank you for the time you take out of your busy schedules and lives so that CAI SOCO can be the best it can be!!

If you are interested in serving on a committee, please contact the Chapter office or Chair of the committee you are interested in joining.

TO ALL OUR VOLUNTEERS - YOU ARE TRULY APPRECIATED!

2022 CAI SOUTHERN COLORADO SPONSORS

The Southern Colorado Chapter of Community Associations Institute would like to express sincere gratitude to our 2022 Annual Sponsors, whose support allows for the continued successful operation of our Chapter.

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ABOUT COMMUNITY ASSOCIATIONS INSTITUTE

What is Community Associations Institute?

Community Associations Institute (CAI) is a national, volunteer-driven, non-profit organization formed in 1973 to provide the education and resources to people who live in and work with community associations (townhomes, condominiums, cooperatives, and master planned communities).

What is CAI's Purpose?

- To be the nation's voice on community association issues.
- To be the catalyst for developing and presenting educational opportunities that advance the industry and foster competence in industry professionals.
- To be the leading promoter of research in the community association field.
- To be the premier resource center on current and future trends and practices.
- To provide professional services and products for community associations including books, guides, Common Ground magazine, and newsletters for community association volunteers and association managers.
- To serve as the "recognized resource" for information about community associations and the community association industry.
- To educate and train community association leaders and those who serve community associations and the public at large about the benefits of community association living.
- To promote effective public policies on the national, state, and local levels.
- To advocate community association interests before legislatures, regulatory bodies, and the courts.
- To create partnerships with allied organizations.
- To provide a networking and referral opportunity through both the national office and local CAI chapters.



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Let's get started.

April Ahrendsen, Vice President

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Who Should Belong to Community Associations Institute?

Membership in the Institute is open to anyone involved with community associations, condominiums, cooperatives, and master planned communities. Members include:

- **Homeowner Leaders:** CAI offers conferences, monthly newsletters, publications, workshops, technical assistance, and local educational programs to build a homeowner leader's (homeowners and Board members) knowledge and skills pertaining to their leadership role within their communities.
- **Managers and Management Companies:** CAI offers the only professional designation, career track and education program for association managers as well as publications and conferences that enhance a manager's leadership skills.
- **Lenders, Insurance and Real Estate Agents:** CAI offers access to a wealth of information and the opportunity to "meet the market" on a local, regional, and national level.
- **Attorneys:** CAI offers seminars, workshops and the Law Reporter, a monthly publication summarizing major legislation and analyzing important court cases affecting association living and management.
- **Public Officials:** CAI offers current information on all aspects of planning, regulating and assisting community associations.
- **Accountants:** CAI offers workshops and conference programs on all aspects of association financial management.
- **Service Providers:** CAI helps educate the potential customers of its associate members on how to find, bid and evaluate their needs.

CAI does not represent any one professional or interest group. CAI represents the process of creating and operating a successful, viable community association.

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CAI SOCO MEMBERSHIP BENEFITS

- Chapter Programs, seminars, workshops and meetings let you share ideas and information that affect you locally
- Exchange of solution-finding ideas through a network of people you know and will get to know
- Social and legislative activities by involved members and chapters to meet situations vital to the entire membership
- National Conferences where you can meet, learn and exchange ideas with community association leaders from across the country and our specific region
- Common Ground our national magazine, covers vital information on community association issues and operations, provides insight on what other associations are doing, and presents a national forum for developing the direction of community associations
- Annual Law Seminars provide a concentrated series of presentations for managers, board members and professionals concerned with community association law
- Legislative updates provide all-important news regarding the actions being considered and taken by the Legislature
- A Network of National Members who may be able to provide guidance for your unique situation
- National exposure through exhibitions at CAI functions, and advertising at conferences and programs
- Local chapter newsletter, "Community Connections", provides articles to educate members on community association related issues, as well as Chapter-specific events and member information
- Access to "members only" portals on both the local and National websites providing exclusive content and membership information

Membership and Additional Information

For membership or other information, please call the Southern Colorado Chapter Office at (719) 432-9960 or visit our website at: www.caisoco.org. You can also contact the National office at (888) 224-4321 or visit their website at www.caionline.org. Programs and events are listed on the individual respective websites.

