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2026: ISSUE THREE • THE PUBLICATION OF CAI-GREATER INLAND EMPIRE



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PRESIDENT'S MESSAGE



LANA HAMADEJ, PCAM
THE AVALON MANAGEMENT GROUP, INC., AAMC

Happy Summer, CAI-GRIE!

I hope you are all enjoying a wonderful summer and finding time to recharge while staying connected with our incredible CAI-GRIE community.

This past quarter has been filled with accomplishments worth celebrating. We recently returned from the CAI Annual Conference in Hollywood, Florida, where our chapter was once again recognized on the national stage. CAI-GRIE received the **CAI Excellence Award** for a large chapter, recognizing outstanding achievement in **Chapter Operations & Sustainability, Public Affairs, Leadership, and Member Engagement**.

This prestigious honor reflects the dedication, passion, and countless volunteer hours contributed by our board members, committee chairs, committee members, and chapter volunteers. Their commitment to serving our members and advancing our industry continues to make CAI-GRIE one of the premier chapters in the country. Congratulations and thank you to everyone who played a role in earning this recognition.

We've also enjoyed an outstanding season of events and education. Our Annual Golf Tournament was another tremendous success, bringing together members for a day of networking, friendly competition, and camaraderie. *Boots, Buckles & Country Nights* was a fantastic evening that introduced new participants to our popular Chili Cook-Off and created lasting memories for everyone in attendance. In addition, our educational programs continue to deliver exceptional value, with attendance steadily growing as members take advantage of the opportunities to learn from industry experts.

While we've accomplished a great deal, there's still plenty ahead. I encourage each of you to participate in one or more of the exciting events and educational programs planned for the remainder of the year. Your involvement is what makes our chapter thrive.

At the beginning of 2026, your CAI-GRIE Board established a series of measurable goals designed to strengthen our chapter and enhance the value we provide to our members. I'm pleased to share that we are making meaningful progress in every area.

Our focus includes:

- Growing our membership to 800 members while maintaining a 92% retention rate.
- Achieving a 10% net profit margin through responsible financial stewardship.
- Delivering 10 high-quality educational programs while celebrating new members and professional designation recipients.
- Expanding leadership opportunities through our Future Leaders Program and recognizing professional achievements throughout the year.
- Increasing support for CLAC, strengthening grassroots advocacy efforts, and enhancing our chapter's visibility through expanded outreach and social media engagement.

These goals represent far more than numbers. They reflect our commitment to serving our members, strengthening our profession, and ensuring that CAI-GRIE continues to be a leader within the CAI community.

Thank you for your continued involvement, your volunteer spirit, and your dedication to our chapter. Together, we are building an even stronger organization and truly **Leading with Purpose**.

I look forward to seeing you at an upcoming event!



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DIRECTOR'S MESSAGE



ERICA TENNEY, CMCA, AMS
CAI-GREATER INLAND EMPIRE CHAPTER

Celebrating Growth, Looking Ahead

It is hard to believe we are already more than halfway through the year! I continue to be encouraged and inspired by the participation and enthusiasm of our members, and the growth we have seen through so many new faces joining our Chapter has been incredible. I am incredibly proud of everything we continue to accomplish together. Your involvement, support, and willingness to show up are what make this Chapter so special and what allows me to truly enjoy what I do, continue mixing things up, and find creative new ways to bring our members together.

As we head into the final months of 2026, there is still so much to look forward to! I hope to see everyone at our Annual Meeting on September 9 as we welcome our newly elected 2027 Board Members, and again in November as we celebrate the incredible people who make our Chapter

shine at the TOPS Awards and Monte Carlo Night. I am looking forward to reading all of your thoughtful award nominations and recognizing those who go above and beyond. Keep doing what you do, continue lifting up those around you, and remember, we are Stronger Together, Leading with Purpose!

Erica Tenney, CMCA, AMS
Executive Director
CAI-Greater Inland Empire Chapter

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The CAI-Greater Inland Empire (GRIE) Chapter hosts educational, business and social events that provide the Chapter's Business Partners various opportunities to promote their companies' products and services to Community Association owners and managers serving the Community Association Industry. It is expected that all participants in Chapter events – whether they be educational, business or social – will conduct themselves in a professional manner representative of their business or service organization so as not to detract from the experience of others seeking to benefit from their membership in the Chapter. **For more information, visit cai-grie.org**

THE INSIGHT CORNER

VOICES FROM THE CHAPTER

Budget Season: Putting Action to Plan



BY MATTHEW HOLLAND, CPA, FOX AND STEPHENS, CPA

Before finalizing next year's budget, Associations should ask a few key questions:

Are assessments keeping pace with rising costs such as insurance, utilities, landscaping, and repairs?

Inflation continues to impact nearly every Association expense, so relying on last year's numbers may leave your budget falling short.

Is the reserve study current, or are future repair and replacement costs based on outdated information?

Were reserve funds used to cover operating expenses, and if so, has that activity been tracked and discussed by the Board?

If your Association requires a review or audit, have you begun obtaining CPA proposals? Starting the process at least three months before the end of your fiscal year gives your Board enough time to obtain proposals, select a CPA, and schedule the engagement.

Once your financial information is complete, send it to your CPA as soon as possible. Early submission helps reduce requests for additional information and keeps the review or audit process moving efficiently.



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EDITOR'S LINK



SEAN ERIK ANDERSEN, PRA, RS

As we settle into the third quarter of 2026, I remain grateful for the energy and camaraderie that continue to define our Chapter. Summer has brought no shortage of momentum to CAI-GRIE, and it is a privilege to share that story in each issue of *Connect*.

This issue centers on sound financial planning. Danielle Lampreda, CMCA, AMS, PCAM of Equity Management Company and I make the case in *"Working Together to Create a Great Budget"* that the budget and Reserve Study are two halves of the same plan. Matthew Holland, CPA of Fox and Stephens builds on that theme in *"Budget Season: Putting Action to Plan,"* and Kate Bennet of PaveMasters rounds it out with *"Paving Fundamentals,"* a primer on matching the right pavement repair to the right condition to protect a community's reserves.

Legislative advocacy also remains front and center. Amy K. Tinetti, Esq. offers our 2026 Second Quarter CAI-CLAC Legislative Update, and Cooper R. McHatton, Esq. of Beaumont Tashjian follows with *"SB 1007*

Defeated: What Boards Should Know and Do Next." Together they are a powerful reminder that advocacy works, but only when we participate.

