

CENTRAL OREGON REGIONAL
CHAPTER



Community


ASSOCIATIONS INSTITUTE

2023 Member Directory



Building Better Communities

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www.caicentraloregon.org

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2023 MEMBERSHIP DIRECTORY

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Bend, Oregon 97708

Web: www.caicentraloregon.org

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Mission Statement

The mission of the Central Oregon Regional Chapter of Community Associations institute is to provide necessary resources to members of community associations, their management, and expert service providers to the advancement of the homeowners association industry.

"BUILDING BETTER COMMUNITIES"

Vision Statement

To support and enable member success to the advancement of the homeowners association industry - Central Oregon Regional Chapter of CAI is recognized as the primary source of education pertaining to homeowners association memberships, management, and expert service providers.

USE OF THE MEMBERSHIP DIRECTORY

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

The Membership Directory is produced and distributed annually. Directories are available at all in person events and electronically on CORC's website. Directories may be requested and purchased from the Chapter at a cost of \$10.00 each. As long as your membership remains active with Central Oregon Regional Chapter of CAI, you may receive a Membership Directory each year.

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

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 9th, 2023. If your membership was not active until after that date, you will not be listed until the next year's directory. Names and addresses of our members can change. If the contact name, address or phone number changes for your volunteer leaders or firm, please notify the National office: 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 by the Central Oregon Regional Chapter of CAI.

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CORC CAI
EVENTS
2023

JAN
19

KICK OFF - ASK AN ATTORNEY

MAR
9

SHORT TERM RENTALS & MANAGING
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APR
29

BOARD LEADER CERTIFICATE COURSE

JUN
8

EMERGENCY PREPAREDNESS
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24

CONFLICT RESOLUTIONS TECHNIQUES
FOR DIFFUSING SITUATIONS

SEP
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CORC FULL THROTTLE -
GO KART RACING

OCT
19

HOA HORROR STORIES

DEC
7

BINGO
~ ANNUAL MEMBERS MEETING

LUNCH BREAK ROUNDTABLES

Feb 15th, May 10th, Aug 16th, Nov 15th

FOR MORE INFORMATION:

WWW.CAICENTRALOREGON.ORG

CENTRAL OREGON REGIONAL
CHAPTER


community
ASSOCIATIONS INSTITUTE

MESSAGE FROM THE PRESIDENT

As we embark on another year, I am excited to see the continued growth of our Central Oregon Regional Chapter. Our board, executive director, and committees have worked diligently to provide informative educational events, fun and enthusiastic social events, and continued growth of our membership for 2022. It is through the hard work of these individuals, and the support of our business partners, that we were able to grow our chapter almost 20% last year.

With the support of the members and individuals in this directory, I hope that we can continue this growth for 2023! To be able to assist and accomplish this continued growth, we have added some "new events" for 2023. Manager members will be excited for the manager only lunchtime roundtables as we have envisioned these as an outlet for collaboration, support, and camaraderie within the managers of CORC. To bring some extra enthusiasm to our Chapter, provide to our local community, and bring our business partners and members in on another level, we will be hosting a unique food drive for 2023. I'm not sure I can release the details yet, but I am excited to see how we will do as a chapter. One million (said with my pinky to my mouth) pounds of food donated? Is that a reasonable goal?

I'd like to personally say thank you to Heather Brownson, our Chapter executive director, for all the things she does for us. Without her, I'm certain we wouldn't be able to hold these events! Next time you see her, please give her a shout of thanks, literally!!

If you have any questions regarding CORC, please contact Heather at corc@caicentraloregon.org.

Also, please watch your emails as announcements are made for all these exciting upcoming events!

I look forward to a fun and exciting year and hope to see you at the next event!

Here's to a great year,
William (Bill) Anderson, CMCA®
2023 CAI Central Oregon Regional Chapter- President

2023 BOARD OF DIRECTORS

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wanderson@aperionmgmt.com

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Director

Rod Collins
Wagon Trail Ranch Homeowners Association
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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 and 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

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.

COMMUNITY ASSOCIATIONS INSTITUTE

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
- Magazines: Common Ground 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
- Websites are provided by National and the Central Oregon Chapter, where-in information and legislative updates, programs and events are listed. The National website has a “members only” section which provides additional information to members within the specific membership categories.

Membership and Additional Information

For membership or other information, please contact the Central Oregon Chapter Office at on our website at: caicentraloregon.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

CAI's Homeowner Education Programs - Maximize the benefits of volunteer leader membership by better understanding the history, purpose, and function of community associations.

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 and an online 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 Chapter office.

Other Education Opportunities

CAI also offers many other learning opportunities for homeowner leaders including webinars and national conferences and events.

COMMUNITY ASSOCIATIONS INSTITUTE DESIGNATIONS

FINDING THE RIGHT PROFESSIONAL FOR YOUR COMMUNITY

Why you should 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 national 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.

The CMCA® certification is administered by CAI's affiliate organization, Community Association Managers International Certification Board (CAMICB) [formerly NBC-CAM]. The CMCA® is the first level in 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 re-designation 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, 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 re-designation requirements every two years.

Professional Community Association Manager® (PCAM®)

The PCAM® designation is the pinnacle of CAI's professional manager designations 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 designation and CMCA® certification, comply with CAI's Professional Code of Ethics, and continue with additional continuing educational courses in order to meet the re-designation requirements every three years to maintain the designation.

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 1200 units, a minimum of 1000 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 re-designation 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 thirty reserve studies, hold a bachelor's degree in construction management, architecture, or engineering, or 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 re-designation every three years showing a continuing amount of work of 30 reserve studies in a three year time period and commits 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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541-548-4049
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Pacific Western Bank

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joseph.harrison@brightview.com

Springtime Landscape & Irrigation, Inc.

Bill Schumacher
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Join CORC CAI

- Networking opportunities with like minded individuals looking to strengthen our communities through our work
- Educational opportunities to be informed on trends in our community.
- Better reach to your customers through newsletters, websites, membership directory and event sponsorship opportunities.
- Affiliate advertising opportunities with CORC logo on business website.

caicentraloregon.org/membership.html



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VP, Senior
Community Association
Relationship Officer

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AppFolio, Inc.

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Webfoot Painting Co.

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