BOARD LEADERSHIP DEVELOPMENT WORKSHOP

Education for homeowner leaders just got better.

The **Board Leadership Development Workshop** teaches you how to communicate with association residents, hire qualified managers and service providers, develop enforceable rules, interpret governing documents and more.

It provides a comprehensive look at the roles and responsibilities of community association leaders and conveys information to help create and maintain the kind of community people want to call home. The workshop is available in two formats: live classroom instruction through CAI chapters or an online recorded course.

Whether you live in a condominium, homeowners' association (HOA) or other type of community, the Board Leadership Development Workshop highlights what every board member needs to know to serve effectively. The workshop consists of five modules:

- **Module 1: Governing Documents and Roles & Responsibilities.** To start you on the right path, Module 1 helps you understand the legal authority for your association. It also clarifies the duties and responsibilities of each board member and the professionals who are available to assist the board.
- **Module 2: Communications, Meetings and Volunteerism.** Module 2 helps you learn how to maximize volunteer involvement in your community association by improving board communications, conducting effective meetings, and building community spirit.
- **Module 3: Fundamentals of Financial Management.** Module 3 introduces the fundamentals of association financial management, including guidelines for protecting your association's assets, preparing a budget, planning for the future, and collecting assessments.
- **Module 4: Professional Advisors and Service Providers.** Because putting together the right team to support your association can be challenging, Module 4 provides practical tips on finding, evaluating, and hiring qualified professional advisors and service providers.
- **Module 5: Association Rules and Conflict Resolution.** Module 5 explores guidelines for making reasonable association rules, enforcing rules fairly and resolving conflict effectively.

If you are interested in attending one of CAI's local homeowner education programs, contact the Southern Colorado Chapter office.

COMMUNITY ASSOCIATIONS INSTITUTE DESIGNATIONS FINDING THE RIGHT PROFESSIONAL FOR YOUR COMMUNITY

Why should you hire certified professionals?

A community association operates as a government, a community, and a business... making it a truly specialized type of organization. Leading America's 250,000 community associations are more than one million community association volunteer leaders who dedicate their free time to serve on their Board of Directors and additional committees.

As a board member, trustee, or homeowner leader working with your community association, you have fiduciary responsibilities which compel you to make decisions that can have profound financial and social impact on you and your neighbors. Receiving professional and accurate advice or guidance on issues such as reserves, maintenance, insurance, budgets, governance, contracts, the law, and rules can make the difference between prosperity and distress.

Many experts who work in these fields must earn degrees and pass tests to be certified. So why would a board hire professionals who may not be qualified to look after their homes and their community?

What to look for...

To help ensure that you have the expert guidance you need to manage your community's assets most effectively, look for professionals with the designations and certifications described below.

Community Associations Institute's (CAI) designations help ensure that managers have the knowledge, experience, and integrity to provide the best possible service to your association. If your manager holds a CAI designation, he or she has made a substantial commitment and investment in their education and career, and your community's welfare.

Certified Manager of Community Associations® (CMCA®)

The only international certification program designed exclusively for condominium, cooperative, and homeowner association managers, the CMCA® program provides standards for association management, and gives homeowners and boards confidence in their manager's knowledge and ability to provide professional service.



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The CMCA® certification is administered by CAI's affiliate organization, **Community Association Managers International Certification Board (CAM-ICB)** [formerly NBC-CAM]. The CMCA® is the first level of a manager's professional education process. It recognizes individuals who have demonstrated the fundamental knowledge needed to manage community associations. To obtain this certification, managers must complete the M-100 course (The Essentials of Community Association Management), pass the National Certification Examination, adhere to standards of professional conduct, and continue their education with required additional course work in order to meet the redesignation requirements every two years.