We are also honored to share Sarah Karlovic's moving account of the E-Bike and E-Motorcycle Safety Event she organized for her community, a story that reminds us community management, at its heart, is about people.

Our events continued to shine this quarter, from the May Luncheon's Advocacy Activated at The Hall at Ingalls and June's Paws, People and Policy: FHA Compliance at the DoubleTree, to Boots, Buckles & Country Nights, complete with our Chili Cook-Off and a first-ever mechanical bull and a fun evening of Bowling at Temecula Lanes.

My thanks, as always, to the Publications Committee for the care they pour into every issue. Here's to a productive third quarter as we continue leading with purpose!



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MAY EDUCATIONAL LUNCHEON: ADVOCACY ACTIVATED

May 13, 2026

The May Educational Luncheon was held on May 13 at The Hall at Ingalls Event Center, bringing community managers together for an afternoon of networking and education. Before the program began, attendees had the opportunity to connect with several industry partners. Thanks to the efforts of the Legislative Support Committee, two representatives from local elected officials' offices also attended the event.

The presentation, "Advocacy Activated," featured Sarah Karlovic, CMCA, along with attorneys Dirk Petchul and Michael Kennedy. Each speaker participated in CLAC's Advocacy Days at the Capitol and shared firsthand experiences meeting with legislators and discussing issues affecting California's community associations. They also highlighted several HOA-related bills currently moving through the Legislature and explained how those proposals could impact community associations throughout the state.

One of the luncheon's central messages was that advocacy comes in many forms and that every contribution matters. Whether through engaging with CLAC on social media, participating in the Buck a Door campaign, or attending Advocacy Days at the Capitol, there are meaningful opportunities for everyone to support the legislative priorities that impact California's community associations.



SB 1007 Defeated: What Boards Should Know and Do Next

BY COOPER R. MCHATTON, ESQ., BEAUMONT TASHJIAN

California community associations received welcome news in late June 2026 when State Senator Caroline Menjivar withdrew SB 1007 from its scheduled Assembly committee hearing. The Bill, which sought to cap regular assessment increases at 8 percent without member approval, effectively died for the current legislative session.

Under existing law, Civil Code section 5605, subdivision (b) allows boards to increase regular assessments by up to 20 percent without member approval. SB 1007 would have lowered this threshold to 8 percent while also adding new requirements for the annual budget report required under Civil Code Section 5300, including detailed comparisons of anticipated versus actual expenditures and management company compensation disclosures. SB 1007 also would have created new pre-hearing evidence disclosure rules for disciplinary matters under a proposed Civil Code Section 5860.

While this Bill was framed as a consumer protection measure, the 8 percent cap would have significantly limited boards' ability to respond to rising insurance costs, aging infrastructure, and statutory maintenance obligations under Civil Code Section 5600. The result could have been greater reliance on special assessments, deferred maintenance, and weakened reserves, outcomes that ultimately harm homeowners through higher long-term costs and reduced property values. In an environment where associations already face escalating operational pressures and new compliance mandates, such a rigid limit would have undermined the very financial stability the Bill purported to protect.

The Bill's defeat was the product of strong, coordinated advocacy by CAI and chapter members who explained these practical consequences to legislators. This success demonstrates that informed, timely advocacy works. However, this Bill is a reminder that similar proposals are likely to return in coming years, and associations should anticipate increased oversight and restrictions in the future as affordability pressures and cost inflation continue to collide.

What Boards Can Do Now

Community managers and association boards that want to stay ahead of future legislation and strengthen their communities should take these steps:

- Engage with CAI. Respond to legislative alerts and support advocacy efforts that protect reasonable board authority. Active participation and collective action ensure that the day-to-day operational realities faced by associations are clearly communicated to policymakers before additional restrictions are proposed or advanced.

- Communicate financial needs to communities clearly and consistently. Owners are more supportive of necessary increases when they understand the data behind reserve studies, insurance renewals, and maintenance requirements. Such transparency helps reduce the likelihood of organized opposition when boards must inevitably make difficult funding decisions.
- Document assessment decisions thoroughly. Minutes should reference the board's duties under Civil Code Section 5600 and tie increases to specific, documented needs, such as current reserve study recommendations or insurance quotes. Strong contemporaneous records not only demonstrate responsible governance but also create a clear, defensible history that can be referenced in response to future legislative scrutiny or owner inquiries.
- Use the preparation of the annual budget report required under Civil Code section 5300 as an opportunity for structured financial planning and risk assessment. By requiring the board to compare projected versus actual expenditures, evaluate reserve funding levels, and consider management company compensation disclosures each year, this process can serve as a built-in checkpoint to identify emerging financial pressures early and adjust course before problems escalate.
- Keep reserve studies current and aligned with budgeting. Up-to-date studies provide the factual foundation both for responsible funding and for responding to legislative inquiries or owner questions about assessment levels. Boards should establish a consistent timeline that integrates reserve study updates with the annual budget process so that funding decisions are always supported by the most recent professional analysis.

The defeat of SB 1007 preserves the balanced framework that allows boards to fulfill their obligations while giving owners appropriate oversight. Associations that operate transparently, fund responsibly, and stay engaged legislatively will be best prepared for whatever proposals arise next. So, while the 2026 legislative session may be over for this particular Bill, the work of responsible stewardship and vigilant advocacy continues, and Associations that prepare now will be ready for whatever comes next. This ongoing effort requires boards to view advocacy not as a one-time response to a specific bill but as a core component of effective governance. By building relationships with legislators, participating in CAI's programs, and sharing real-world experiences from their communities, association leaders can help shape future policy in ways that protect both homeowners and the long-term viability of common interest developments across California.



—Cooper R. McHatton is an associate attorney at Beaumont Tashjian, where he focuses on litigation and client advocacy for community associations.



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BOOTS, BUCKLES & COUNTRY NIGHTS

May 28, 2026

Boots, Buckles & Country Nights returned this year with an evening of networking, entertainment, and Western-themed fun that brought CAI-GRIE members together for one of the Chapter's signature social events. The backyard-inspired atmosphere welcomed attendees with string lights, great conversation, and plenty of opportunities to connect throughout the evening.

Guests enjoyed a wide variety of attractions, including a lively cigar lounge, bourbon tasting, a fan-favorite chili cook-off, line dancing, fun photo opportunities, and the event's first-ever mechanical bull. The mechanical bull quickly became one of the evening's biggest attractions, drawing enthusiastic participants and plenty of laughter from spectators. The barbecue dinner, desserts, and refreshments rounded out an evening that balanced great entertainment with meaningful networking.

Behind the scenes, the Country Faire Committee devoted months of planning to create an event that reflected the welcoming spirit of the Chapter. Their creativity, organization, and attention to detail were evident throughout the evening and played a key role in its success.

In addition to creating a memorable evening, strong sponsor support and outstanding attendance allowed the event to generate a profit for the Chapter, helping support future educational and networking opportunities.

Thank you to everyone who attended, volunteered, sponsored, and supported Boots, Buckles & Country Nights. Your enthusiasm helped make the event a tremendous success, and we look forward to seeing everyone again next year.



(l to r): Chapter Executive Director Erica Tenney, CMCA, AMS and Administrative Assistant Elda Pfitzinger.



Daniel Bonte and the Bonafide.



Line dancing.



Country Faire/Monte Carlo Committee



Ken of Provident Bank on the mechanical bull.



Guests enjoyed a barbecue dinner, desserts, and refreshments.



(l to r): Perry of Victory Wash and Windows, Kara of Four Seasons Tree Care, Desiree of NPG Asphalt, and Executive Director Erica Tenney, CMCA, AMS.



Cigar Lounge sponsored by Brian Berg Insurance.

E-BIKE AND E-MOTORCYCLE SAFETY EVENT

As an onsite manager with a K-8 school in the middle of my community, when I read of recent news of fatalities and serious injuries surrounding the unsafe use of ebikes and emotorcycles, it strikes a nerve. My office window faces the main entry to our common area facility. I see these kids, usually boys, usually without helmets, popping wheelies, riding against the flow of traffic, ignoring stop signs, two ear buds in, generally engaging in unsafe practices that make my manager's brain and my mother's heart sick with worry.

BY SARAH KARLOVIC, CMCA, VICE PRESIDENT OF COMMUNITY MANAGEMENT,
PROFESSIONAL COMMUNITY MANAGEMENT (PCM)

Armed with the approval of my Board and together with my AGM and my Social Committee, we set out to put together an event to teach kids and parents about safe ebike usage. When we sat down to plan, we established the following:

1. **Budget** – \$5,000
2. **Location** – We decided the Clubhouse parking lot would be the best location – centralized near the pool for additional attendance and generally known to the community.
3. **Schedule** – We knew we needed to be sure it is a date/time that will encourage attendance. We opted for the Friday after the last day of school. Too soon to be on summer vacation, and after the hustle and bustle of last day parties and graduation festivities.
4. **Fun** – There *must* be fun. Determining what appeals to kids ages 11-15 was tricky but we knew we needed the kids to *want* to attend. We opted for a DJ, video game truck, nacho bar, an outdoor playing of the Minecraft Movie, ice cream truck (for purchase), a trivia game and cool raffle prizes.
5. **Raffle Prizes** – In all, we had approximately fifteen prizes of varying values. We purchased some bike accessories; we received Amazon gift cards and a four pack of club level Angel tickets (more on that later) from industry partners. Our social committee was not only able to get the local minor league baseball team to send their mascot, but to donate a suite and a jersey as additional raffle prizes.
6. **Information** – Who can we invite to educate the families? There is the obvious, the local Sheriff's Department, but who else? We opted for California Highway Patrol, the local Fire Department and Loma Linda Children's Hospital Emergency Department.
7. **Communications Strategy** – We had a multi-pronged communication strategy to be sure kids would learn about the event even if their parents did not check their emails. We partnered with the principal of the local school who posted our flyers around the school. We posted flyers at the community gym and in the pool restrooms. We also sent an email a day for the three days leading to the event.
8. **Organization** – We decided the events needed to go quickly and be highly organized. We decided that kids could visit the Sheriff's Department, Fire Department and Loma Linda booths to ask questions/get information and the more engaged they were, the more raffle tickets they would earn. Each booth was given their own set of raffle tickets to divvy up as they saw fit. Every attendee was given a schedule of what to expect and when.

On the day of the event, we were all nervous as to what kind of attendance we would see. We hoped that we would make good use of the Association's funds and of the first responder's time. One by one our vendors, service providers and first responders arrived. We set up hydration stations with water, juice and soda on ice. We also set up a popcorn station and directed others on where to set up. Our DJ set up our outdoor movie screen, and our volunteers and onsite staff set up chairs and ez-ups for shade.

When the residents entered, they first saw the fire truck, then the nacho stand, then the popcorn stand, then the Sheriff's Department booth. As residents continued on, they saw the video game truck, the ice cream truck and the outdoor movie night set up. Next to the outdoor movie night screen, the team from Loma Linda Children's Hospital set up their booth complete with terrifying x-rays and pictures of undesirable outcomes. Upon entry, each kid was given raffle tickets, then as they continued through the event, they earned more. The biggest opportunity for earning tickets was at the Safety Trivia portion which

took place after each kid had enough time to hear from all the experts. As the manager, I was watching the trivia portion closely. Many of the kids were crowding my social committee member, certain that if they raised their hand with the correct amount of enthusiasm, they would be chosen to answer the question. It was heartwarming to see the kids being uninhibitedly excited. Little did I know how touching this all would turn out to be.

Get your tissues, folks...

There was one little boy, while eager and attentive, also respectful and courteous. The trivia portion concluded and it was time for raffle prizes. The kids were all thrilled to win their helmets, their phone mounts, their bike covers and the other prizes, but it was clear everyone was hoping to win the four pack of Angel Baseball Tickets. I read the winning numbers slowly, then again, then again. The respectful, courteous boy jumped up and down and declared himself the winner. I checked his ticket and sure enough, he was. Knowing the value of the envelope in my hand and noting he appeared to be about 11 years old, I asked him if there was a grown up at the event with him. He said there was not. My staff and I promised we would keep the tickets safe in the on-site office with us until his parent or guardian could come pick them up to ensure they made it home safely. He provided my team with his name, Jace, and his mother's name, Bryana, along with their last name and his street name. He was clearly disappointed not to be leaving with his tickets but remained respectful and courteous and simply asked for the game date and time so he could tell his mom when he got home.