Association Management Specialists® (AMS®)

The AMS® designation is the second tier in CAI's career track and is awarded to managers who complete the M-100 course (The Essentials of Community Association Management), pass the National Certification Examination to earn their CMCA®, complete and pass two M200 series classes and exams, adhere to standards of professional conduct, and continue their education with required additional course work in order to meet the redesignation requirements every two years.

Professional Community Association Manager® (PCAM®)

The PCAM® designation is the pinnacle of CAI's professional manager designation program. It is the highest professional recognition available nationwide to managers who specialize in community association management. The PCAM® manager displays a significant commitment to the industry and through extensive education requirements, has gained an understanding of all aspects of community association management. By earning the PCAM®, a manager joins the elite...the select...the best. To earn the PCAM® designation, a manager must have five years of community association management experience, complete and pass all six of the PMDP M-200 series classes and exams, complete an extensive Case Study, have earned and maintained CMCA® certification, comply with CAI's Professional Code of Ethics, and continue with additional continuing educational courses in order to meet the requirements every three years to maintain the designation.



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Large-Scale Manager® (LSM®)

The LSM® designation was designed to allow PCAM® managers to specialize within their profession. The LSM® designation recognizes the unique requirements of managing the operations of a large-scale community, which is defined as a single, contiguous community association with a full-time on-site manager, a minimum of 1,200 units, a minimum of 1,000 acres, and a minimum annual operating budget of \$1.5 million. The LSM® manager must have an active PCAM® designation, currently manage a Large-Scale Community or have five years of Large-Scale Community Management experience or city management experience within the last ten years, have ten years of community management experience, pass the Large-Scale PMDP M-300 series and M-400 series classes, attend CAI’s Large-Scale Managers Workshop, complete the CMAA coursework, attend a CAI National Conference, author industry publications and be a PMDP Course Instructor. A Large-Scale Manager must also continue with additional continuing education courses in order to meet the redesignation requirements every three years.

Accredited Association Management Company® (AAMC®)

The AAMC® accreditation is awarded to a management company that specializes in community association management and that is committed to providing unique and diverse services to their clients. A company that holds the AAMC® designation ensures their staff has the skills, experience, and integrity to help your community succeed. The AAMC® designation is earned when at least 50% of the company’s managers hold CAI designations or certifications, the senior manager has obtained the PCAM designation, and the company has a minimum of three years’ experience providing community association management services. The AAMC® company commits to upholding the highest ethical standards and is required to meet CAI’s financial management and reporting standards.

Reserve Specialist® (RS®)

The RS® designation is awarded to experienced, qualified reserve specialists who, through years of specialized experience, can help ensure that your community association prepares its reserve budget as accurately as possible. RS® designees must meet comprehensive requirements including the preparation of at least 30 reserve studies, hold a bachelor's degree in construction management, architecture, or engineering, or equitable work and/or trade school experience, and comply with strict rules of conduct outlined by the Professional Reserve Specialist Code of Ethics. A Reserve Specialist® will help ensure your association is planning for future needs to reduce the chances of levying special assessments to pay for unexpected expenses. A Reserve Specialist® must apply for redesignation every three years and a list of at least 15 clients serviced in a three-year time period and commit to upholding the highest ethical standards outlined by the RS® Code of Ethics.

Community Insurance & Risk Management Specialist™ (CIRMS™)

The CIRMS™ designation recognizes a demonstrated high level of competency within the risk management profession to those having five years' experience in the community association insurance field and having a strong legal and ethical standing in the industry. CIRMS™ designees have certified responsibility for at least 25 association insurance programs within the past three calendar years and have demonstrated significant involvement in the provision of insurance and risk management services to community associations. Such services could include consulting reviews, loss control inspections, program analysis and recommendations, and others.

College of Community Association Lawyers® (CCAL®)

The College of Community Association Lawyers was established by CAI in 1993. The purpose of the College is to acknowledge CAI member attorneys who have distinguished themselves through contributions to the evolution or practice of community association law and who have committed themselves to high standards of professional and ethical conduct in the practice of community association law. Only attorneys with ten or more years' experience in community association management law, and who meet select criteria, including writing and speaking on association law issues, can be inducted into the College.

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