While the event wrapped up, I went to my desk to connect with his family. I then realized something that still gives me goosebumps. Jace's dad passed away in a tragic car accident approximately two years ago. His mother said his dad was his best friend and his hero. He took himself down to the safety fair knowing his father had passed by in a motor vehicle accident and he was there alone because his mother was home with his siblings. He locked in with the Sheriff's Department, Loma Linda Children's and the Firefighters to learn as much as he could about being safe on his ebike. He left knowing he had won a day of fun for his mother and his siblings. I will not soon forget the high fives he exchanged with friends and the contagiousness of his mega-watt smile.

In all, we had approximately two hundred attendees at our event. Considering our larger events with much higher budgets see approximately five hundred attendees, we considered this a huge success. We sold \$1500 worth of ice cream and increased ebike and motorcycle safety awareness. The representatives from Loma Linda Children's Hospital thanked us for hosting this event because of the potential impact and the number of hurt children they see daily.

As managers our job can often feel tedious and thankless. We are painted with broad brushstrokes, our motives questioned and our credentials dismissed by Facebook warriors and Nextdoor bullies. Let us continue to show up for our communities because for every Facebook warrior or Nextdoor bully, there are many, many more Jace's.



—Sarah Karlovic, CMCA, is the Vice President of Community Management at Professional Community Management (PCM) with over 15 years in Community Management.

PAVING FUNDAMENTALS: COMMON DEFECTS, REPAIRS, LIFECYCLE PLANNING, AND CHOOSING THE RIGHT SOLUTION



Most boards don't think much about their pavement until the phone starts ringing. A pothole appears, trip hazards develop, residents begin to complain, and suddenly the association is faced with expensive repair decisions. Understanding how pavement deteriorates and choosing the right repair at the right time—can save an association significant money over the life of its streets and parking areas. This article provides an overview of common pavement terminology, explains the pavement life cycle, and outlines best practices for selecting the right repair strategy.

Common Defects

- **Alligator Cracking:** A network of interconnected cracks resembling reptile skin. Because it is a fatigue condition tied to the pavement structure, even localized alligator cracking generally requires the failed area to be dug out and patched before resurfacing; an overlay placed over it alone tends to crack back through. Widespread alligator cracking typically indicates base failure and requires removal and replacement.
- **Base Failure:** The crushed-stone base beneath the asphalt has lost its ability to support traffic loads. Surface treatments alone will not correct the problem.

Repair Methods

- **Asphalt Overlay:** Installing a new 1½–2-inch layer of hot-mix asphalt over structurally sound pavement to restore the surface and extend its service life.
- **Crack Sealing:** Sealing cracks ¼ inch or wider to prevent water intrusion and slow deterioration.
- **Sealcoating:** A protective surface treatment that reduces oxidation, UV damage, and surface wear but does not correct structural failures.
- **Digout / Removal and Replacement:** A digout is a localized, full-depth repair that excavates and rebuilds a failed area



BY KATE BENNET, PAVEMASTERS, LLC

of pavement and base. Where structural failure is widespread, the same approach is applied over larger areas as full removal and replacement.

Pavement Life Cycle and Choosing Repairs

Preventive maintenance provides the greatest value when pavement remains structurally sound. As deterioration progresses, repairs should match the underlying condition. Cosmetic treatments should never be used to mask structural failures, while overlays provide an economical middle ground when the base remains intact.

Recommended Maintenance Schedule

The following schedule is a general guideline; actual timing depends on traffic, climate, and construction quality. The key point is that sealcoating and crack sealing are recurring activities—not one-time events—throughout the pavement’s life.

Choosing the Right Solution

Start by defining the association’s objective—whether it is improving appearance, extending service life, or providing long-term structural reliability. Then balance the available budget with the expected lifespan of each repair option. Preventive maintenance almost always costs less than delayed reconstruction, making lifecycle planning the most cost-effective strategy.

Pavement Age / Interval	Recommended Action
First 1–3 years	Annual inspections: crack seal cracks ¼ inch or wider as they appear.
Every 3–5 years	Sealcoat to slow oxidation and UV damage; continue crack sealing as needed.
~20 years	Overlay after localized digout repairs, provided the base remains structurally sound.
After an overlay	Resume the sealcoat and crack-seal cycle (every 3–5 years) to protect the new surface.
~30 years	Targeted repairs while budgeting for future reconstruction.
~45 years	Full reconstruction, with base replacements where needed.

Because pavement replacement is typically one of the association’s largest reserve components, the community should make sure the information is provided to the Reserve Analyst to ensure useful lives, remaining lives, and replacement costs accurately reflect existing conditions before funding decisions are made.

Best Practices for Bidding

- Develop a clear project scope before requesting bids.
- Provide every bidder with the same plans and specifications.
- Conduct a group job walk so all contractors receive the same information.
- Compare scopes of work—not just prices.
- Request alternate or phased approaches when budgets are limited.

Inspection and Ongoing Recommendations

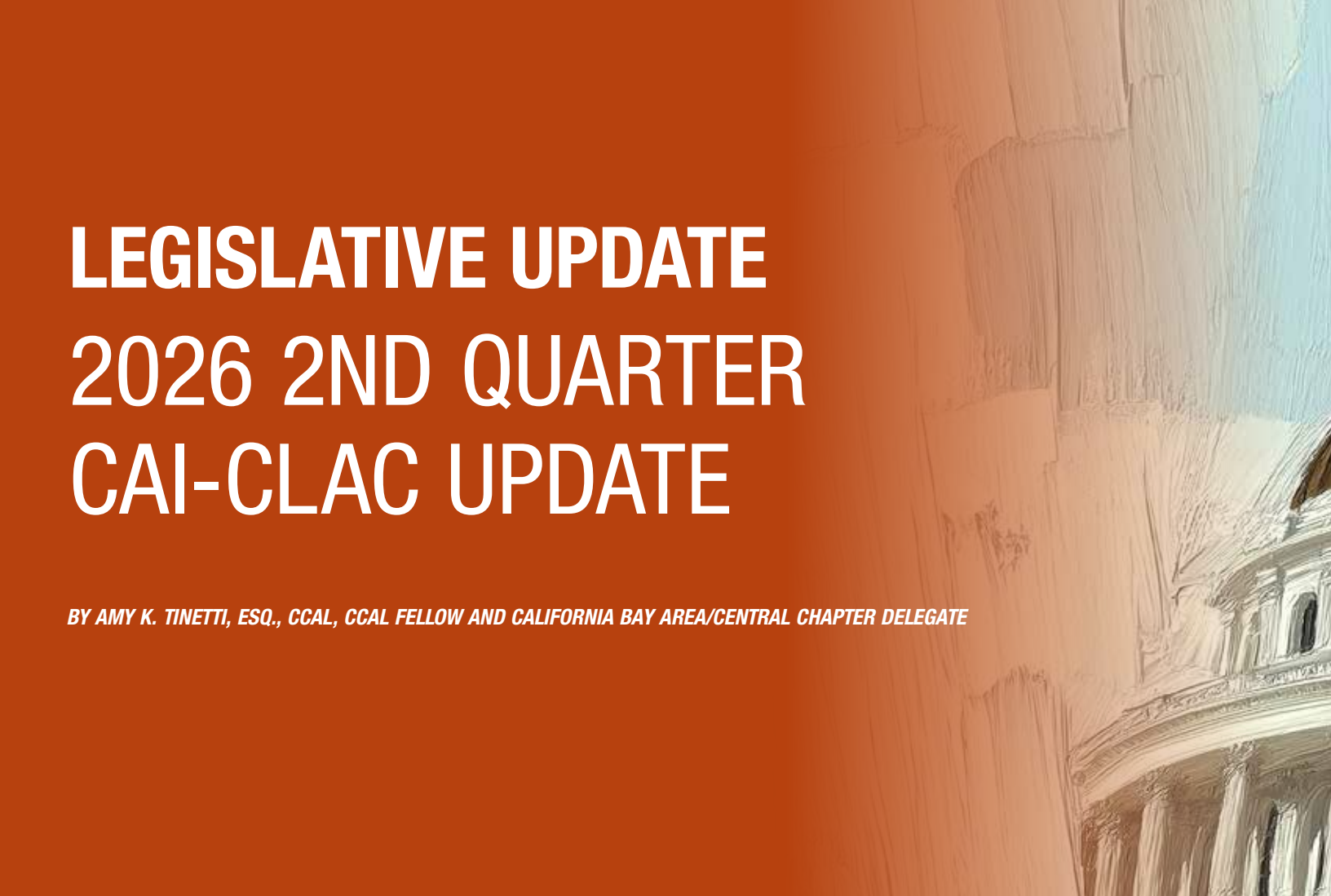
- Inspect pavement annually and after major weather events.
- Document conditions with photographs.
- Address base failures promptly rather than covering them with cosmetic treatments.
- Maintain a history of repairs and use lifecycle costing to forecast future capital needs.

Conclusion

The most expensive pavement repair is often the one that was delayed too long. By understanding how pavement ages, investing in preventive maintenance and selecting repairs that match the underlying condition, boards can protect both their infrastructure and their reserve funds for decades to come.



—Kate Bennet is Vice President, Marketing & Business Development at Pavemasters LLC.



LEGISLATIVE UPDATE

2026 2ND QUARTER

CAI-CLAC UPDATE

BY AMY K. TINETTI, ESQ., CCAL, CCAL FELLOW AND CALIFORNIA BAY AREA/CENTRAL CHAPTER DELEGATE

Legislative Update Disclaimer: *Legislative text, bill status, and advocacy positions can change throughout the legislative session. All content should be reviewed against current legislative status before reliance.*

CAI's California Legislative Action Committee ("CLAC") held its annual Advocacy Days in Sacramento on April 7 and 8, 2026. The event set a record for attendance with 83 registered in-person attendees, over a third of which (29, to be exact) were first-time attendees. The event also set a record for advocacy with 104 in-person office visits with legislators and staffers. It was great to see so many familiar faces, but also wonderful to see so many new attendees excited to advocate on behalf of community associations.

CLAC's role is to monitor bills, take positions on bills before the legislature, and educate legislators on how bills impact community associations. There seem to be more bills that impact community associations in this legislative session than ever before, many of which would adversely affect community associations. This meant there was plenty to discuss with our legislators and their staff members. For the purposes of meeting with the legislators and their staff members, we focused on one Senate Bill (SB 1007) and four Assembly Bills (AB 1892, AB 2050, AB 2579 and AB 1903).

We have already seen the results of our efforts and our Call-to-Action campaigns following Advocacy Days. Senate Bill 1007 (Menjivar), had it been enacted, would have changed longstanding California law that allows boards to increase regular assessments up to 20% from the

previous fiscal year without a member vote. Instead, it would have significantly limited the ability of boards to levy assessments sufficient to meet the financial obligations of their associations. Thanks to CLAC's advocacy efforts, Senator Menjivar pulled the bill right before it was scheduled to be heard by the California Assembly Housing and Community Development Committee and, as of the date of this writing, the bill is likely dead.

When we met with legislators in early April, we advocated in favor of three bills sponsored by CAI-CLAC. The first, Assembly Bill 1892 (Davies), would streamline the elections process by changing the timeline for elections by acclamation (most notably the 90-day nomination period) such that there would only be one timeline for all director elections. Although we narrowed our focus in Sacramento to this issue, Assembly Bill 1892 is an omnibus bill that would make two other needed corrections to existing law. The first would clarify that an association is responsible for repairing and restoring interrupted gas, heat, water, or electrical services when the interruption originates in the common area, unless a utility provider or the Association's governing document state otherwise. The second would clarify that notices regarding electronic voting need only be sent to those voting electronically. Assembly Bill 1892 continues to work its way through the legislature and does not have any opposition.



The second CAI-CLAC sponsored bill is Assembly Bill 2050 (Caloza), which would update reserve study requirements and require associations to fund reserves so the reserve balance is not projected to fall below zero over 30 years. The bill includes a January 1, 2032 operative date to give associations several years to effectuate the required funding. Stacie Donnelly, the other Bay Area/Central California Chapter Delegate and Chair of CLAC, has testified several times before committees on Assembly Bill 2050. The bill, and Stacie's testimony, have been well-received and the bill continues to make its way through the legislature with great momentum.

The third CAI-CLAC sponsored bill discussed was AB 2579 (Petrie-Norris), which proposed changes to the law that went into effect on January 1, 2025, and limited associations' rights to impose fines to encourage compliance with the governing documents. The bill died in committee, but the issue will likely be considered in future legislative sessions.

Finally, we explained to legislators and their staff members why CAI-CLAC opposes Assembly Bill 1903 (Wicks), which would make significant changes to California's longstanding construction defect law and transfer much of the risk (both actual and financial) for construction defects from the builders to the owners. Among other things, the bill makes owners responsible for inspection costs to identify defects, requires actual damage to occur before a claim can be pursued, and requires approval by a significant percentage of the members to file

a lawsuit against the builder. The author is working with the various entities opposed to the bill and is considering several amendments proposed by CLAC and other groups. Assembly Bill 1903 continues to be heard in committee, and advocates from chapter across the state continue to vigorously advocate against it.

CAI-CLAC is tracking, and advocating on, many other proposed pieces of legislation, including Assembly Bill 2439 (Rubio), which would require associations to notify every member by certified return receipt mail when there is a change in the person authorized to receive assessment payments. The bill also includes civil penalties for violations. Additionally, Senate Bill 1238 (Wahab) would legislate that managing agents owe a duty of care to the association and to its members. I encourage each of you to follow the Hot Bills on CAI-CLAC's website (caiclac.com), sign up for legislative updates, and participate in CAI-CLAC's advocacy efforts. Additionally, please consider joining us for Advocacy Days in 2027.



— Amy Tinetti, Esq., CCAL is a Principal/Shareholder at Hughes Gill Cochrane Tinetti, a California law firm with Bay Area roots and recognized as experts in community association law.

JUNE LUNCHEON: PAWS, PEOPLE AND POLICY: FHA COMPLIANCE IN YOUR COMMUNITY

June 10, 2026

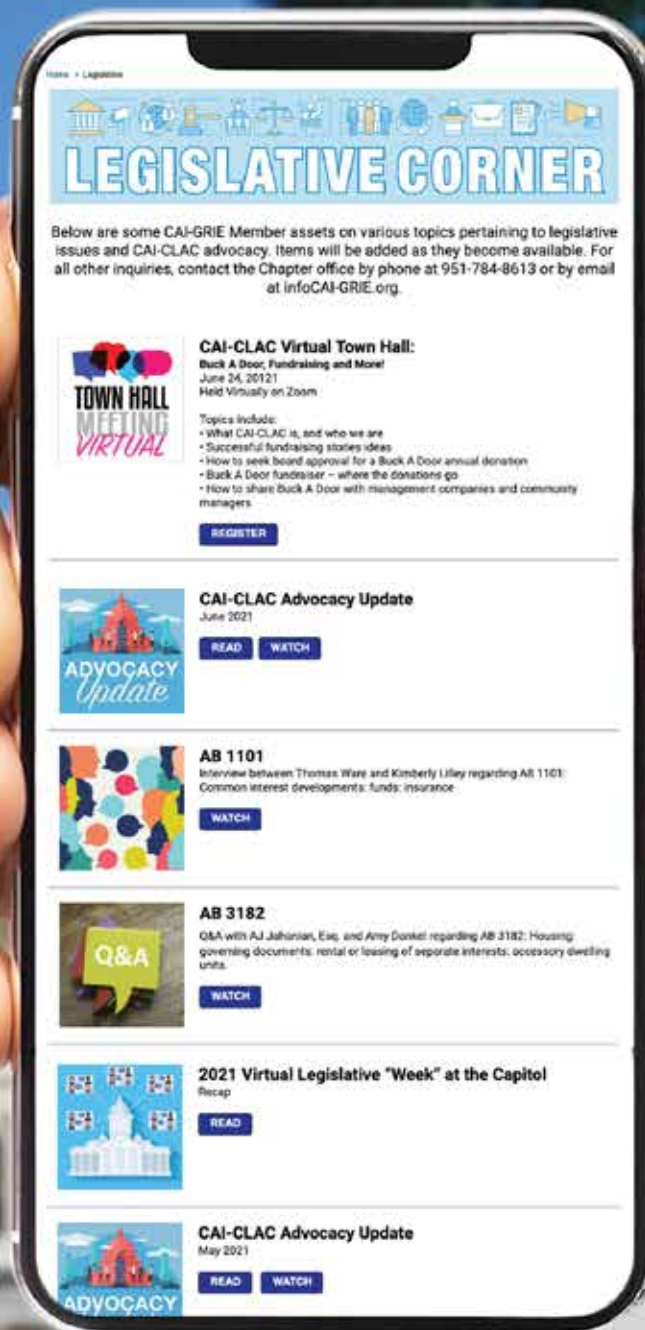
The June Educational Luncheon combined engaging education with plenty of energy, making for one of the Chapter's most interactive events of the year. Held on June 10, the program, "Paws, People and Policy: FHA Compliance in Your Community," brought community managers together for an afternoon of learning, networking, and friendly competition.

Greg Borzilleri and Dyanne Peters led attendees through an interactive game show-style presentation focused on Fair Housing Act (FHA) compliance. Throughout the session, participants tested their knowledge while learning practical strategies for handling accommodation requests, navigating common compliance issues, and responding appropriately to sensitive situations. Starbucks gift cards added to the excitement as attendees enthusiastically participated throughout the presentation.

The combination of practical education, audience participation, and lighthearted competition made for an informative and memorable afternoon. A special thank-you to the DoubleTree for topping off the event with an outstanding dessert spread.



June Luncheon speakers (l to r):
Dyanne Peters, Esq. and Greg Borzilleri



STAY INFORMED WITH CAI-GRIE LEGISLATIVE CORNER

**CAI-CLAC ADVOCACY UPDATES • INTERVIEWS WITH INDUSTRY EXPERTS
STORIES ABOUT CURRENT BILLS • UPCOMING CAI-CLAC EVENTS**

CAI-GRIE.ORG/LEGISLATIVE



BUDGET PLANNING THAT STRENGTHENS HOA FINANCIAL HEALTH



A Community Manager's Approach to Long-Term Stability

*BY DANIELLE LAMPREDA, CMCA, AMS, PCAM,
EQUITY MANAGEMENT & REALTY SERVICES –
THE ASSOCIA COMPANY*

A well-prepared budget is one of the most valuable tools available to a homeowner's association. It serves as the financial roadmap for the year ahead, helping boards maintain community assets, fund future repairs, and meet homeowners' expectations. While budget season often centers on numbers, effective budgeting is ultimately about planning, communication, and protecting the association's long-term financial health.

Start the Budget Process Early

The budgeting process begins long before the board approves a final draft. Developing an accurate budget requires a thorough review of financial statements, reserve funding needs, vendor contracts, and anticipated economic conditions.

For associations with a December 31 fiscal year-end, this groundwork should begin early in the calendar year. Managers should first review the association's governing documents, since some communities' documents require the annual budget package to be distributed earlier than the statutory window, for example, 45 days before the fiscal year-end. Under California's Davis-Stirling Act (Civil Code §5300), the annual

budget report must be distributed between 30 and 90 days before the end of the fiscal year, so knowing where a specific community's deadline falls within that window shapes the entire timeline.

One of the earliest steps, typically in February or March, is to contact the association's reserve analyst to schedule the annual reserve study update. Doing so helps ensure the completed study is received well before budget season, allowing the board sufficient time to evaluate reserve funding recommendations and incorporate them into the upcoming budget.

By the summer months, attention turns to compiling financial data and preparing a preliminary budget. As a best practice, managers should begin this work during July and August, using it as an opportunity to review operating expenses, evaluate reserve funding needs, and discuss potential assessment adjustments with the board of directors. Ideally, the preliminary budget should be presented in late summer, refined during early fall, and finalized by October. This timeline allows adequate time to prepare the required annual budget disclosures and distribute the completed budget package to homeowners before all applicable deadlines.

Delinquencies should also be reviewed as part of this cash-flow planning. For most associations, assessments represent the primary source of revenue, so monitoring delinquent accounts helps boards make informed decisions regarding operating expenses, reserve contributions, and overall cash flow.

Review Operating Expenses and Contracts

A significant portion of every HOA budget is allocated to operating expenses. Managers should work closely with vendors and service providers to identify anticipated cost increases before budget preparation begins. Common operating expenses include:

- Management fees
- Insurance premiums
- Landscaping services
- Pool maintenance
- Security services
- Janitorial services
- Legal and professional fees

Contract reviews are equally important during this stage. Existing agreements should be evaluated for both cost and performance. If contracts are approaching renewal, obtaining competitive bids allows the board to determine whether current pricing remains competitive and aligned with market conditions.

Reserve Funding Matters

Reserve funding is another essential component of the budgeting process. While operating expenses address current needs, reserve contributions prepare the association for future major repairs and replacements. A current reserve study provides valuable guidance regarding projected replacement costs, remaining useful life, and recommended funding levels for community assets. Associations that consistently fund reserves according to professional recommendations are generally better positioned to avoid deferred maintenance and reduce the likelihood of costly special assessments.

Planning for Insurance and Inflation

Insurance planning has also become an increasingly important part of budget development. Associations throughout California continue to experience substantial premium increases due to ongoing changes in the insurance market. As part of the budgeting process, managers should obtain updated insurance proposals and review coverage with the board. Evaluating property, general liability, directors and officers (D&O), fidelity, and umbrella coverage helps ensure the association remains adequately protected while planning for future costs.

Economic conditions should also be factored into the budget. Inflation continues to affect utilities, labor, materials, and contracted services. Anticipating these increases allows boards to proactively plan for rising expenses rather than react to budget shortfalls later in the fiscal year.

Assessment increases are often among the most discussed topics during budget season. Although boards strive to keep assessments affordable, modest annual increases are typically easier for homeowners to absorb than significant increases after years of stagnant funding. Managers play an important role by presenting contracted expenses, projected operating costs, reserve funding recommendations, and long-term financial projections. This information helps boards make informed decisions while balancing fiscal responsibility with the community's needs.

Communicating the Budget to Homeowners

Once the proposed budget is complete, managers should prepare a comprehensive budget package for board review. A complete package typically includes operating expenses, reserve contributions, assessment calculations, budget variances, and projected cash flow. Presenting this information in a clear, organized format supports informed decision-making and promotes productive board discussions.

Equally important is communicating the adopted budget to homeowners. Annual budget disclosures provide an opportunity to explain assessment changes, reserve funding goals, and planned community projects. Transparent communication helps residents understand how assessment dollars are being allocated and why certain financial decisions are necessary.

Successful budget planning is more than an annual requirement; it is an ongoing process that supports the association's ability to preserve property values, maintain common-area assets, and prepare for future obligations. By starting early, collaborating with vendors and insurance professionals, reviewing contracts carefully, and relying on realistic financial forecasting, boards and managers can develop budgets that strengthen their communities for years to come. Scheduling the annual reserve study early each year is one of the simplest ways to keep this process on track—and a trusted reserve analyst can help managers coordinate that step well ahead of budget season.



—Danielle Lampreda is Senior Community Manager & Director of Community Growth And Development at Equity Management & Realty Services - The Associa Company.



ANNUAL BOWLING NIGHT

June 25, 2026

**BY KRISTINA BUTLER OF PARK WEST LANDSCAPE INC.,
CO-CHAIR OF SPECIAL EVENTS COMMITTEE**

On June 25, CAI-GRIE's Special Events Committee hosted our annual Bowling Night at our new venue, Temecula Lanes. With the entire bowling alley reserved exclusively for our group, attendees enjoyed a fun, private atmosphere that made networking and a little friendly competition even more memorable. Shakey's added a nostalgic touch to the evening with its classic pizza, wings, and everyone's favorite—Mojo Potatoes. A heartfelt thank you to our sponsors, members who attended, and the committee members whose hard work and dedication made this event such a success. We had a fantastic time and look forward to seeing everyone at our next CAI-GRIE event! Thank you to everyone who attended, volunteered, sponsored, and supported Boots, Buckles & Country Nights. Your enthusiasm helped make the event a tremendous success, and we look forward to seeing everyone again next year.



Team NPG and Team Sherwin Williams.



Winning team.

WORKING TOGETHER TO CREATE A GREAT BUDGET AND A GREAT RESERVE STUDY

The Community Manager and Reserve Analyst Partnership

*BY DANIELLE LAMPREDA, EQUITY MANAGEMENT & REALTY SERVICES – THE ASSOCIA COMPANY
AND SEAN ANDERSEN, PRA, RS, PRESIDENT, ASSOCIATION RESERVES*



The best-run community associations don't build their annual budget and their Reserve Study separately. They treat the two as one conversation. The Community Manager and the Reserve Specialist should be talking throughout the year and not having an abbreviated discussion during budget time.

When that coordination breaks down, problems occur, and they're expensive: underfunded reserves, deferred maintenance, and special assessments. In almost every case, the problem isn't a lack of effort. It's a lack of coordination and preparation.

A Reserve Study is far more than a report you file to satisfy Civil Code § 5550. It's a long-term plan for the repairs and replacements every association eventually faces, from roofs and asphalt to paint, pool equipment, and mechanical systems. The annual budget is the other half of that plan: the funding mechanism that turns the study's recommendations into real dollars set aside for real projects.

When the manager and analyst work from the same page, and the board sees what is coming, understands what it costs, and acts before failure, an association will be set up for success long-term.

The Reserve Study and the Budget Are the Same Conversation

Too many associations run the Reserve Study and the annual budget as two separate projects. They're not. They're two halves of one financial plan.

The Reserve Study answers what needs to be done, when, and how much it will cost, and it recommends the annual allocation to get there. The budget decides how the association collects and allocates those funds. One without the other is only half a plan.

A good Reserve Study shouldn't sit on a shelf until the next update. It's a year-round tool: the component list becomes your project calendar, the Funding Plan becomes the basis for your reserve allocations, and the 30-year cash flow forecast guides the major financial decisions in between.

The manager keeps the study honest by tracking completed projects, pulling fresh proposals, watching component conditions, and flagging what's ahead. The Reserve Analyst turns that field reality into realistic costs and a funding strategy.

Why Collaboration Matters

Reserve allocations are one of the largest line items in most association budgets, often amounting to 15 to 40 percent of the total.

Underfunding reserves does more than postpone maintenance. Lenders look at reserve funding, and increasingly at the Percent Funded designation, when owners try to buy, sell, or refinance. Fannie Mae and Freddie Mac have tightened their condo project and HOA standards, and a low Percent Funded can stall financing for an entire community. Sound reserve planning and implementation protects the association and the property values that ride on them.

Working together, the manager and the Reserve Specialist help the board answer the questions that matter:

- What projects are coming next?
- What will they cost?

- When should they be completed?
- How much should we be contributing to reserves?
- Will the money be there when the work is due?

Answer those proactively, and the board is steering. Answer them late, and the community ends up just reacting to one financial surprise after another.

A Simple Three-Phase Process

Phase One: Gather the Information

A few months ahead of budget season, the manager reviews the current Reserve Study, flags upcoming projects, collects updated vendor proposals, and pulls together the relevant financials. A board's decisions are only as good as the information behind them.

Phase Two: Update the Reserve Study

The Reserve Specialist inspects the site, reassesses component conditions, updates replacement costs to current market prices, and revises the Funding Plan. Reviewing that early, rather than at the eleventh hour, leaves room for a real discussion about timing, funding level, and community priorities.

Phase Three: Integrate It Into the Budget

With the study finalized, management folds the recommended reserve contribution into the annual budget and presents both documents together so the board can see exactly how long-term planning drives this year's assessment. Once the budget is approved, the reserve summary and disclosures go out to the membership, giving owners a clear picture of where their assessment dollars go and how the community is preparing for what lies ahead.

A Partnership That Protects Property Values

Reserve planning is an ongoing conversation among the board, the management team, and the Reserve Analyst, with the funding plan reviewed and adjusted every year.

The community manager brings the operational side: project history, vendor relationships, maintenance records, and day-to-day financials. The Reserve Analyst brings the technical side: component deterioration, useful life analysis, current replacement costs, and long-term funding strategy. Neither one builds the best study, or the best budget, alone.

Roofs age, asphalt cracks, paint fades, and mechanical systems wear out. Mother Nature and Father Time don't take a year off. The associations that protect property values best are the ones that plan ahead, communicate all year, and align their Reserve Study with their budget every single year. A well-funded reserve isn't an expense, it's protection for the community's future.



—Danielle Lampreda is Senior Community Manager & Director of Community Growth And Development at Equity Management & Realty Services - The Associa Company.



—Sean Andersen, PRA, RS, President, Association Reserves serves as Editor to CAI-GRIE Connect magazine.



2026 CAI-GRIE UPCOMING EVENTS

SEPTEMBER

September 25

Trap Shooting

8:00am
Prado Olympic Park
Chino

OCTOBER

October 8

**Movie Night &
Trunk or Treat**

5:30pm
Skyview Event Center
5257 Wineville Avenue
Jurupa Valley, CA 91752

October 14

October Luncheon

10:30am
Europa Village Winery
Temecula

NOVEMBER

November 4

**November Luncheon
Legislative Update**

10:30am
DoubleTree Ontario

November 21

**2026 TOPS Awards
and Monte Carlo Night**

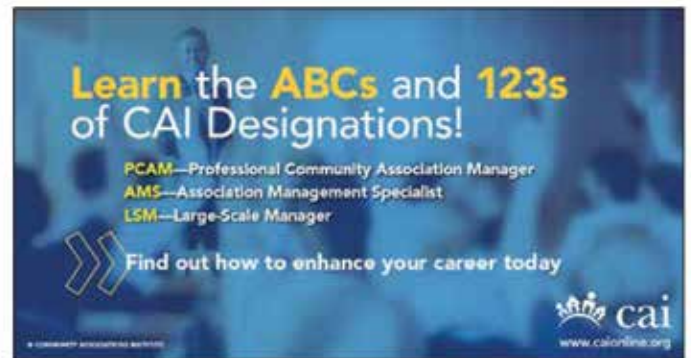
5:30pm
We are back at Pechanga after three years
off so be sure to sign up early.

DECEMBER

December 17

Holiday Party

5:30pm
Luke's on Front
Temecula



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EXCELLENT LUNCHEON PRESENTATIONS ARE ESSENTIAL CAI-GRIE'S SUCCESS. SINCE OUR CHAPTER MEMBERS PRIORITIZE THEIR TIME, OUR GOAL IS TO PRESENT TOPICS THAT ARE TIMELY, EDUCATIONAL NOT PROMOTIONAL, GEARED TOWARDS MANAGERS AND HOMEOWNER LEADERS. INFORMATION PRESENTED IS ESSENTIAL TO OUR MEMBERS' PROFESSIONAL DEVELOPMENT. THIS IS AN EXCELLENT OPPORTUNITY FOR YOU TO DEMONSTRATE EXPERTISE IN YOUR FIELD. SUBMIT YOUR PRESENTATION HERE:





Winter Wonderland

JOIN US FOR OUR ANNUAL
MONTE CARLO NIGHT & TOPS AWARDS

NOVEMBER 21, 2026

PECHANGA RESORT AND CASINO
45000 PECHANGA PARKWAY
TEMECULA, CA 92592

5:30PM - 11:00PM

PRESENTED BY

